



Gender mainstreaming

Advancing work–life balance with EU Funds. A model for integrated gender-responsive interventions

Acknowledgements

This report is part of the work of the European Institute for Gender Equality (EIGE) on gender budgeting.

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European Institute for Gender Equality

The European Institute for Gender Equality (EIGE) is an autonomous body of the European Union established to strengthen gender equality across the EU. Equality between women and men is a fundamental value of the EU and EIGE's task is to make this a reality in Europe and beyond. This includes becoming a European knowledge centre on gender equality issues, supporting gender mainstreaming in all EU and Member State policies, and fighting discrimination based on sex.

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Advancing work–life balance with EU Funds. A model for integrated gender-responsive interventions

Foreword

The EU's budget can be a powerful force for growth and development. Investment programmes such as the European Structural and Investment Funds (ESIF) have helped transform less-developed regions and reduce inequality across the EU.

Yet, when it comes to reducing inequalities between women and men, the EU's budget falls short. EIGE's research shows that less than 1 % of the 2014–2020 ESIF budget has been earmarked for gender equality measures.

This is despite a strong body of evidence confirming that more gender-equal societies are a foundation for economic growth. Indeed, narrowing the gender gap in the EU could result in an extra 10 million jobs and an increase of up to EUR 3.15 trillion in gross domestic product by 2050.

Gender budgeting is a strategy to achieve gender equality through allocating public resources in a way that addresses the specific needs of women and men. For example, gender budgeting recognises different societal roles that women and men perform, such as women's unpaid care work, and distributes resources accordingly. It is both efficient and effective budgeting.

Making gender equality a reality requires a firm commitment supported by dedicated and consistent funding. Despite the fact that a number of EU policies highlight the importance of mainstreaming gender into the Union's budget, EU Funds and Member State budgets, current proposals for the post-2020 EU budget show a low level of ambition when it comes to realising gender equality through economic measures. Gender equality is defined as a horizontal principle, which is not accompanied by objectives, nor supported by gender-specific targets, which highlight and aim to close gender gaps.

EIGE has outlined concrete action the EU institutions and Member States can take to help

live up to the values and principles of the EU through improved gender mainstreaming and budgeting. EIGE proposes recommendations for the Multiannual Financial Framework (MFF), the annual budgetary cycle, the European Semester and the EU Funds. Recommendations include the setting of gender equality as a horizontal priority for the entire MFF; embedding gender equality as a distinct policy objective and institutionalising gender mainstreaming methods in all funds; the setting of budgetary targets for gender equality; and the introduction of a system to track funding for gender equality in all funding programmes.

This report proposes a model to advance gender equality in Member States by transforming roles and responsibilities in care work. The model supports innovative practice and gender analysis to realise the potential of the European Social Fund and the European Regional Development Fund in the promotion of work–life balance in the EU.

Gender equality is a fundamental value of the European Union and its advancement is coded into the EU's legislative framework. The EU's investment programmes are the most direct way for EU resources to reach those who need them and to impact individual lives and well-being. Ensuring that women and men benefit equally can help close gender gaps and boost the economy, ultimately benefiting us all.

Finally, I would like to thank Virginija Langbakk, EIGE's former Director for her invaluable contribution to the development of this model. A practical tool tailored to the needs of future users, I am positive it will contribute to improved gender budgeting at the EU level.

Carlien Scheele

Director

European Institute for Gender Equality

Abbreviations

Member State abbreviations

BE	Belgium
BG	Bulgaria
CZ	Czechia
DK	Denmark
DE	Germany
EE	Estonia
IE	Ireland
EL	Greece
ES	Spain
FR	France
HR	Croatia
IT	Italy
CY	Cyprus
LV	Latvia
LT	Lithuania
LU	Luxembourg
HU	Hungary
MT	Malta
NL	Netherlands
AT	Austria
PL	Poland
PT	Portugal
RO	Romania
SI	Slovenia
SK	Slovakia
FI	Finland
SE	Sweden
UK	United Kingdom

Frequently used abbreviations

AMIF	Asylum and Migration Fund
BMVI	Federal Ministry of Transport and Digital Infrastructure of Germany
CF	Cohesion Fund
CFR	Charter of Fundamental Rights of the European Union
CPR	common provisions regulation
EAFRD	European Agricultural Fund for Rural Development
EIGE	European Institute for Gender Equality
EMFF	European Maritime and Fisheries Fund
ERDF	European Regional Development Fund
ESF	European Social Fund
ESF+	European Social Fund Plus
ESIF	European Structural and Investment Funds
EU Funds	European Union Funds under shared management
GNI	gross national income
ICT	information and communications technology
ISF	Internal Security Fund
MFF	multiannual financial framework
M&E	monitoring and evaluation
MS(s)	Member State(s)
OECD	Organisation for Economic Co-Operation and Development
OP(s)	Operational Programme(s)
PA(s)	Partnership Agreement(s)
PO	policy objective
SDG	Sustainable Development Goal
SME(s)	small and medium-sized enterprise(s)
TFEU	Treaty on the Functioning of the European Union
WLB	work-life balance

Contents

Foreword	3
Abbreviations	4
Glossary of terms	6
Introduction	8
Structure of this publication	9
1. Gender equality and the EU Funds	10
2. WLB and gender equality	12
2.1. The concept of WLB	12
2.2. Different types of care work in current ESIF interventions	12
2.3. Legislative levers for WLB	16
2.4. Policy and finance levers for WLB	18
2.4.1. Financial levers for WLB	20
3. Social care investments: the economic case for investments in WLB	23
3.1. Social and economic infrastructure and WLB	23
4. ESF and ERDF financing for WLB in practice: examples of integrated measures	26
4.1. Integrated initiatives between the ESF and ERDF in the field of WLB	27
4.2. Next funding period 2021–2027: how to advance WLB with the EU Funds?	31
5. Practical model for promoting WLB through the ESF+ and ERDF: interventions and examples	36
5.1. Overview of the model	36
5.2. Steps 1, 2 and 3	37
5.3. Step 4: Follow-up through the use of indicators within M&E systems	42
5.4. Fictional case studies on applying the model's steps	43
References	49

Glossary of terms

Care

Care is a concept that encompasses the processes of creating, sustaining and reproducing people, selves and social relationships on three levels: (1) caring for the self, (2) caring for others and (3) caring for the world (1).

Care tends to be presented as something only needed by the 'needy' – children, the ill, the elderly and/or persons living with disabilities (2). Yet, the survival of all human beings depends on care. At different stages of our lives, we may be more dependent on care than we are during others.

Formal and informal (social) care

Informal care is typically understood as unpaid labour undertaken in the private realm of the household as part of pre-existing relationships within kinship and marital relations, friendship or neighbourliness (3). Formal care is defined as paid labour performed by professional care workers, in the public domain based on contractual relationships (4).

Gender mainstreaming

Gender mainstreaming has been embraced internationally as a strategy towards realising gender

equality. It involves the integration of a gender perspective into the preparation, design, implementation, monitoring and evaluation of policies, regulatory measures and spending programmes, with a view to promoting equality between women and men and combating discrimination (5).

Gender budgeting (6)

Gender budgeting is a strategy to achieve equality between women and men by focusing on how public resources are collected and spent (7). The Council of Europe (2005, p. 10) defines gender budgeting as 'an application of gender mainstreaming in the budgetary process. It means a gender-based assessment of budgets, incorporating a gender perspective at all levels of the budgetary process and restructuring revenues and expenditures in order to promote gender equality' (8).

Financing for gender equality

Making gender equality a reality requires dedicated and consistent funding. Financing for gender equality is a means of ensuring that gender equality commitments are met in planning.

The commitments of governments to finance the realisation of women's rights and the advancement of gender equality are set out in a

(1) Tronto, J. C. (2013), *Caring Democracy – Markets, Equality, and Justice*, New York University Press, New York.

(2) Nguyen, M. T. N., Zavoretti, R. and Tronto, J. (2017), 'Beyond the global care chain – boundaries, institutions and ethics of care', *Ethics and Social Welfare*, Vol. 11, No 3, pp. 199–212.

(3) OECD (2005), *Long-term Care for Older People*, The OECD Health Project, OECD Publishing, Paris. Available at: <https://doi.org/10.1787/9789264015852-en>;

Triantafillou et al. (2011), 'Informal care in the long-term care system'. Available at: http://interlinks.euro.centre.org/sites/default/files/WP5_Informal_care_ExecutiveSummary_FINAL_1.pdf;

Barnes, M. (2012), *Care in Everyday Life – An ethic of care in practice*, Bristol University Press, Bristol. Available at: <https://policy.bristol-universitypress.co.uk/care-in-everyday-life>

(4) Ungerson, C. (1995), 'Gender, cash and informal care – European perspectives and dilemmas', *Journal of Social Policy*, Vol. 24, No 1, pp. 31–52. Available at: doi:10.1017/S004727940002451X;

Triantafillou et al., 2011.

(5) EIGE, 'Gender mainstreaming – What is gender mainstreaming'. Available at: <https://eige.europa.eu/gender-mainstreaming/what-is-gender-mainstreaming>

(6) For a full description of gender budgeting as a gender mainstreaming tool, see: EIGE, 'Gender mainstreaming – Methods and tools – Gender budgeting' (available at: <https://eige.europa.eu/gender-mainstreaming/methods-tools/gender-budgeting>) and EIGE (2019), *Gender Budgeting. Mainstreaming gender into the EU budget and macroeconomic policy framework*, Publications Office of the European Union, Luxembourg (available at: <https://eige.europa.eu/publications/gender-budgeting-mainstreaming-gender-eu-budget-and-macroeconomic-policy-framework>).

(7) *Ibid.*

(8) Council of Europe (2005), 'Gender budgeting – final report of the Group of Specialists on Gender Budgeting (EG-S-GB)', Directorate General of Human Rights, Council of Europe, Strasbourg. Available at: <https://rm.coe.int/1680596143>

number of international treaties, agreements and policies, most notably the Beijing Platform for Action and the Convention on the Elimination of All Forms of Discrimination against Women. Most recently, the Addis Ababa action plan on transformative financing for gender equality and women's empowerment has emerged as a key tool for translating political commitments into action and addressing the chronic underinvestment in gender equality ⁽⁹⁾.

European Structural and Investment Funds

The European Structural and Investment Funds are the EU's main investment policy tools. For the period 2014–2020, they consist of the European Regional Development Fund, the European Social Fund, the Cohesion Fund, the European Agricultural Fund for Rural Development and the European Maritime and Fisheries Fund. Member States administer the funds through shared management with the European Commission. The funds are implemented through national and/or regional programmes that are co-financed by Member States.

Infrastructure

[Economic] infrastructure is defined as the set of goods and services that are needed for a society to operate and as such its benefits reach beyond its pool of direct users ⁽¹⁰⁾. It is typically considered to be physical, such as buildings and the construction of buildings, bridges, roads, houses and railways.

Social infrastructure refers to all the services that provide education, care and health, including care for older people and persons living with disabilities, as well as childcare. This approach to social infrastructure includes the skilled workforce providing care services, in addition to the physical facilities where care services are provided.

Work–life balance

Work–life balance is about striking a balance between 'work' and 'life'. Here, 'work' means paid work, and 'life' means everything else – including, but not limited to, unpaid work, domestic work (cleaning, cooking, washing, etc.), care work (taking care of children, older people, people who are ill, persons living with disabilities and oneself), leisure time and social activities.

⁽⁹⁾ Puri, L. and Khan, Z. (2016), 'Financing for gender equality and women's empowerment – what have we achieved in Addis Ababa?', *SDC Gender Equality Network Newsletter*, No 3, November 2015, pp. 3–4. Available at: <https://www.shareweb.ch/site/Gender/Documents/Activities/News/Newsletter/Newsletters%20Engl/2015/2015-11%20Gendernet%20Newsletter%20-%20Financing%20for%20Development-2.pdf>

⁽¹⁰⁾ UK Women's Budget Group (2018), *Women Count – a casebook for gender responsive budgeting groups*, Women's Budget Group, p. 38. Available at: <https://womenscount.wbg.org.uk/uploads/section-pdfs/Women-Count-A-Casebook-for-GRB-Groups.pdf>

Introduction

Gender equality is one of the European Union's core principles, enshrined in its [treaties](#) and the [Charter of Fundamental Rights of the European Union \(CFR\)](#) ⁽¹¹⁾. It is critical to the achievement of the EU goals for smart, sustainable and inclusive growth ⁽¹²⁾ and therefore the objectives of the [European Structural and Investment Funds \(ESIF\)](#) ⁽¹³⁾ and the EU Funds under the future common provisions regulation (CPR) (EU Funds) ⁽¹⁴⁾.

Yet, inequalities persist across the EU. Women are under-represented in the labour market and in management positions, while men are

under-represented in unpaid care work. Only every third man engages daily in cooking and housework, compared to almost every woman ⁽¹⁵⁾. While there has been progress for women in the labour market, over the past 10 years there have been almost no improvements on gender equality in the sphere of unpaid care responsibilities ⁽¹⁶⁾.

The EU's new directive on work–life balance (WLB) calls for both legislative and non-legislative measures to tackle women's under-representation in the labour market and their over-representation in non-remunerated care-work. As part of the

⁽¹¹⁾ Specifically Articles 2 and 3(3) of the Treaty on the European Union (TEU), Article 8 of the Treaty on the Functioning of the European Union (TFEU) and Article 21 of the Charter of Fundamental Rights of the European Union (CFR).

⁽¹²⁾ EIGE (2017f), *Economic benefits of gender equality in the European Union – Report on the empirical application of the model*, Publications Office of the European Union, Luxembourg;

EIGE (2017g), *Economic benefits of gender equality in the European Union – Literature review: existing evidence and methodological approaches*, Publications Office of the European Union, Luxembourg;

EIGE (2017b), *Economic benefits of gender equality in the EU – EU and EU Member States overviews*, Publications Office of the European Union, Luxembourg;

EIGE (2017a), *Economic benefits of gender equality in the EU – Economic impacts of gender equality in the EU policy context*, briefing paper;

EIGE (2017e), *Economic benefits of gender equality in the EU – Overall economic impacts of gender equality*, briefing paper;

EIGE (2017c), *Economic benefits of gender equality in the EU – How gender equality in STEM education leads to economic growth*, briefing paper;

EIGE (2017d), *Economic benefits of gender equality in the EU – How closing the gender gaps in labour market activity and pay leads to economic growth*, briefing paper.

⁽¹³⁾ European Parliament and Council (2013b), Regulation (EU) No 1303/2013 of the European Parliament and of the Council of 17 December 2013 laying down common provisions on the European Regional Development Fund, the European Social Fund, the Cohesion Fund, the European Agricultural Fund for Rural Development and the European Maritime and Fisheries Fund and laying down general provisions on the European Regional Development Fund, the European Social Fund, the Cohesion Fund and the European Maritime and Fisheries Fund and repealing Council Regulation (EC) No 1083/2006. Available at: <https://eur-lex.europa.eu/legal-content/en/TXT/?uri=celex%3A32013R1303>

⁽¹⁴⁾ (1) CPR: European Commission (2018b), Proposal for a regulation of the European Parliament and of the Council laying down common provisions on the European Regional Development Fund, the European Social Fund Plus, the Cohesion Fund, and the European Maritime and Fisheries Fund and financial rules for those and for the Asylum and Migration Fund, the Internal Security Fund and the Border Management and Visa Instrument, COM(2018) 375 final. Available at: <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=COM%3A2018%3A375%3AFIN>;

(2) ERDF and CF: European Commission (2018d), Proposal for a regulation of the European Parliament and of the Council on the European Regional Development Fund and on the Cohesion Fund, COM(2018) 372 final. Available at: <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=COM%3A2018%3A372%3AFIN>;

(3) ESF: European Commission (2018g), Proposal for a regulation of the European Parliament and of the Council on the European Social Fund Plus (ESF+), COM(2018) 382 final. Available at: https://ec.europa.eu/commission/sites/beta-political/files/budget-may2018-european-social-fund-plus-regulation_en.pdf;

(4) EAFRD: European Commission (2018e), Proposal for a regulation of the European Parliament and of the Council establishing rules on support for strategic plans to be drawn up by Member States under the Common Agricultural Policy (CAP Strategic Plans) and financed by the European Agricultural Guarantee Fund and by the European Agricultural Fund for Rural Development (EAFRD) and repealing Regulation (EU) No 1305/2013 of the European Parliament and of the Council and Regulation (EU) No 1307/2013 of the European Parliament and of the Council, COM(2018) 392 final. Available at: <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=COM%3A2018%3A392%3AFIN>;

(5) EMFF: European Commission (2018f), Proposal for a regulation of the European Parliament and of the Council on the European Maritime and Fisheries Fund and repealing Regulation (EU) No 508/2014 of the European Parliament and of the Council, COM(2018) 390 final. Available at: <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=COM%3A2018%3A390%3AFIN>

⁽¹⁵⁾ EIGE (2017h), *Gender Equality Index 2017 – Measuring gender equality in the European Union 2005–2015 – Report*, Publications Office of the European Union.

⁽¹⁶⁾ *Ibid.*

Commission's initiative to support WLB for working parents and carers, the Commission will 'ensure, together with Member States, that the European Social Fund and other structural and investment funds are supporting adequately work-life balance measures' ⁽¹⁷⁾.

This model supports innovative practice and gender analysis to realise the potential of the European Social Fund and the European Social Fund Plus (ESF/ESF+) and the European Regional Development Fund (ERDF) to promote WLB in the European Union.

It centres on addressing the gendered dimensions of care, alongside the structures of gender relations that:

- maintain traditional gender roles in employment, parenting and care;
- maintain stereotypes;
- limit women's and men's access to employment and training.

This model encourages policymakers, programme managers and project designers to take an expansive view of care. This means considering not only childcare, but also care for older people or persons with disabilities and, more broadly, the different dimensions of social care. The aim is for the model to be used to advance gender equality in Member States by transforming roles and responsibilities both in formal and informal care structures.

The guidance and practical model set out in this document draws on three levers – legislative, policy and financial. It intends to support the formulation of programmes during the next round of the ESF+ and ERDF. The model should be regarded as a document supporting the advancement of WLB

in the implementation of the ESF/ESF+ and ERDF, and complementing the implementation of the new directive on WLB.

Structure of this publication

Part 1 introduces the framework of gender equality in relation to the EU Funds.

Part 2 introduces the concepts of WLB and care. It sets out the policy and legislative mechanisms for WLB, presents the compelling economic and social justice arguments for action, and highlights how WLB is key to advancing gender equality.

Part 3 focuses on the concept of social care provision – including childcare, care for older people and other forms of social care that are essential for addressing the gender division of labour – as part of the social and economic infrastructure to create an economy of well-being.

Part 4 explores measures that promote WLB within the ESF and ERDF by highlighting the experiences of Member States, and outlines how the funds can be combined to advance WLB.

Part 5 outlines opportunities for ensuring financing for gender equality through the practical application of WLB measures via the ESF+ and ERDF in the next funding period (2021–2027). This section proposes an analytical model for managing authorities and other institutions engaged in programme formulation and project design. The proposed model is based on specific actions and interventions possible within ESF+ and ERDF programmes that could be applied to deliver improved WLB outcomes through structural funds and investments.

⁽¹⁷⁾ European Commission (2017), Commission communication – An initiative to support work-life balance for working parents and carers, COM(2017) 252 final. Available at: <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=COM:2017:252:FIN>

1. Gender equality and the EU Funds

Gender equality is one of the core principles of the European Union, enshrined in its treaties – specifically Articles 2 and 3(3) of the Treaty on the European Union (TEU), Article 8 of the Treaty on the Functioning of the European Union (TFEU) – and in Article 21 of the CFR.

Article 8 of the TFEU charges the European Union with the task of eliminating inequalities and promoting equality between men and women through all of its activities (gender mainstreaming).

Gender mainstreaming is a strategy to integrate gender concerns into all policies and programmes of EU institutions and Member States. Within the European Union, gender mainstreaming was first defined by the European Commission in 1996 as:

mobilising all general policies and measures specifically for the purpose of achieving equality by actively and openly taking into account at the planning stage their possible effects on the respective situations of men and women (gender perspective) (p. 2) (18).

These overarching commitments have trickled down to the EU's work. Thus, gender equality is part of the overall objectives of the ESIF, with gender mainstreaming as a strategy to accomplish those goals. In 2014–2020, the ESIF should, at all stages – including planning, monitoring, reporting and evaluation – aim at eliminating inequalities, promoting gender equality and integrating a gender perspective (19).

The European Commission's proposal of regulations for the 2021–2027 programming period (20) renews the commitment to the dual approach to gender equality with specific measures ('eliminating inequalities and promoting equality between men and women') alongside gender mainstreaming ('integrating the

gender perspective')

Member States and the Commission should aim at eliminating inequalities and at promoting equality between men and women and integrating the gender perspective, as well as at combating discrimination based on sex, racial or ethnic origin, religion or belief, disability, age or sexual orientation. The Funds should not support actions that contribute to any form of segregation (CPR: European Commission (2018), COM(2018) 375 final; point 5, p. 13).

Other legal and policy provisions that feature descriptions on how gender inequalities could be tackled by EU Funds include the following.

- The [European Pact for Gender Equality 2011–2020](#) outlines how gender inequalities will be tackled by the ESIF. This includes promoting a better WLB for women and men (21).
- The [Strategic Engagement for Gender Equality 2016–2019](#) calls on the European Commission to support Member States to use the ESIF for investments in, among others, public childcare and care for older people, as a strategy to increase women's labour market participation.
- Using the EU Funds to facilitate the reconciliation of work and private life is also at the heart of the [Commission's WLB initiative](#), which calls on the European Commission and Member States to use the EU Funds to facilitate the reconciliation of work and private life, and which led to the recently adopted directive on WLB.
- The European Parliament promotes the use of EU Funds to enhance gender equality. Its resolution on the EU strategy for equality between women and men post 2015 calls on the European Commission to support Member States to use the ESIF for investments in

(18) European Commission (1996), Commission communication – Incorporating equal opportunities for women and men into all community policies and activities, COM(96) 67 final. Available at: <https://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:1996:0067:FIN:EN:PDF>

(19) Article 7 CPR (European Parliament and Council (2013b), (EU) No 1303/2013).

(20) (1) CPR: European Commission (2018c), COM(2018) 375 final;

(2) ERDF and CF: European Commission (2018d), COM(2018) 372 final;

(3) ESF: European Commission (2018g), COM(2018) 382 final;

(4) EAFRD: European Commission (2018e), COM(2018) 392 final;

(5) EMFF: European Commission (2018f), COM(2018) 390 final.

(21) EIGE (2016), 'Relevance of gender in the policy area', in *Gender in regional cohesion policy*, Publications Office of the European Union, Luxembourg. Available at: <https://eige.europa.eu/publications/gender-regional-cohesion-policy>

public childcare and care for older people, as a strategy to increase women's participation in the labour market.

These legislative, policy and financial levers are integral to the advancement of gender equality by EU institutions and Member States. As such,

three sets of measures – legal, policy and finance measures – are essential for effective gender mainstreaming. They are equally essential for the formulation, implementation and evaluation of measures to promote WLB as part of an integrated strategy to advance gender equality. This guidance draws on all three of these key levers.

2. WLB and gender equality

This section provides the following.

- A definition of the concept of WLB, including different kinds of care and caregivers' roles and responsibilities. It highlights the differences between women and men within care in order to demonstrate why a gender perspective is important for WLB.
- An overview of legislative measures in place for WLB in the European Union.
- An overview of the policy and financial levers in place for WLB.

2.1. The concept of WLB

Box 1. The concept of WLB

WLB is about striking a balance between 'work' and 'life'. Here, 'work' means paid work, and 'life' means everything else – including, but not limited to, unpaid work, domestic work (cleaning, cooking, washing, etc.), care work (taking care of children, older people, people who are ill, persons living with disabilities and oneself), leisure time and social activities.

Addressing the gendered care norms that affect women's opportunities for paid work, career advancement and pensions contributions is a legitimate goal in its own right – vital for achieving gender equality, women's economic, social and political rights, and sustainable growth. Yet, as a concept in EU policy documents, WLB tends to be framed as an issue of sustaining economic growth in the EU and its Member States. This is based on the understanding that improving women's economic status through labour market participation contributes both to greater growth, and to economic equality between women and men.

Reconstructing gender relations by addressing the societal norms that affect men's contribution

to care and domestic labour are also part of the policy discourse on WLB. Recognition of the need to change both structures and behaviours to increase men's participation in care are often central to the articulation of legislative and non-legislative measures for WLB.

It is difficult to discuss WLB without discussing 'care' – an inherent part of the WLB concept. But what is care?

Box 2. Definition of care

What is care?

Care is a concept that encompasses the processes of creating, sustaining and reproducing people, selves and social relationships on three levels: (1) caring for the self, (2) caring for others and (3) caring for the world ⁽²²⁾.

It is worth asking how we care for ourselves and for others. What values do we, as a society and as the EU, ascribe to care work? While care is fundamental for our survival and sustainability, the 'right to care' has not been a specific EU policy objective so far ⁽²³⁾. Care tends to be presented as something only needed by the 'needy' – children, the ill, older people and/or persons living with disabilities ⁽²⁴⁾. Yet, the survival of all human beings depends on care. At different stages of our lives, we may be more dependent on care.

2.2. Different types of care work in current ESIF interventions

Informal care is typically understood as unpaid labour undertaken in the private realm of the household, usually as part of an already existing social relationship of kinship, marital relations, friendship or

⁽²²⁾ Tronto, 2013.

⁽²³⁾ Busby, N. (2018), 'The evolution of gender equality and related employment policies – the case of work-family reconciliation', *International Journal of Discrimination and the Law*, Vol. 18, Nos 2-3, pp. 104-123.

⁽²⁴⁾ Nguyen, Zavoretti and Tronto, 2017.

neighbourliness⁽²⁵⁾. Formal care is defined as paid labour performed by professional care workers in the public domain and based on contractual relationships⁽²⁶⁾. The distinction between formal and informal care is becoming increasingly blurred⁽²⁷⁾. Cash benefits for care recipients and/or carers are one factor contributing to the blurred distinction⁽²⁸⁾. Some authors claim that as long as it is based on emotional or kinship obligations, paid care can still be considered as informal care⁽²⁹⁾.

To achieve an ‘adult worker’ model, rather than the endurance of a ‘male breadwinner’ model, the gendered division of labour needs to be addressed as a social, political and economic concern⁽³⁰⁾.

It is fundamental to analyse and consider ‘who is the carer’ in order to strike a balance between

men’s and women’s care responsibilities. As family members are under growing pressure to provide care, this most often means that women reduce their working hours, leave paid employment or continue to remain outside the paid labour market. It also means that more and more older people are caring for older spouses, yielding significant care pressures across the life span.

EIGE’s Gender Equality Index (2017) reveals that far fewer women than men participate in paid work, far more women than men work part-time, and women perform most of the care and domestic work across the EU. It is worth noting that a high number of women migrants work in the EU’s informal care sector, looking after children, older people, people who are ill and persons living with disabilities⁽³¹⁾.

Table 1. Employment rate and care-related time use in selected Member States

Country	Employment rates	Care-related time use (for women and men aged 25–49)
Czechia	<ul style="list-style-type: none"> The full-time equivalent employment rate is 46 % for women and 65 % for men. 10 % of women work part-time, as do 3 % of men. 	<ul style="list-style-type: none"> 33 % of women care for family members for at least 1 hour per day, compared to 20 % of men. 86 % of women and 12 % of men cook and do housework every day.
Germany	<ul style="list-style-type: none"> The full-time equivalent employment rate is 40 % for women and 59 % for men. 47 % of women work part-time, as do 11 % of men. 	<ul style="list-style-type: none"> 50 % of women care for family members for 1 hour or more per day, compared to 30 % of men. 72 % of women and 29 % of men cook and do housework every day.
Estonia	<ul style="list-style-type: none"> The full-time equivalent employment rate is 50 % for women and 64 % for men. 15 % of women work part-time, as do 7 % of men. 	<ul style="list-style-type: none"> 35 % of women care for family members for at least 1 hour per day, compared to 31 % of men. 76 % of women and 45 % of men cook and do housework every day.
Spain	<ul style="list-style-type: none"> The full-time equivalent employment rate is 36 % for women and 50 % for men. 25 % of women work part-time, as do 8 % of men. 	<ul style="list-style-type: none"> 56 % of women care for family members for 1 hour or more per day, compared to 36 % of men. 85 % of women and 42 % of men cook and do housework every day.

Source: EIGE, 2017h.

⁽²⁵⁾ OECD, 2005; Triantafillou et al., 2011; Barnes, 2012.

⁽²⁶⁾ Ungerson, 1995; Triantafillou et al., 2011.

⁽²⁷⁾ Triantafillou et al., 2011.

⁽²⁸⁾ Ungerson, 1995.

⁽²⁹⁾ Lundsgaard, J. (2005), ‘Consumer direction and choice in long-term care for older persons, including payments for informal care – how can it help improve care outcomes, employment and fiscal sustainability?’, *OECD Health Working Papers*, No 20, OECD Publishing, Paris. Available at: [//doi.org/10.1787/616882407515](https://doi.org/10.1787/616882407515)

⁽³⁰⁾ Guerrina, R. (2015), ‘Socio-economic challenges to work–life balance at times of crisis’, *Journal of Social Welfare and Family Law*, Vol. 37, pp. 368–377. Available at: <https://core.ac.uk/download/pdf/30342196.pdf>

⁽³¹⁾ Orozco, A. (2010), *Global Care Chains – Toward a rights-based global care regime?*, United Nations International Research and Training Institute for the Advancement of Women, Santo Domingo. Available at: <https://trainingcentre.unwomen.org/instraw-library/2010-R-MIG-GLO-GLO-EN.pdf>; Nguyen, Zavoretti and Tronto, 2017.

Childcare

Access to affordable, quality childcare continues to be one of the most significant barriers to women's labour market participation and to redressing the gendered norms that maintain women's status as second earners and principle carers ⁽³²⁾.

The [Barcelona targets on childcare](#) were introduced in 2002, following a decision by the European Council to set targets for formal childcare. This is a specific measure to remove disincentives to women's labour market participation by addressing insufficient childcare facilities. Member States agreed, by 2010, to provide childcare for at least 90 % of children between the ages of three and the mandatory school age, and for at least 33 % of children under three.

Since then, Member States have made variable

progress towards achieving the Barcelona targets. Data in 2018 show that at least 95 % of 4-year-olds are enrolled in early childcare and compulsory education, although participation rates for children under the age of three are significantly lower. Overall, however, the targets are being met. In 2016, 32.9 % of children up to 3 years old were cared for by formal arrangements – 15 % received between 1 and 29 hours of formal childcare per week, while 17.9 % received more than 30 hours per week. Compared to 2010, this is an increase of 4.9 percentage points, with 14 % accessing both 1–29 hours and over 30 hours of formal childcare per week. This means the second objective was almost reached by 2016 at the EU level ⁽³³⁾.

Although Member States have advanced towards these targets, there are significant variations between them.

Table 2. Childcare provision in selected Member States

Country	Childcare provision ⁽³⁴⁾
Czechia	78 % of children between the age of three and school age, and 3 % of children under the age of three, are enrolled in childcare.
Germany	90 % of children between the age of three and school age, and 26 % of children under the age of three, are enrolled in childcare.
Estonia	93 % of children between the age of three and school age, and 21 % of children under the age of three, are enrolled in childcare.
Spain	92 % of children between the age of three and school age, and 40 % of children under the age of three, are enrolled in childcare.

Source: EIGE, 2017h.

Caring for older people

Alongside adequate childcare provision, which is key for parents and carers, the ageing population presents additional demands on family members, as reflected most acutely in women's time use patterns.

The workforce in the European Union is shrinking. The population is ageing at the same time as the demographic curve remains a challenge ⁽³⁵⁾. An older population presents a number of challenges to WLB

for people in work or those wishing to access paid employment.

Moreover, older workers who are no longer in paid employment – both women and men – are increasingly becoming informal carers for their grandchildren. This impacts their economic status, time use and social status.

Older people are also in need of increasing amounts of home-based care, as social services – such as care and residential centres – have been adversely

⁽³²⁾ European Parliament (2016a), Report on poverty: a gender perspective (2015/2228(INI)), Committee on Women's Rights and Gender Equality. Available at: <http://www.europarl.europa.eu/sides/getDoc.do?pubRef=-//EP//TEXT+REPORT+A8-2016-0153+0+DOC+XML+V0//EN>

⁽³³⁾ Eurostat (2018a), *Smarter, Greener, More Inclusive? – Indicators to support the Europe 2020 strategy – 2018 edition*, Publications Office of the European Union, Luxembourg. Available at: <https://ec.europa.eu/eurostat/documents/3217494/9087772/KS-02-18-728-EN-N.pdf/3f01e3c4-1c01-4036-bd6a-814dec66c58c>

⁽³⁴⁾ EIGE, 2017h.

⁽³⁵⁾ European Commission (2017), COM(2017) 252 final.

affected by reduced levels of public spending at the Member State and regional levels. Home-based care is promoted as a preferable care model to

institutions, whenever applicable, in line with the [UN Convention on the Rights of Persons with Disabilities](#).

Box 3. Older people's dedication to care

Almost 27 % of women across the EU provide 20 hours or more of informal care each week. This rate ranges from 57 % of women in Spain – the highest level in the EU – to 3.2 % in the Netherlands. Over half (51 %) of the women in Spain who provide over 20 hours of informal care per week are 45–54 years old, 57 % are 55–64 years old and almost 70 % are aged 65–74. Some 72 % of women over the age of 75 provide more than 20 hours of care each week.

The pressure on older workers and reliance on older people – women and men – as informal carers is undeniable. In Estonia, for example, just under 40 % of men over the age of 75 provide 20 hours or more of care per week, as do 74.4 % of women of the same age. These trends demonstrate the overwhelming reliance on older people to provide care in the EU ⁽³⁶⁾. However, measures that respond to this type of stress are not clearly visible in ESIF programmes.

From a public policy perspective, the evidence of financing for active ageing programmes is limited. For example, an assessment of ESF and ERDF funding for WLB in Czechia, Germany, Estonia and Spain ⁽³⁷⁾ found no evidence of funding for active ageing programmes. Such programmes would help people to remain active as they grow older, as they would support health promotion and disease prevention policies. Despite this, they are not regularly implemented across Member States, nor is there any apparent consistent response to relevant demographic data. The high level of care provided by older workers for family members is not reflected in support measures and activities for labour market, social inclusion or investment

in care facilities financed under the ESF or ERDF. Overall, there is a limited response to the needs of older workers and little investment in eldercare ⁽³⁸⁾.

The pressure of an ageing population also impacts global care chains, as women from Africa, Asia and South America travel to work as carers in Europe. They largely assume informal care jobs, looking after children, older people, people who are ill and persons living with disabilities ⁽³⁹⁾. These women often do not have legal work permits, hindering their access to favourable working conditions or salaries ⁽⁴⁰⁾. This increases pressure on migrant women workers, for whom support provided within national social protection policies or ESIF-funded interventions can be limited.

⁽³⁶⁾ EU Open Data Portal, 'Persons providing informal care or assistance by sex, age, degree of urbanisation, most frequent activity status and frequency', Eurostat data set. Available at: <https://data.europa.eu/euodp/data/dataset/lxBtFqcu6Jg41urZQ2bZWA>

⁽³⁷⁾ EIGE conducted a gender assessment of ESIF programmes in 11 Member States. In addition, to get a more in-depth understanding on the use of the ESF and the ERDF to promote work–life balance in the European Union, EIGE conducted four country case studies in Czechia, Germany, Estonia and Spain. The selection criteria for Member States took into account a range of elements – how long they have been part of the EU; the character of the welfare state – i.e. familial, dual or adult earner models; levels of ESIF investment; and the ESIF's contribution to interventions on 'infrastructure for early childhood education and care' (IC052) under social, health and education infrastructure and related investments. All four countries plan to dedicate a considerable share of their funds to this category of interventions – a category selected as a focus for this report because:

- access to affordable, quality childcare continues to constrain women's labour market participation and challenges efforts to redress gendered norms that relegate women to the position of second earners and principal carers;
- in budgetary terms, this is a main investment category for both the ESF and ERDF.

⁽³⁸⁾ Eurostat, 'Formal child care by duration and age group'. Available at: <https://ec.europa.eu/eurostat/tgm/table.do?tab=table&plugin=1&language=en&pcode=tps00185>

⁽³⁹⁾ Orozco, 2010;
Nguyen, Zavoretti and Tronto, 2017.

⁽⁴⁰⁾ European Union Agency for Fundamental Rights (2017), *Out of sight: Migrant women exploited in domestic work*, Publications Office of the European Union. Available at: https://fra.europa.eu/sites/default/files/fra_uploads/fra-2018-migrant-women-labour-exploitation-domestic-work_en.pdf

Box 4. Global care chains – an example to explain the concept

Juana arrived in Spain in 2005. Her children stayed behind with her husband in Bolivia, making theirs a transnational family. He followed a few months later, but did not assume the role of primary caregiver. In Bolivia, masculine identity is closely linked to the role of income provider.

Both Juana and her husband managed to secure work. She became a domestic worker – a typical niche in the Spanish labour market for women. Her children lived first with their maternal grandparents, but Juana was not happy with this state of affairs. She agreed with her sister-in-law that she would move home – a clear reorganisation of family strategies.

When the couple achieved a certain level of job security, they wanted their children to join them in Spain while their children were still beneficiaries of family reunification procedures – an example of family strategies affected by migration policy. Their children were twice turned away at the airport. Only the eldest managed to enter – a case of family reunification. As Juana required papers, she and her son moved to another city where she had organised a contract – reflecting how labour strategies are affected by migration policy. While she cared for an elderly woman at night, her son remained at home alone – reflecting the difficulties migrant women workers face in balancing work and family life. Juana feels the situation is unsustainable ⁽⁴¹⁾.

Care for persons living with disabilities

The complexity of caring for persons living with disabilities, and supporting families with children living with disabilities, is not consistently visible in interventions under ESIF programmes and their funding categories. Actions to support people living in vulnerable conditions are prominent. However, there are limited interventions that recognise exclusion, vulnerability to poverty, distance from the labour market and social participation for persons with disabilities and their families/primary carers. This type of support is important due to the high pressure on individuals caring for family members living with disabilities. Such intense care work negatively influences the opportunities for carers – most of whom are women – to take part in other activities, including other forms of remunerated labour, social events and political or community engagement.

2.3. Legislative levers for WLB

In an attempt to broaden the understanding of gender roles, in June 2018, the EU issued a new [directive on WLB](#), featuring legislative and non-legislative measures. The new directive includes provisions

for paternity, parental and carers' leave.

This directive represents a major driver for improved WLB for women and men across the EU. Legislative measures to increase men's and fathers' care responsibilities include:

- the introduction of paternity leave, whereby fathers/equivalent second parents will be able to take at least 10 working days of paternity leave upon a child's birth, which will be compensated to at least at the level of sick pay;
- strengthening of the existing right to 4 months of parental leave by making two of these months non-transferable from one parent to another, which will be compensated at a level decided upon by the Member State.

This political action responds to uneven progress among Member States and a 'general trend of decline since 2011' ⁽⁴²⁾. To date, as Ghailani's ⁽⁴³⁾ analysis from early 2018 demonstrates (see Table 3 ⁽⁴⁴⁾), there is considerable variation across Member States in terms of the nature and level of the provision of legislative measures to support WLB through paid leave and time off for family care.

⁽⁴¹⁾ Orozco, 2010.

⁽⁴²⁾ Milotay, N. (2019), 'Briefing – EU legislation in progress – A new directive on work-life balance', European Parliamentary Research Service, p. 1. Available at: [http://www.europarl.europa.eu/RegData/etudes/BRIE/2018/614708/EPRS_BRI\(2018\)614708_EN.pdf](http://www.europarl.europa.eu/RegData/etudes/BRIE/2018/614708/EPRS_BRI(2018)614708_EN.pdf)

⁽⁴³⁾ Ghailani, D. (2018), 'Brief overview of measures related to work-life balance in the European Union – country sheets', European Social Observatory deliverable, European Social Observatory.

⁽⁴⁴⁾ Please note that the last two 'No' and 'Partially' results for Sweden are regulated under social agreements between employers and union, rather than by law in Sweden. Therefore, these should be considered to signify 'Yes'.

Table 3. Member States' compliance with the proposed directive

Proposals	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	HR	IT	CY	LV	LT	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	Total Y	
Paternity leave																														
10 working days	Y	Y	N	Y	N	Y	Y	P ¹	Y	Y	N	P ¹	N	P ¹	Y	P ¹	P ¹	P ¹	P ¹	N	Y	Y	P ¹	Y	N	Y	Y	Y	14	
Paid at sick pay level	Y	Y	N	Y	N	Y	Y	Y	Y	Y	N	Y	N	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	N	Y	Y	Y	22	
Parental leave																														
4 months non-transferable	Y	N	Y	N	Y	N	Y	Y	Y	Y	N	Y	Y	N	N	Y	N	P ³	Y	N	N	P ¹	N	N	N	N	N	Y	Y	13
Child age 12	Y	N	N	N	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	Y	4
Paid at sick pay level	P ⁵	P ⁵	Y	Y	P ⁵	Y	N	N	N	P ⁵	Y	N	N	P ⁵	Y	Y	Y	N	N	Y	Y	P ⁵	Y	Y	P ⁵	Y	Y	N	13	
Flexible use	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	N	Y	N	Y	Y	Y	24
Carers' leave																														
5 days a year	P ³	Y	Y	P ¹	Y	Y	P ¹	Y	P ¹	P ³	Y	Y	Y	Y	Y	P ¹	Y	P ¹	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	P ¹	19
Paid at sick pay level	P ³	Y	Y	Y	Y	Y	Y	P ¹	Y	N	Y	P ¹	N	N	Y	Y	Y	N	Y	Y	Y	P ¹	N	Y	Y	Y	Y	Y	N	18
Flexible working arrangements																														
Right to request flexible use	Y	P ²	Y	Y	N	N	N	N	N	N	Y	N	N	N	N	P ³	N	P ³	Y	Y	N	Y	N	N	N	N	N	N	Y	8
Right to request telework	N	P ²	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	P ³	Y	N	N	P ²	N	Y	N	N	N	N	Y	3
Right to request reduced hours	Y	P ²	Y	Y	P ²	N	Y	P ²	Y	Y	P ²	P ¹	N	Y	Y	P ³	P ²	P ³	Y	P ²	P ²	P ²	N	P ²	Y	P ¹	P ²	Y	11	

Source: Ghailani, 2018.

NB: the P¹⁻⁵ distinctions included in this table are as follows.

P¹: the duration is shorter than that proposed by the directive, or it is not specified (e.g. as in the United Kingdom).

P²: available for parents of children up to a certain age, but under the age of 12.

P³: only for the private or public sector.

P⁴: workers have the right to carers' leave of less than 5 working days per year.

P⁵: leave is paid but not at the level of the sickness benefit.

In an attempt to reconceptualise WLB and embrace a transformative approach to gender equality⁽⁴⁵⁾, the new directive is framed as a measure for non-discrimination and gender equality. It aims to specifically address unequal labour market opportunities and experiences for women. The directive is framed within the principles of the European Pillar of Social Rights, with the focus being on citizens' rights as opposed to economic growth.

It has to be noted that one of the [European Pillar of Social Rights' deliverables](#) is the 'New Start' initiative to address the challenges faced by working parents and carers. Among the pillar's 20 principles is the principle of WLB whereby:

Parents and people with caring responsibilities have the right to suitable leave, flexible working arrangements and access to care services. Women and men shall have equal access to special leaves of absence in order to fulfil their caring responsibilities and be encouraged to use them in a balanced way (principle 9).

The new directive seeks to support women's economic and social rights by addressing unequal treatment in the labour market and the unequal division of care between women and men⁽⁴⁶⁾. It

also aspires to strengthen and remedy previous 'patchwork' provisions to address the inequitable gender relations at the heart of women's and men's unequal engagement in care provision.

2.4. Policy and finance levers for WLB

The European Commission's Strategic Engagement for Gender Equality 2016–2019 specifically addresses WLB by calling for action by Member States on objectives related to increasing women's labour market participation and ensuring the equal economic independence of women and men⁽⁴⁷⁾. These actions focus on coordinated efforts to facilitate women's labour market participation in order to achieve the EU target of 75 % of women and men in employment by 2020, and to close the gender gap in employment. Specific actions must involve 'making it easier to balance caring and professional responsibilities [and] a more equal sharing of time spent on care and household responsibilities'⁽⁴⁸⁾. Thus, women's increased labour market participation is a goal of both EU economic growth policy, as well as of the social rights agenda of the EU institutions and Members States.

Box 5. First goal of the Strategic Engagement for Gender Equality⁽⁴⁹⁾

Increase female labour market participation and the equal economic independence of women and men.

Objectives

- Reach the EU target of 75 % of men and women in employment in 2020 and close the employment gap for women.
- More equal sharing between women and men of time spent on care and household responsibilities and improved possibilities for balancing caring and professional responsibilities.
- Attainment of the Barcelona targets on childcare and consider serious reflection with Member States on possible ways of making them more ambitious and extending them to cover care of other dependants.
- Promotion of female entrepreneurship and gender equality in research.
- Better labour market integration of migrant women.

⁽⁴⁵⁾ Caracciolo di Torella, E. (2017), 'An emerging right to care in the EU – a "new start to support work–life balance for parents and carers"', *ERA Forum*, Vol. 18, pp. 187–198. Available at: <https://doi.org/10.1007/s12027-017-0477-0>

⁽⁴⁶⁾ Milotay, 2019.

⁽⁴⁷⁾ European Commission (2016a), *Strategic Engagement for Gender Equality 2016–2019*, Publications Office of the European Union, Luxembourg. Available at: https://ec.europa.eu/info/sites/info/files/strategic_engagement_en.pdf

⁽⁴⁸⁾ *Ibid*, p. 10.

⁽⁴⁹⁾ *Ibid*.

Key actions to meet the objectives of the Strategic Engagement for Gender Equality 2016–2019 include a clear focus on women’s employment. They also focus on addressing the WLB challenges faced by working parents and carers ⁽⁵⁰⁾.

Actions to achieve these objectives overlap significantly with proposed interventions for the next round of the ESF+ and ERDF included in the Commission’s proposed regulations. These actions are as follows, with overlaps highlighted in blue:

- modernising the current EU legal framework to ensure better enforcement and, where appropriate, adapting legislation in the areas of leave and flexible working arrangements, in consultation with the social partners, **to provide better WLB for parents and people with caring responsibilities** ⁽⁵¹⁾;
- setting out a broad policy framework to support parents’ participation in the labour market and **a more equal use of leave and flexible work arrangements** ⁽⁵²⁾, including considering possible benchmarking, the **targeted use of EU financial tools to support Member States** and awareness raising;
- continued **monitoring and support for Member States to attain the Barcelona targets on childcare** ⁽⁵³⁾;
- taking into account the results of a public consultation on WLB ⁽⁵⁴⁾, considering consultation with Member States and stakeholders on **how to make the Barcelona targets more ambitious and considering a more comprehensive approach, e.g. covering care of other dependants, accessibility and quality**;
- supporting Member States in their **efforts to increase women’s labour market participation**, close monitoring of **national reform measures**

under the European semester in line with the employment guidelines ⁽⁵⁵⁾ and issuing country-specific recommendations where necessary;

- further **supporting companies in their efforts to increase women’s labour market participation by facilitating diversity charter platforms** ⁽⁵⁶⁾;
- integrating a gender perspective into the implementation of the European Agenda on Migration ⁽⁵⁷⁾, while **addressing barriers to the employment and career progression of migrant women** and helping Member States **to make full use of the possibilities offered by the ESF+ in this area** ⁽⁵⁸⁾;
- awareness raising to **promote women’s entrepreneurship**, including through the launch of an e-platform for women entrepreneurs (2016), the creation of a European Network of Women Business Angels (2016) and the Network of Women’s Web Entrepreneurs Hubs ⁽⁵⁹⁾;
- promoting **institutional change in research organisations to remove barriers to gender equality and engage all research organisations to implement gender equality plans** ⁽⁶⁰⁾.

Managing authorities can use this set of actions as a framework for mapping the proposed interventions under the ESF+ and ERDF. It may also be used as the basis for a model for programme and project formulation and evaluation.

These specific interventions form part of wider actions at Member States’ national and sub-national levels to support paid transfers and periods of leave for family care. They reinforce the need to consider and apply legislative, policy and financial levers to reconcile work–life inequalities through an innovative process of applying a gendered analysis to a wide range of possible actions within ERDF and ESF+ programmes. Such actions include

⁽⁵⁰⁾ European Commission (2015a), ‘Roadmap – New start to address the challenges of work–life balance faced by working families’. Available at: http://ec.europa.eu/smart-regulation/roadmaps/docs/2015_just_012_new_initiative_replacing_maternity_leave_directive_en.pdf

⁽⁵¹⁾ ESF+ regulation (European Commission (2018g), COM(2018) 382 final).

⁽⁵²⁾ *Ibid.*

⁽⁵³⁾ European Commission (2018a), ‘Barcelona Objectives’. Available at: https://ec.europa.eu/info/sites/info/files/bcn_objectives-report2018_web_en.pdf

⁽⁵⁴⁾ European Commission (2015d), Consultation document – First phase consultation of social partners under Article 154 TFEU on possible action addressing the challenges of work–life balance faced by working parents and caregivers, C(2015) 7754 final.

⁽⁵⁵⁾ Adopted by the Employment, Social Policy, Health and Consumer Affairs Council on 5 October 2015.

⁽⁵⁶⁾ European Commission, ‘Tackling discrimination’. Available at: http://ec.europa.eu/justice/discrimination/diversity/index_en.htm

⁽⁵⁷⁾ European Commission (2015b), Commission communication – A European agenda on migration, COM(2015) 240 final. Available at: https://ec.europa.eu/anti-trafficking/sites/antitrafficking/files/communication_on_the_european_agenda_on_migration_en.pdf

⁽⁵⁸⁾ ESF+ regulation (European Commission (2018g), COM(2018) 382 final).

⁽⁵⁹⁾ ERDF and Cohesion Fund specific regulation (European Commission (2018d), COM(2018) 372 final).

⁽⁶⁰⁾ ESF+ regulation (European Commission (2018), COM(2018g) 382 final).

transport, environmental policies, the expansion of information and communications technology (ICT) and digital technology, business start-ups and support for small and medium-sized enterprises (SMEs), the development of industry clusters, and investment in care facilities, training and developing a social care workforce.

A gender-sensitive framework for financing WLB and advancing gender equality requires gender analysis and gender-aware actions across multiple dimensions, including:

- women's and men's time use, including leisure time and time for self-care;
- women's and men's access to skills and training;
- women's and men's access to flexible, quality employment;
- access to affordable, flexible, quality services for children;
- access to affordable, flexible, quality services for older people;
- access to affordable, flexible, quality services for adults and children living with disabilities;
- flexible, gender-aware, employment practices;
- women's and men's access to paid leave for parents and carers.

2.4.1. Financial levers for WLB

In terms of budgets, overall, EU funding allocated to gender equality for the 2014–2020 period totals EUR 6.17 billion ⁽⁶¹⁾. This represents approximately 0.6 % of all EU funds, as stipulated by overall commitment appropriations ⁽⁶²⁾.

In pursuit of gender equality objectives, the ESIF, particularly the ESF and ERDF, are key financial levers for the promotion of equality between women and men ⁽⁶³⁾. It is estimated that approximately EUR 5.85 billion will be spent in 2014–2020 on measures promoting gender equality. This is roughly 1 % of the total ESIF budget and 1.3 % of the EU contribution to the ESIF ⁽⁶⁴⁾.

Of the EUR 5.85 billion, approximately EUR 1.25 billion (0.6 % of the total ERDF budget for this period) is allocated within the ERDF for 'investment in childcare infrastructure', while EUR 4.6 billion (5.3 % of the total ESF budget for this period) within ESF spending in 2014–2020 is programmed for gender equality. Of this ESF funding, EUR 1.6 billion is allocated under the investment priority selected by 12 Member States ⁽⁶⁵⁾ on 'equality between men and women in all areas, including in access to employment, career progression, reconciliation of work and private life and promotion of equal pay for equal work' ⁽⁶⁶⁾.

⁽⁶¹⁾ Based on European Commission (2016a), which includes budgetary findings from 2015, and European Commission (2013), *Multiannual Financial Framework 2014–2020 and EU Budget 2014 – The figures*, Publications Office of the European Union, Luxembourg (available at: <https://publications.europa.eu/en/publication-detail/-/publication/d2cf202e-f36a-45b2-84e7-1ac6ad996e90>). See also European Parliament (2016b), *The Use of Funds for Gender Equality in Selected Member States – Study for the FEMM Committee*, research paper by the Directorate-General for Internal Policies, Publications Office of the European Union (available at: [http://www.europarl.europa.eu/RegData/etudes/STUD/2016/571393/IPOL_STU\(2016\)571393_EN.pdf](http://www.europarl.europa.eu/RegData/etudes/STUD/2016/571393/IPOL_STU(2016)571393_EN.pdf)).

⁽⁶²⁾ European Parliament, 2016b.

⁽⁶³⁾ The ESIF, including the ESF and ERDF, are considered key investment instruments for supporting EU policy priorities. This is repeated in multiple sources, including European Commission (2016a); Council (2011), Council conclusions of 7 March 2011 on European Pact for Gender Equality (2011–2020), 2011/C 155/02 (available at: <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A52011XG0525%2801%29>); European Commission (2010b), Commission Communication – Strategy for equality between women and men 2010–2015, COM(2010) 491 final (available at: <https://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2010:0491:FIN:EN:PDF>); European Parliament (2015), European Parliament resolution of 9 June 2015 on the EU strategy for equality between women and men post 2015 (2014/2152(INI)) (available at: http://www.europarl.europa.eu/doceo/document/TA-8-2015-0218_EN.html?redirect); and European Parliament and Council (2019), Directive (EU) 2019/1158 of the European Parliament and of the Council of 20 June 2019 on work–life balance for parents and carers and repealing Council Directive 2010/18/EU (available at: https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=uriserv:OJ.L_.2019.188.01.0079.01.ENG).

⁽⁶⁴⁾ The total ESIF budget amounts to at least EUR 637 billion and the EU contribution is EUR 454 billion. The calculations are based on these figures. However, the total budget could be higher, in which case the percentage would be lower. For more information, see: European Commission (2015c), Commission communication – Investing in jobs and growth – maximising the contribution of European Structural and Investment Funds, COM(2015) 639 final (available at: https://ec.europa.eu/regional_policy/sources/policy/what/investment-policy/esif-contribution/esif_contribution_communication.pdf) and European Commission, 'Contribution of the European Structural and Investment Funds to jobs and growth, the investment plan and the Commission's priorities' (available at: https://ec.europa.eu/regional_policy/en/policy/what/investment-policy/esif-contribution/).

⁽⁶⁵⁾ Czechia, Germany, Estonia, Greece, Italy, Hungary, Austria, Poland, Portugal, Slovakia, Finland and the United Kingdom.

⁽⁶⁶⁾ European Parliament, 2016b.

Using 2018 data, EIGE's research shows that gender equality measures are not financed to the same extent as other intervention measures. When calculating the potential contribution to gender

equality objectives in the ESIF, it was found that budget allocations for gender equality measures represent less than 1 % of the ERDF, Cohesion Fund (CF) and ESF budgets reviewed ⁽⁶⁷⁾.

Box 6. Project spending on gender equality in the ESIF 2014–2020

Approximately EUR 5.85 billion will be spent in 2014–2020 on measures to promote gender equality, equivalent to around 1.3 % of overall ESIF funding for the period.

Of this sum, approximately EUR 4.6 billion will be spent under the ESF (5.3 % of the total ESF budget for 2014–2020), while approximately EUR 1.25 billion will be spent under the ERDF (0.6 % of the total ERDF budget for this period). EUR 1.6 billion of ESF funding is programmed under the investment priority that directly addresses gender equality (thematic objective 8 and investment priority 8iv), selected by 12 Member States: Czechia, Germany, Estonia, Greece, Italy, Hungary, Austria, Poland, Portugal, Slovakia, Finland and the United Kingdom.

ERDF funding is programmed for investment in childcare and other social infrastructure that support WLB among women and men with care responsibilities, while promoting women's employment. Under the 'migration' priority 2014–2020, the ERDF will also support measures to integrate migrants and asylum seekers through investments in infrastructure related to social services, health, education and housing, including childcare infrastructure.

As noted above, EIGE's research shows that planned budget allocations for gender equality measures represent less than 1 % of the ERDF, CF and ESF budgets. However, it is also clear that it is extremely difficult to identify budget allocations for gender equality in the ESIF. Even when excluding interventions assumed to be gender blind, the budget shares of interventions that are potentially relevant for gender equality do not provide evidence of the tangible contribution of the ESIF's support for gender equality objectives or gender-sensitive implementation. Instead, only the share of budgets which might contribute positively if implemented appropriately is suggested.

In order to track progress on implementing gender mainstreaming and supporting gender equality objectives, more precise requirements would have to be included in terms of specific programme

objectives throughout established priority axes (especially in programmes beyond the ESF). More concrete information about gender-responsive interventions, and the budgets (planned contributions) allocated for these interventions and overall gender mainstreaming activities are also needed ⁽⁶⁸⁾.

Expenditure tracking systems allow for a broad assessment of funding allocations within investment platforms and related public budgets. Existing ESIF expenditure tracking systems are generally specific to each individual fund and to the types of interventions assessed. Thus, EIGE developed a model to build on the existing climate change ⁽⁶⁹⁾ and biodiversity ⁽⁷⁰⁾ spending tracking system within the ESIF. As a tracking system that focuses on gender equality, EIGE's model considers the complexity of interventions' principle topics, where a multi-sectoral approach is often applied.

⁽⁶⁷⁾ EIGE, 2019. In total, 51 OPs were reviewed across the 11 selected countries. This review includes the most recently available annual implementation report for each OP.

⁽⁶⁸⁾ *Ibid.*

⁽⁶⁹⁾ European Commission (2016b), *Tracking Climate Expenditure – The common methodology for tracking and monitoring climate expenditure under the European Structural and Investment Funds (2014–2020)*, Publications Office of the European Union. Available at: https://ec.europa.eu/clima/sites/clima/files/docs/tracking_climate_expenditure_en.pdf

⁽⁷⁰⁾ Medarova-Bergstrom, K., Kettunen, M., Rayment, M., Skinner, I. and Tucker, G. (2014), 'Common framework for biodiversity-proofing of the EU budget – general guidance', report to the European Commission, Institute for European Environmental Policy, London. Available at: <https://ec.europa.eu/environment/nature/biodiversity/comm2006/pdf/cfbp%20-%20General%20Guidance.pdf>

Box 7. How can gender mainstreaming be tracked in the EU Funds?

- Tracking systems assign weights to budget allocations according to their impact on policy objectives. This allows for overall comparisons of the share of budgets geared towards specific objectives.
- EIGE's system to track gender equality spending across all EU Funds programmes assesses and weighs individual interventions according to their supposed impact on gender equality objectives.

3. Social care investments: the economic case for investments in WLB

This section offers the following.

- A brief exploration of the economic case for investing in WLB by framing it and the provision of care facilities and services – childcare, care for older people and social care – as forms of economic infrastructure.
- achieving social justice between women and men in all their diversity, considering not only gender, but also age, education, nationality, race, ethnicity, disability, socioeconomic status and other factors.

3.1. Social and economic infrastructure and WLB

Thus far, this model has discussed WLB as a mechanism for:

- boosting women's labour market participation and economic independence, thereby contributing to economic growth;
- achieving gender equality, both within the formal labour market and within the informal non-remunerated sector, encompassing non-remunerated care work;

We now turn to social and economic infrastructure in relation to WLB. '[economic] infrastructure is defined as the set of goods and services that are needed for a society to operate and as such its benefits reach beyond its pool of direct users' (71). It is typically considered to be physical, such as buildings and the construction of buildings, bridges, roads, houses and railways.

Social infrastructure refers to all the services that provide education, care and health, including care for older people and persons living with disabilities, as well as childcare. This approach to social infrastructure includes the skilled workforce providing care services, in addition to the physical facilities or 'infrastructure' where care services are provided.

Box 8. Applying a gender perspective to physical infrastructure

Can building a road, establishing a recycling centre and/or expanding public transportation services promote gender equality? Yes, they can. Therefore, a gender perspective needs to be considered in physical infrastructure.

Living in an area with poor roads and limited public transport often has more of a negative effect on women and girls than on men and boys. This is due to their roles and responsibilities in society. For example, women tend to be responsible for managing recycling. Similarly, having to walk long distances to access public transport at night implies different safety issues for women and girls – issues that men and boys do not face to the same extent. The cost of commuting in the absence of efficient, safe and affordable public transport may prevent women from accessing the labour market, taking up better paid jobs or working at night.

Analysing how and why women and men use physical infrastructure, while recalling gendered care norms, can inform vital changes. For instance, women in the EU are more likely to be employed part-time and perform the bulk of unpaid care work. Women also spend less time on leisure and sporting activities and are more likely to use public transport and care for young children.

(71) UK Women's Budget Group (2018), p. 38.

Carers, who are predominantly women, would consequently benefit more from buses with lowering platforms and dedicated spaces for prams. Bus routes with stops close to schools, nurseries, workplaces and shops would also help. These adjustments can make life easier for users of public transport, particularly when travelling with children. This can increase mobility and decrease social isolation ⁽⁷²⁾.

The UK Women's Budget Group carried out research on the impact of government spending on social infrastructure, focused on seven high-income countries. Their analysis ⁽⁷³⁾ reveals that social infrastructure investment maximises labour and other resources, resulting in higher productivity and growth rates. Public investment in childcare directly creates jobs in the sector. In addition, 'multiplier effects' create employment in supply and service industries. Increased levels of employment as a result of such overall expansion mean higher household incomes. These, in turn, are used to purchase goods and services from across the economy.

The UK Women's Budget Group analysis ⁽⁷⁴⁾ exposes significant benefits from investing 2 % of gross domestic product in the care sector. Such investments would create new care-related jobs – up to 2 million in Germany, 1.5 million in the United Kingdom and 1 million in Italy. These new jobs would increase women's and men's employment, while contributing to a reduction in the gender gap in employment.

Crucially, such investments would work in a way that investment in construction alone would not. In essence, more construction-related jobs would only generate roughly half the number of jobs that social investments stand to create, and these would not decrease the gender gap. Investments in social infrastructure, by contrast, would decrease the gender gap, while simultaneously impacting other

inequality gaps connected to different socio-demographic characteristics – for example between EU nationals and people from other countries. Furthermore, investments in both childcare and social care would help to tackle some of the central economic and social problems confronting the EU – low productivity, the care deficit, demographic changes and continuing gender inequality in paid and unpaid work.

Successive European Commission communications have repeated the need for skills and employment programmes to improve flexibility, in order to enable women and men to combine work and care commitments ⁽⁷⁵⁾. These concern enhancing in particular the contribution of women to the formal economy and to growth, through paid work outside the home. The 2012 communication 'Towards a job-rich recovery' ⁽⁷⁶⁾ particularly emphasises the need to improve employment security in job transitions, such as the transition from maternity leave to employment. It emphasises that:

the integration of women in the labour market [deserves particular attention], by providing equal pay, adequate childcare, eliminating all discrimination and tax-benefit disincentives that discourage female participation, and optimising the duration of maternity and parental leave.

These communications set out clear directions for policy, alongside desirable actions, to address the care gap and the gender gap in employment.

⁽⁷²⁾ EIGE (2016b), 'What does infrastructure have to do with gender equality?'. Available at: <https://eige.europa.eu/news-and-events/news/what-does-infrastructure-have-do-gender-equality>

⁽⁷³⁾ De Henau, J., Himmelweit, S. and Perrons, D. (2017), 'Investing in the care economy – simulating employment effects by gender in countries in emerging economies', report by the Women's Budget Group for the International Trade Union Confederation and UN Women. Available at: https://www.ituc-csi.org/IMG/pdf/care_economy_2_en_web.pdf

⁽⁷⁴⁾ *Ibid.*

⁽⁷⁵⁾ See for example: European Commission (2010a), Commission communication – An agenda for new skills and jobs: a European contribution towards full employment, COM(2010) 682 final (available at: <https://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2010:0682:FIN:en:PDF>) and European Commission (2012), Commission communication – Towards a job-rich recovery, COM(2012) 173 final (available at: <https://ec.europa.eu/social/BlobServlet?docId=7619&langId=en>).

⁽⁷⁶⁾ European Commission (2012), COM(2012) 173 final.

Targeted EU Funds investment could significantly improve outcomes across these essential, and urgent, measures.

The case for investment in social infrastructure has become increasingly established, demonstrating significant opportunities for future programming within EU Funds to boost economic growth, employment and WLB.

The potential for integrating the ESF+ and ERDF to advance WLB by investing in both the care workforce and care facilities and services is clear.

There are extensive opportunities for combining training, skills and capacity development; improving employment practice; increasing self-employment; supporting migrant women's employment; and boosting investments in infrastructure for care, digital support, transport and other capital investment. This approach complements the dual approach of policy and legislation. It does so by taking a gender mainstreaming approach to financing to achieve the EU's twin objectives – gender equality and growth – and the objectives sought under the global 2030 Agenda.

Box 9. Why invest in a social care infrastructure?

- To promote gender equality and empowerment of all women and girls (sustainable development goal – SDG 5) by 'recognising and valuing unpaid care and domestic work through the provision of public services and infrastructure' (SDG 5.4).
- To reduce poverty (SDG 1) and 'ensure that all men and women, in particular the poor and the vulnerable, have equal rights to economic resources, as well as basic services' (SDG 1.4).
- To promote inclusive and sustainable economic growth (SDG 8) through the generation of 'full and productive employment and decent work for all women and men' (SDG 8.5).
- To reduce inequality within and among countries (SDG 10) by promoting 'income growth of the bottom 40 percent of the population at a rate higher than the national average' (SDG 10.1).
- To reduce 'inequalities of outcome, including by eliminating discriminatory laws, policies and practices' (SDG 10.3) through adoption of 'policies, especially fiscal, wage, and social protection policies and progressively achieve greater equality' (SDG 10.4).

Source: United Nations Development Programme, 2017.

4. ESF and ERDF financing for WLB in practice: examples of integrated measures

This section includes the following.

- An overview of current ESF and ERDF financing for WLB, highlighting specific examples from case studies on four EU Member States;
- The link of the key points to WLB in the draft regulations for relevant EU Funds under shared management programming post 2020.

Box 10. Facts on the ESF and ERDF

The ESF ⁽⁷⁷⁾ is the EU's main instrument for supporting job creation, helping people secure better jobs and ensuring fairer job opportunities for all EU citizens. As such, it invests in the EU's human capital – its workers, young people and all those seeking work.

The ERDF ⁽⁷⁸⁾ aims to strengthen economic and social cohesion in the EU by redressing imbalances between its regions. It focuses investments on key priority areas -known as 'thematic concentration'- such as:

- innovation and research;
- the digital agenda;
- support for SMEs;
- the low-carbon economy.

ESF and ERDF operational programming, as well as practical projects funded therein, present significant opportunities for effectively addressing and promoting WLB measures as a way of advancing gender equality.

However, evidence to date ⁽⁷⁹⁾ on the current operation of the funds reveals that neither of these key strategic investment levers (ESF and ERDF) is being used to its full potential to promote gender equality ⁽⁸⁰⁾. Although gender equality is included in the objectives of both funds, research shows

that the opportunities for relevant actions to promote WLB do not tend to feature prominently in national and sub-national programmes. This is despite clear policy measures to support Member States to make better use of European Funds to improve long-term and childcare services ⁽⁸¹⁾.

Generally, measures related to WLB focus on women's employment, and aim to improve women's labour market position by providing guidance and support for companies, workers and people on maternity, paternity or parental leave.

⁽⁷⁷⁾ European Commission, 'European Social Fund – What is the ESF?'. Available at: <http://ec.europa.eu/esf/main.jsp?catId=35&langId=en>

⁽⁷⁸⁾ European Commission, 'European Regional Development Fund'. Available at: https://ec.europa.eu/regional_policy/en/funding/erdf/

⁽⁷⁹⁾ EIGE conducted a gender assessment of ESIF Programmes in 11 Member States. In addition, to get a more in-depth understanding on the use of the ESF and the ERDF to promote work-life balance in the European Union, EIGE conducted four country case studies in Czechia, Germany, Estonia and Spain. The selection criteria for Member States took into account a range of elements – how long they have been part of the EU; the character of the welfare state – i.e. familial, dual or adult earner models; levels of ESIF investment; and the ESIF's contribution to interventions on 'infrastructure for early childhood education and care' (IC052) under social, health and education infrastructure and related investments. All four countries plan to dedicate a considerable share of their funds to this category of interventions – a category selected as a focus for this report because:

- access to affordable, quality childcare continues to constrain women's labour market participation and challenges efforts to redress gendered norms that relegate women to the position of second earners and principal carers;
- in budgetary terms, this is a main investment category for both the ESF and ERDF.

⁽⁸⁰⁾ EIGE, 2019;

European Parliament (2018), European Parliament resolution of 14 March 2017 on EU funds for gender equality (2016/2144(INI)), (2018/C 263/09). Available at: <https://eur-lex.europa.eu/legal-content/EN/ALL/?uri=CELEX:52017IP0075>

⁽⁸¹⁾ European Commission, 'Employment, Social Affairs & Inclusion – Work-life balance'. Available at: <https://ec.europa.eu/social/main.jsp?&catId=1311&langId=en>

Although some initiatives consider men's roles, the focus is squarely on women. Very few initiatives consider the transformation of stereotypes in the labour market, encouraging more men both in unpaid care work as well as paid care work and more women in better-paid 'traditionally' male-dominated sectors, as an aim.

4.1. Integrated initiatives between the ESF and ERDF in the field of WLB

The research shows very few examples of inter-connection between the ERDF and ESF in the field of WLB. The reviewed sub-national Operational Programmes (OPs) all contained measures on women's employment, but few countries included measures related to WLB.

To get a more in-depth understanding on the use of the ESF and ERDF to promote WLB in the European Union, EIGE conducted four country case studies in Czechia, Germany, Estonia and Spain ⁽⁸²⁾.

There are significant variations in the application of ESIF across the four country case studies. For example, while there is evidence of gendered labour market data informing the formulation of policy objectives and investment priorities, this is not consistent across all four countries.

The combined use of the ERDF and ESF to address infrastructure development, workforce expansion, employment access and sustainability is limited. However, there is some evidence that the analysis of infrastructure-related needs and use, including of transport, is a contributing factor in terms of supporting access to education. In Estonia, for instance, the provision of childcare services within the ESF is planned in conjunction with the ERDF intervention on 'sustainable urban development'.

The issue of Member States' changing demographic compositions – i.e. older populations and increasing care burdens for older people as they provide care for spouses, dependants and grandchildren – is not addressed as comprehensively as might

reasonably be expected given the significant pressures on individuals and public services.

The following key findings emerge from the country reports.

- Significant variations exist across Member States in terms of measures to advance WLB, including domestic legislative measures around leaves, permissions and support for care-related activity. Detailed research on gaps and challenges related to national policy frameworks on WLB from a gender perspective could dig deeper into these variations, while identifying how to best combine the ESIF with national funding to advance WLB.
- There is a lack of policy coherence and consistent action on high-level objectives at the OP level, with limited integration of high-level EU objectives in Member States' national action plans on gender equality. For example, the Barcelona targets on childcare are not prominent in documentation related to ESF and ERDF programme plans at the Member State level. Similarly, references are not made to fathers' and men's involvement in care, in accordance with the new directive on WLB for parents and carers.
- Positive examples exist of the multi-programme application of funds to address labour market disadvantages, the provision of childcare and social care, and improved institutional capacity in Czechia, Germany and Estonia. However, evidence from Spain is more limited.
- There has been limited application of the ESF and ERDF to boost national interventions and investment in essential childcare and social care provision. Among the four countries analysed, Estonia is the only apparent positive exception. The combined use of the ESF and ERDF remains rather unexplored in all four countries.
- Overall, there has been scarce articulation of WLB as a policy objective for both the ESF and ERDF, and limited articulation of OPs that integrate national and EU policy objectives on WLB.
- There has been limited use of both the ESF and ERDF to advance WLB measures, as well as legislative and non-legislative objectives presented in the new directive on WLB for

⁽⁸²⁾ Three of these four countries – Czechia, Germany and Spain – have selected equality between men and women in all areas as an investment priority, including in access to employment, career progression, reconciliation of work and private life and equal pay for equal work.

- parents and carers.
- Member States' formulation of OPs has made little use of sex-disaggregated data and gender analysis.
 - Inconsistencies exist in approaches to gender mainstreaming, with limited evidence of gender-budgeting tools used in the analysis of funds' allocations. Among the countries analysed, this was only carried out only in Germany's national ESF OP.
 - There is a dominant focus on childcare, to the exclusion of other forms of social care and measures to meet the needs of carers. This is particularly true for people who provide care for both children and older people, carers of persons living with disabilities and older carers.
 - There is scarce acknowledgement of the pressures upon older women and men as they provide care for a range of dependants, such as partners or spouses and grandchildren.
 - Within economic infrastructure, such as transportation systems (roads, cycleways, railways, etc.), water systems (clean water management etc.), energy (electric grids etc.), and health and education (hospitals, schools, etc.), investments in social care provision are minimal.

Overall conclusions from the country reports

Analysis of relevant documentation in the four Member States reveals a mixed picture of the extent to which programmes funded under the ESF and ERDF are being used effectively as mechanisms for improving WLB, with a view to advancing gender equality and specifically improving women's independent economic status.

Ahead of a new programming round and the implementation of the new directive on WLB, there is a clear need for action to improve gender analysis and gender impact assessment⁽⁸³⁾ in order to inform the use of EU Funds finances. This is vital to address barriers to women's labour market participation, both as a matter of gender equality and of economic growth.

Key actions required include the clearer articulation of policy objectives by the EU, and action to advance these objectives through the application

of EU Funds at the Member State level. Moreover, it will be essential to improve the collection and use of sex-disaggregated data, alongside gender analysis, to inform OPs and the actions that flow from them. The findings also highlight the need to improve monitoring and evaluation (M&E) at the programme level within Member States, as well as in the scope of the European Commission's programme approval and monitoring processes.

Examples from country reports

Several specific examples are worth highlighting. At the national level in Germany, an interesting pilot in 2007–2013 co-funded by the ESF was 'More men in kindergartens' (*MEHR Männer in Kitas*). The programme has supported and increased the engagement of men as part of the kindergarten workforce, based on the belief that the presence of men in such settings is highly beneficial for children, men and women alike. The initiative continues as part of the new project, 'Cross-entry – men and women in kindergartens' (*Quereneinstieg – Männer und Frauen in Kitas*) during the current implementation period.

Compared to childcare considerations, long-term care services are under-represented in the OPs. In Lower Saxony's multi-fund ESF/ERDF programme, long-term care provision is flagged as a concern for the future, indicating the need for employers to become more flexible in terms of harmonising care and work, since the number of people in need of care is increasing. No information on long-term care services was found in the ERDF programme for Mecklenburg-West Pomerania.

Economic disincentives for second earners are mentioned as a challenge in Lower Saxony's ESF/ERDF OP strategy and in Mecklenburg-West Pomerania's ESF OP as a recommendation of the European Council. No further details are provided and the issue is not mentioned at all in other programmes.

In Germany's OPs at the national and state levels, long-term care and childcare are often mentioned in a single sentence, without clear differentiation. Insufficient attention is paid to long-term care,

⁽⁸³⁾ These gender analyses need to take place at the national, regional and local levels in order to address the socioeconomic situations of women and men at each of these levels.

despite significant demographic pressures.

Germany's ESIF OPs contain various statements on the topic of WLB. Childcare infrastructure has been strengthened through the use of funds provided by the Federal Government, while other measures have sought to improve the situation of parents who, in addition to their paid work, must perform care work at home.

The national ESF OP describes initiatives to support men in particular to become workers and teachers in early childcare education, in order to tap unused expert potential. This action has two key advantages. First, it contributes to better childcare services and, second, it eliminates stereotypes in career choices. This can be seen as a good practice.

As ERDF programmes are less oriented towards social issues, they may be expected to contribute less to WLB. However, the review of some OPs reveals direct references to support for WLB-related issues within their measures. For example, it is worth noting measures in Mecklenburg-West Pomerania's OP and its specific objective on improving city infrastructure within the spheres of education, work and society as an element of integrated sustainable development. Among these measures' aims is support for investments in childcare infrastructure as a means of facilitating women's employment.

Another example comes from Estonia, where the ESF budget allocation totals EUR 38.7 million for two open rounds of applications on 'creating childcare services and support services for children with disabilities aged 0–7' and 'creating childcare services for children aged 0–7'. This increase in service provision is funded through the ESF, but not the ERDF. However, the provision of childcare services is planned in conjunction with the ERDF intervention under 'sustainable urban development'. This supports the development of childcare and preschool education infrastructure in larger urban areas to reduce the need for transport, while supporting employment. The respective ERDF allocation is EUR 34 million. According to Estonia's *Annual Implementation Report 2017*, the 708 childcare places created as a result of these efforts have shortened childcare waiting lists, facilitated carers' and guardians' reintegration in the labour market, and improved parents' WLB.

In Estonia there has also been attempt to reduce long-term carers' care burden with ESF support. This is conceived as a means of enabling their opportunities for other work, while supporting households in which a member requires long-term care. The ESF allocation of just under EUR 37 million is budgeted for the activity, 'welfare services for elderly, people with special needs or coping difficulties and their family members with care burden to increase participation in labour market.' This falls under the broader measure of 'welfare services to increase participation in the labour market.' According to the country's *Annual Implementation Report 2017*, 24 % of the mid-term target for special care places and 6 % of the target for improving living conditions for persons with disabilities have been reached. The narrative content of ESF and ERDF documentation contains evidence of gendered analysis and the orientation of the funds towards the structural dimensions of WLB. To reduce the care burden among women of working age, services will be developed to assist people to care for children, family members with special needs and older family members.

In Czechia, the OP on employment 2014–2020 is the principle programme which seeks to address equal opportunities and WLB. The need to improve women's positions in the labour market in light of the multiple disadvantages they experience is specifically emphasised by investment priority 1.2, 'equality between men and women in all areas, including in access to employment, career progression, reconciliation of work and private life and promotion of equal pay for equal work.' The current allocation for this investment priority is CZK 8.5 million (approximately EUR 330 550). In order to achieve its objectives and tackle substantial differences in women's and men's positions in the labour market, support concentrates on the following multiple areas.

Support is provided for the construction, operation, quality setting and development of a network of affordable, locally available childcare services. These include children's groups and children's clubs, among others. The emphasis is on overcoming the current absence of services for children up to the age of three, as well as for older children, depending on the demographic circumstances. Measures also include education for people working in childcare facilities and people who provide,

or are preparing to provide, childcare services.

Further vocational education and training are delivered for women and other carers. This capacity building aims to improve access to the labour market, self-employment and the creation of small businesses and start-ups.

Education and consulting activities are offered for people on maternity or parental leave, as well as for carers – many of whom are elderly women.

Education, training, awareness raising and consultancy services are provided to promote women's and men's equal opportunities in the labour market, with a view to combat gender stereotypes and gender discrimination.

Efforts are made to encourage the implementation and uptake of flexible forms of labour in order to support the reconciliation of work and private life. Education, awareness raising and consultations are offered for employers. In tandem, direct financial support for flexible forms of work is provided through wage contributions.

Several activities aim to involve men to a greater extent in childcare and caring for other dependants. These include sociological surveys, awareness raising, topic promotion, education on parental competences, the reconciliation of work and private life for male employees and counselling for men who are on parental leave.

Associated actions to support equal opportunities for women and men in the labour market are a key form of support under this investment priority, including promoting transportation, catering, accommodation and care for dependants.

In addition to the activities implemented under the employment OP, there are other OPs indirectly supporting the common aim of a better reconciliation of work and private life. For example, priority 4 of Czechia's [Prague – Growth Pole OP](#), with actions funded through a combination of ESF and ERDF

funds, aims at creating new educational capacities to support the establishment of new, alternative forms of non-parental preschool care (including for children younger than 3 years).

In Spain, both ESF and ERDF investments include WLB measures. However, the two funds are not combined. ESF-financed activities focus on improving coordination between existing employment and social services. In Andalusia, WLB measures include an attempt to extend care services, alongside support for transport services to facilitate non-compulsory education for students living in rural areas, dispersed urban zones or isolated areas which lack high schools or education and professional training centres. ERDF investments related to WLB aim to improve the accessibility and conditions of health and social services, so as to 'personalise itineraries' for groups living in vulnerable conditions. ERDF investments for improving compulsory education services are mentioned in Andalusia's OP. However, childcare services for children under the age of three are not mentioned. Similarly, long-term care is not an investment priority for the ERDF. The principle focus of investments is on improving access to existing public social services for people at risk of social exclusion. They include women who are part of vulnerable groups. There is also a more explicit mention of persons with disabilities and the need to ensure that they can retain employment.

The lack of consideration for care facilities for older people as a priority for ERDF funding, and the absence of childcare provision within support for education services under the ESF, appear to overlook the need for a dual approach between the ESF and ERDF. This dual approach is needed to consider the social and economic benefits of investment in care services, and to address structural barriers to gender equality – including the imbalance in care provision – by improving publicly available, accessible services. The imbalance in care provision results in a 'care gap' in Spain, obliging women to assume increasing formal and informal care responsibilities.

Box 11. Have ESIF interventions on WLB changed gender relations, roles and responsibilities for women and men in the EU?

So far, this question remains unanswered, mainly due to a lack of dedicated evaluations looking at these specific topics, as well as a general trend of not analysing the implications of gender stereotypes for women and men's social and economic well-being.

A shift is needed 'to empower women at work and involve men at home.' The EU's new directive on WLB may present a solution to the 'care gap' by promoting gender equality in both spheres ⁽⁸⁴⁾.

its proposals for the next funding framework for 2021–2027, which define the scope of the EU's various funding programmes.

It is expected that the EU Funds will continue to drive social and economic investment through the same funds, although a specific fund for migration may be added. This is in line with the post-2020 programming of the EU Funds, structured around five policy objectives laid down in the proposal for a CPR and the specific objectives set out in proposals for a regulation on the ERDF, the CF and the ESF+.

To achieve gender equality across Member States, there is a need to reshape investments. It is imperative that alternative definitions and conceptual understandings of investment, which would consider the links between social and physical infrastructure and WLB presented in Section 3.1, are operationalised in the EU Funds. For future generations, and the sustainability of human lives and our ecosystem, a focus on 'investments for well-being' is essential. A shift from the reproduction of market capital to the reproduction and sustainability of life is required ⁽⁸⁵⁾.

4.2. Next funding period 2021–2027: how to advance WLB with the EU Funds?

In 2018, the European Commission presented

Box 12. The economy of well-being

The 'economy of well-being' can be defined as an economy that does the following.

- Expands the opportunities available to people for upward social mobility and for improving their lives along the dimensions that matter most to them. This includes expanding opportunities for access to high-quality education and healthcare, and promoting inclusive social protection systems.
- Ensures that these opportunities translate into well-being outcomes for all segments of the population, including those at the bottom of the distribution.
- Reduces inequalities.
- Ensures environmental and social sustainability ⁽⁸⁶⁾.

This means recognising the various dimensions of inequalities that exist (and how they intersect with gender) and everyone's right to care in its broadest sense as described in Sections 2.1 and 2.2. For example, intergenerational housing might be needed to improve social inclusion, community

cohesion and sustainability. These include low carbon amenities, which could be proposed under policy objective 4: A more social Europe, by implementing the European Pillar of Social Rights.

We will focus first on the ERDF, as this fund has

⁽⁸⁴⁾ Wutz, I. (2018), 'The new EU work life balance directive presents solutions to empower women and contribute to gender equality', COFACE Families Europe. Available at: <http://www.coface-eu.org/europe/iwd2018/>

⁽⁸⁵⁾ Rodríguez Enríquez, C. (2015), 'Economía feminista y economía del cuidado – aportes conceptuales para el estudio de la desigualdad', *Nueva Sociedad*, Vol. 256, pp. 30–44. Available at: http://nuso.org/media/articles/downloads/4102_1.pdf

⁽⁸⁶⁾ OECD (2019), 'The economy of well-being – creating opportunities for people's well-being and economic growth', SDD Working Paper No 102. Available at: [www.oecd.org/officialdocuments/publicdisplaydocumentpdf/?cote=SDD/DOC\(2019\)2&docLanguage=En](http://www.oecd.org/officialdocuments/publicdisplaydocumentpdf/?cote=SDD/DOC(2019)2&docLanguage=En)

shown deficiencies in terms of interventions to advance WLB. As noted in the introduction, only 0.6 % of total ERDF funding is allocated to gender equality⁽⁸⁷⁾. EIGE's own calculation⁽⁸⁸⁾ of the ESIF potential contribution to gender equality objectives, which takes into account that the current ERDF share of the total ESIF budget is about 43 %, shows that a greater emphasis on gender equality in ERDF interventions would increase the ESIF budget supporting gender equality projects more than twofold. This equals 53 % of the EU contribution through the ESIF, and represents between 25 % and 50 % of the total budget of the structural funds budget (together).

The proposed regulation, COM(2018) 375 final, commits Member States and/or managing authorities to the following measures, according to Article 20 for each programme⁽⁸⁹⁾:

1. *Set out a strategy for the programme's contribution to the policy objectives and the communication of its results.*
2. *A programme shall consist of priorities. Each priority shall correspond to a single policy objective or to technical assistance. A priority corresponding to a policy objective shall consist of one or more specific objectives. More than one priority may correspond to the same policy objective.*
3. *Each programme shall set out:*
 - (a) *a summary of the main challenges, taking into account:*
 - (i) *economic, social and territorial disparities, except for programmes supported by the [European Maritime and Fisheries Fund] EMFF;*
 - (ii) *market failures, investment needs and complementarity with other forms of support;*
 - (iii) *challenges identified in relevant country-specific recommendations and other relevant Union recommendations addressed to the Member State;*
 - (iv) *challenges in administrative capacity and governance;*
 - (v) *lessons learnt from past experience;*
 - (vi) *macro-regional strategies and sea-basin strategies where Member States and regions*

participate in such strategies;
 (vii) *for programmes supported by the [Asylum, Migration and Integration Fund] AMIF, the [Internal Security Fund] ISF and the [Federal Ministry of Transport and Digital Infrastructure of Germany] BMVI, progress in implementing the relevant Union acquis and action plans;*

- (b) *a justification for the selected policy objectives, corresponding priorities, specific objectives and the forms of support;*
- (c) *for each priority, except for technical assistance, specific objectives;*
- (d) *for each specific objective:*
 - (i) *the related types of actions, including a list of planned operations of strategic importance, and their expected contribution to those specific objectives and to macro-regional strategies and sea-basin strategies, where appropriate;*
 - (ii) *output indicators and result indicators with the corresponding milestones and targets;*
 - (iii) *the main target groups;*
 - (iv) *specific territories targeted, including the planned use of integrated territorial investment, community-led local development or other territorial tools;*
 - (v) *the interregional and transnational actions with beneficiaries located in at least one other Member State;*
 - (vi) *the planned use of financial instruments;*
 - (vii) *the types of intervention and an indicative breakdown of the programmed resources by type of intervention or area of support.*

Furthermore, Article 20 outlines joint support by the ERDF, ESF+ and CF (common provisions) by stating:

1. *The ERDF, the ESF+ and the Cohesion Fund may jointly provide support for programmes under the Investment for jobs and growth goal.*
2. *The ERDF and the ESF+ may finance, in a complementary manner and subject to a limit of 10 % of support from those Funds for each priority of a programme, all or part of an operation for which the costs are eligible for support from*

⁽⁸⁷⁾ European Parliament, 2016b.

⁽⁸⁸⁾ EIGE (2019), p. 35.

⁽⁸⁹⁾ European Commission (2018c), COM(2018) 375 final.

the other Fund on the basis of eligibility rules applied to that Fund, provided that such costs are necessary for the implementation.

These extracts from the draft regulations for relevant EU Funds programming post 2020 reveal crucial points for advancing WLB. They enable Member States and/or managing authorities to link to WLB when providing information on why chosen priorities are important – based on analysis of market failures, challenges and lessons learned – or when justifying the choice of policy objectives, priorities and specific objectives. They will be able to do so in each of the steps related to their programmes, by referring to the dimensions highlighted in Section 2.4 – i.e. women’s and men’s time use; their access to skills, training, flexible employment and parental or carers’ leave; and access to flexible, quality care for children, older

people and persons living with disabilities.

To enhance effective coordination, while promoting synergies and consistency between the ESF+ and ERDF in the sphere of WLB, the regulation has set important guidelines for consideration:

- the focus on investments for jobs and growth goals when combining the funds;
- a 10 % limit on contributions to the ‘other’ fund to support each programme priority.

As seen above, the guidelines set out by Article 20⁽⁹⁰⁾ limit the combined use of the two funds. Thematic concentration further limits the space for action available to ERDF programmes to fund priority objectives other than policy objectives 1 and 2, as evidenced within the ERDF regulation described in Box 13.

Box 13. Thematic concentration in the ERDF regulation

For ERDF programming, the ERDF regulation⁽⁹¹⁾ states the following.

In order to ensure that, in a context of budget reduction, there is still a critical mass of investment, the ERDF and the Cohesion Fund Regulation maintains requirements for thematic concentration. The majority (65 % to 85 %) of resources will be concentrated on contributing to the policy objectives which evaluation evidence and the impact assessment suggest have the highest added value, as well as the greatest contribution to EU priorities:

- PO1: ‘A smarter Europe by promoting innovative and smart economic transformation’;
- PO2: ‘A greener, low-carbon Europe by promoting clean and fair energy transition, green and blue investment, the circular economy, climate adaptation and risk prevention and management’.

In order to enable flexibility, thematic concentration criteria will apply at national level.

Table 4 shows that ERDF budgets tend to focus on policy objectives 1 and 2. This implies that most of the ERDF budget is allocated to these two policy

objectives. However, as the table indicates, this also depends on each Member States’ economic performance in terms of their gross national income (GNI).

⁽⁹⁰⁾ European Parliament and Council (2013a), Regulation (EU) No 1299/2013 of the European Parliament and of the Council of 17 December 2013 on specific provisions for the support from the European Regional Development Fund to the European territorial cooperation goal. Available at: <https://eur-lex.europa.eu/legal-content/EN/ALL/?uri=CELEX:32013R1299>

⁽⁹¹⁾ European Commission (2018d), COM(2018) 372 final.

Table 4. ERDF budgets focus on policy objectives 1 and 2

For countries with	Minimum % PO1	Minimum % PO2
GNI below 75 %	35 %	30 %
GNI 75–100 %	45 %	30 %
GNI above 100 %	60 %	Not applicable PO1 and PO2 minimum 85 %

The ESF+ is regarded as the main instrument for supporting WLB within the EU Funds. Most importantly, it does so by directly addressing the specific objective of ‘a better work/life balance’ laid out in Article 4 (iii) of the draft regulations for ESF+:

promoting women’s labour market participation, a better work/life balance including access to childcare, a healthy and well-adapted working environment addressing health risks, adaptation

of workers, enterprises and entrepreneurs to change, and active and healthy ageing (p. 27)

Demand for innovative actions may also be considered a potential entry point for enhancing support for WLB, and finding new ways of providing such support. Article 13 calls for the implementation of new approaches within the ESF+. It allows for higher co-financing rates in these cases, as reflected in Box 14.

Box 14. Innovative actions in the ESF+ regulation

Article 13 of the ESF+ regulation ⁽⁹²⁾ places innovative demands on ESF+ programming by:

- demanding that at least one ESF+ priority axis implements innovative actions to address any specific objective defined for the ESF+;
- confirming that these actions may be supported by higher co-finance rates of up to 95 % for the allocation of a maximum of 5 % of the national ESF+ budget.

Article 13 of the draft ESF+ regulation states ⁽⁹³⁾:

Innovative actions

1. Member States shall support actions of social innovation and social experimentations, or strengthen bottom-up approaches based on partnerships involving public authorities, the private sector, and civil society such as the Local Action Groups designing and implementing community-led local development strategies.

2. Member States may support the up-scaling of innovative approaches tested on a small-scale (social experimentations) developed under the Employment and Social Innovation strand and other Union programmes.

3. Innovative actions and approaches may be programmed under any of the specific objectives set out in points (i) to (x) of Article 4(1).

4. Each Member State shall dedicate at least one priority to the implementation of paragraphs 1 or 2 or to both. The maximum co-financing rate for these priorities may be increased to 95 % for the allocation of maximum 5 % of the national ESF+ allocation under shared management to such priorities.

⁽⁹²⁾ European Commission (2018g), COM(2018) 382 final.

⁽⁹³⁾ ESF+ regulation (European Commission (2018g), COM(2018) 382 final).

To combine the ESF+ and ERDF, it is vital to bear their overarching regulations in mind. It is equally essential to consider the linkages between the EU

Funds and the policy objectives. This is because synergies and combinations will be easier within certain policy objectives than within others:

Table 5. Synergies and combinations with policy objectives

Policy objective	ERDF	ESF+
Policy objective 1: A smarter Europe – innovative and smart industrial transformation	X (main)	X (addition)
Policy objective 2: A greener, low-carbon Europe	X (main)	X (addition)
Policy objective 3: A more connected Europe – mobility and regional ICT connectivity	X	
Policy objective 4: A more social Europe – implementing the European Pillar of Social Rights	X	X (main)
Policy objective 5: Europe closer to citizens – sustainable and integrated development of urban, rural and coastal areas through local initiatives	X	X
Technical assistance	X	X

It will also be crucial to develop programmes for the ERDF and ESF+ in an integrated manner, searching for interlinkages and synergies when deciding on the content of programmes. An integrated

approach could also become a specific focus of shared management within the partnership process, enabling the definition of national activities in the Partnership Agreement (PA).

5. Practical model for promoting WLB through the ESF+ and ERDF: interventions and examples

This section presents the following.

- A practical model that aims to support WLB measures within the ESF+ and ERDF, both separately and jointly (multi-funded programmes), which includes the following four main steps and fictional examples of how to apply the steps.
 - Step 1: Alignment with strategic goals for gender equality.
 - Step 2: Identifying possible interventions in the ESF+ and/or ERDF for WLB.
 - Step 3: Developing gender-sensitive projects and interventions to advance WLB.
 - Step 4: Follow-up through the use of indicators within M&E systems.
 - Fictional case studies on applying the model's steps.

5.1. Overview of the model

The promotion of WLB measures within the ESF+ and ERDF goes hand in hand with the Commission's initiative on the subject. Therein, the European Commission explicitly encourages funding from the EU Funds, including the European Fund for Strategic Investments, to advance WLB⁽⁹⁴⁾.

The model, and this section in particular, is intended to be used at the Member State level, and by managing authorities involved in EU Funds programming and investments. It can also be used as a form of guidance at the overall EU level, as a means of following up on progress made, as well as following up on women's and men's equal rights and opportunities for employment in the labour market.

The model's four proposed steps offer a starting point for Member State governments and managing authorities to formulate clear calls for projects that reflect the overarching policy objectives, that tie-in with cross-fund activity, and are underpinned by robust M&E frameworks. These frameworks would explicitly aim at articulating the need to deliver gender equality outcomes through the EU Funds.

In the next programming funding period (2021–2027), 143 measures are presented within the ESF+ and ERDF as possible interventions. Of these, only one intervention focuses specifically on WLB. Nevertheless, many measures overlap and may contribute to improving WLB if gender equality is properly mainstreamed within the funds. As such, gender equality needs to be considered in all steps of the funds' programming cycle. However, gender mainstreaming is often not well-understood or effectively implemented, especially in the sphere of budgeting and investments.

When the gender dimensions are not properly analysed, explicitly included and mainstreamed in programmes, gender-related inequalities and concerns can be overlooked in practice. For example, the use of gender mainstreaming methods and tools such as gender analysis may be (mistakenly) considered unnecessary for EU Funds measures on recycling, railway construction and ecotourism – so-called 'hard issues'. Unless the connections between time use, multiple care roles and all EU Funds measures are made explicit, entry points for promoting WLB will not be identified, and investment opportunities risk being lost.

⁽⁹⁴⁾ Milotay, 2019.

Figure 1: Steps of this model



5.2. Steps 1, 2 and 3

Table 6 categorises the proposed interventions according to the objectives in the draft programme regulations. The table adds a set of proposed non-legislative actions that would support improved WLB by:

- enhancing the quality and accessibility of care provision;
- supporting active ageing;

- improving integrated healthcare communication;
- ensuring greater integration of shared services;
- improving the integration of employability, migrant support and care workforce expansion by strengthening the quality of care-related employment.

In this context, it is also important to recall the policy objectives related to each fund, as presented in Section 4.2 on the next funding period 2021–2027.

Table 6. Non-legislative actions that would support WLB

Step 2: Consider possible interventions from the regulation on the period 2021–2027	Step 3: Possible gender-aware actions to promote WLB in the ERDF	Step 3: Possible gender-aware actions to promote WLB in the ESF+
<p>Policy objective 1: A smarter Europe by promoting innovative and smart economic transformation (main policy objective for the ERDF; additional policy objective for the ESF+)</p> <ul style="list-style-type: none"> • Business infrastructure for SMEs (including industrial parks and sites) • SME business development and internationalisation • Skills development for smart specialisation, industrial transition and entrepreneurship • Advanced support services for SMEs and groups of SMEs (including management, marketing and design services) • Incubation, support to spin-offs, spin-outs and start-ups • Innovation cluster support and business networks primarily benefitting SMEs • Innovation processes in SMEs (processes, organisation, marketing, co-creation, user- and demand-driven innovation) • Research and innovation processes, technology transfer and cooperation between enterprises focusing on the circular economy 	<p><i>Build childcare and intergenerational care facilities as part of businesses, industrial parks and incubation centres</i></p> <p><i>Develop childcare and social care service SMEs</i></p> <p><i>Facilitate innovation between SME clusters on shared care services and facilities</i></p> <p><i>Support innovation clusters and business networks that primarily benefit SMEs based on specific assessments of the needs of female- and male-owned SMEs, and the needs of women and men employees</i></p>	<p><i>Develop training initiatives in SMEs to promote changes in the traditional gender roles of women (as care-givers) and men (as breadwinners)</i></p> <p><i>Promote organisation and personnel development in companies, focused on changing the mind-set of people in leadership positions</i></p>
<p>Policy objective 2: A greener, low carbon Europe by promoting clean and fair energy transition, green and blue investment, the circular economy, climate adaptation and risk prevention and management (main policy objective for the ERDF; additional policy objective for the ESF+)</p> <ul style="list-style-type: none"> • Household waste management, including prevention, minimisation, sorting and recycling measures • Clean urban transport infrastructure 	<p><i>Revise the locations of recycling centres in relation to women’s and men’s needs (as women, on average, spend more time on household waste management, the provision of waste management facilities influences women’s time-use). Considering this when developing waste management initiatives can free up women’s time, enable them to engage in other activities and improve their work-life balance)</i></p> <p><i>Plan clean urban transport infrastructure based on an assessment of women’s and men’s mobility needs</i></p>	
<p>Policy objective 3: A more connected Europe by enhancing mobility and regional ICT connectivity (policy objective applicable to the ERDF)</p> <ul style="list-style-type: none"> • Cycling infrastructure • Digitalisation of urban transport • Multimodal transport (TEN-T) • Multimodal transport (i.e. rural/non-urban) • Digitising transport via other modes of transport 	<p><i>Ensure that transport planning and provision demonstrates the application of gendered time use analysis and responsiveness to multiple care-related travel and transport activities</i></p>	

Step 2: Consider possible interventions from the regulation on the period 2021–2027	Step 3: Possible gender-aware actions to promote WLB in the ERDF	Step 3: Possible gender-aware actions to promote WLB in the ESF+
<p>Policy objective 4: A more social Europe by implementing the European Pillar of Social Rights (main policy objective for the ESF+; additional policy objective for the ERDF)</p> <ul style="list-style-type: none"> • Infrastructure for early childhood education and care • Infrastructure for primary and secondary education • Infrastructure for tertiary education • Infrastructure for vocational education, training and adult learning • Housing infrastructure for migrants, refugees and persons under, or applying for, international protection • Housing infrastructure (other than infrastructure for migrants, refugees and persons under or applying for international protection) • Other social infrastructure that contributes to social inclusion in the community • Health infrastructure • Health equipment • Health mobile assets • Digitalisation in healthcare • Temporary reception infrastructure for migrants, refugees and persons under, or applying for, international protection • Measures to improve access to employment • Measures to promote access to employment among the long-term unemployed • Specific support for youth employment and the socioeconomic integration of young people • Support for self-employment and business start-ups • Support for the social economy and social enterprises • Measures to modernise and strengthen labour market institutions and services, in order to assess and anticipate skills needs, while ensuring timely, tailor-made assistance • Support for labour market matching and transitions • Support for labour mobility • Measures to promote women's labour market participation and reduce gender-based segregation in the labour market 	<p><i>Invest in the construction of childcare and social care facilities, alongside the expansion of the care workforce</i></p> <p><i>Ensure inter-generational housing, social care and social service provision – including low-carbon amenities – to improve social inclusion, community cohesion and sustainability</i></p> <p><i>Link innovations in healthcare technology with the expansion of SMEs, time-use analysis, expanded care facilities, and digital inclusion actions (combined ERDF and ESF+)</i></p> <p><i>Support the expansion of care infrastructure and the care workforce through youth employment and employability programmes for older workers, alongside a focus on labour mobility (combined ERDF and ESF+)</i></p> <p><i>Expand the eligibility of education and care support to include infrastructure for care facilities (combined ERDF and ESF+)</i></p> <p><i>Integrate the expansion of care facilities and infrastructure with actions to support labour market access and active and healthy lives, and address social and economic exclusion (combined ERDF and ESF+)</i></p> <p><i>Innovate to improve the integration of Roma communities and their access to care and education services (combined ERDF and ESF+)</i></p> <p><i>Build expertise in gender and housing, and in gender and infrastructure planning, and apply this to projects</i></p> <p><i>Support innovative community-based forms of cooperative housing projects that integrate intergenerational forms of housing and community-based forms of care provision</i></p>	<p><i>Include childcare provision in eligible infrastructure expansion at all levels of mandatory public education to increase the availability of good-quality, affordable and accessible childcare (childcare expansion integrated with education facilities maximises infrastructure investments, while reducing travel-related emissions and time pressures)</i></p> <p><i>Innovate in housing provision for different family sizes and household compositions, including improved provisions for older people and persons living with disabilities</i></p> <p><i>Include the provision of care services within support for social enterprises</i></p> <p><i>Support the development of work-life balance practices among employers of all sizes, in line with ‘a healthy, well-adapted working environment’, including innovative flexible working practices and stress-reducing time-use initiatives</i></p> <p><i>Demonstrate links across the ‘Agenda for new skills and jobs’, with a focus on ‘modernising the labour market and promoting work through new forms of flexibility and security’⁽⁹⁵⁾</i></p> <p><i>Advance innovations in employment and skills activities related to the expansion of the care workforce, so as to increase the domestic labour force and the labour market participation of nationals of countries outside the EU</i></p> <p><i>Support innovation in the design, construction and delivery of good-quality care services, including inter-generational care, digital healthcare, the expansion of the care workforce, and urban and transport infrastructure</i></p> <p><i>Support innovation and the integration of improved childcare and care services within measures to address poverty and social exclusion</i></p>

(95) Eurostat, 2018a.

Step 2: Consider possible interventions from the regulation on the period 2021–2027	Step 3: Possible gender-aware actions to promote WLB in the ERDF	Step 3: Possible gender-aware actions to promote WLB in the ESF+
<ul style="list-style-type: none"> • Measures to promote work-life balance, including access to childcare and care for dependent persons • Measures for a healthy and well-adapted working environment to address health risks, including the promotion of physical activity • Support for the development of digital skills • Support for the adaptation of workers, enterprises and entrepreneurs to change • Measures that encourage active and healthy ageing • Support for early childhood education and care (excluding infrastructure) • Support for primary to secondary education (excluding infrastructure) • Support for tertiary education (excluding infrastructure) • Support for adult education (excluding infrastructure) • Measures to promote equal opportunities and active participation in society • Pathways to integration and re-entry into employment for disadvantaged people • Measures to improve the access of marginalised groups, such as the Roma community, to education and employment and to promote their social inclusion • Support for civil society working with marginalised communities, such as the Roma • Specific actions to increase the participation of third-country nationals in employment • Measures for the social integration of third country nationals • Measures to enhance equal, timely access to quality, sustainable and affordable services • Measures to enhance the delivery of family and community-based care services • Measures to improve the accessibility, effectiveness and resilience of healthcare systems (excluding infrastructure) • Measures to improve access to long-term care (excluding infrastructure) • Measures to modernise social protection systems, including promoting access to social protection • Promoting social integration of people at risk of poverty or social exclusion, including the most deprived and children • Addressing material deprivation through food and/or material assistance for the most deprived, including accompanying measures 	<p><i>Innovate to improve the integration of Roma communities and their access to care and education services (combined ERDF and ESF+)</i></p> <p><i>Build expertise in gender and housing, and in gender and infrastructure planning, and apply this to projects</i></p> <p><i>Support innovative community-based forms of cooperative housing projects that integrate intergenerational forms of housing and community-based forms of care provision</i></p>	<p><i>Include childcare provision in eligible infrastructure expansion at all levels of mandatory public education to increase the availability of good-quality, affordable and accessible childcare (childcare expansion integrated with education facilities maximises infrastructure investments, while reducing travel-related emissions and time pressures)</i></p> <p><i>Innovate in housing provision for different family sizes and household compositions, including improved provisions for older people and persons living with disabilities</i></p> <p><i>Include the provision of care services within support for social enterprises</i></p> <p><i>Support the development of work-life balance practices among employers of all sizes, in line with ‘a healthy, well-adapted working environment’, including innovative flexible working practices and stress-reducing time-use initiatives</i></p> <p><i>Demonstrate links across the ‘Agenda for new skills and jobs’, with a focus on ‘modernising the labour market and promoting work through new forms of flexibility and security’⁽⁹⁶⁾</i></p> <p><i>Advance innovations in employment and skills activities related to the expansion of the care workforce, so as to increase the domestic labour force and the labour market participation of nationals of countries outside the EU</i></p> <p><i>Support innovation in the design, construction and delivery of good-quality care services, including inter-generational care, digital healthcare, the expansion of the care workforce, and urban and transport infrastructure</i></p> <p><i>Support innovation and the integration of improved childcare and care services within measures to address poverty and social exclusion</i></p>

⁽⁹⁶⁾ Eurostat, 2018a.

Step 2: Consider possible interventions from the regulation on the period 2021–2027	Step 3: Possible gender-aware actions to promote WLB in the ERDF	Step 3: Possible gender-aware actions to promote WLB in the ESF+
<p>Policy objective 5: A Europe closer to citizens by fostering the sustainable and integrated development of urban, rural and coastal areas and local initiatives</p> <ul style="list-style-type: none"> • Protection, development and promotion of public tourism assets and related tourism services • Protection, development and promotion of cultural heritage and cultural services • Protection, development and promotion of natural heritage and ecotourism • Physical regeneration and the security of public spaces 	<p><i>Advance innovations in care facilities in indigenous communities, and ensure access to care and education services in their languages with due consideration for their cultural heritage and living areas (combined ERDF and ESF+) ⁽⁹⁷⁾</i></p> <p><i>Advance innovations in the regeneration and security of public spaces and buildings, while taking into account gender planning knowledge</i></p>	<p><i>Support innovations in the provision of care for workers engaged in public tourism services</i></p>
<p>Other codes related to policy objectives 1-5 (combined ERDF and ESF+)</p> <ul style="list-style-type: none"> • Improve the capacity of programme authorities and bodies linked to the implementation of the funds • Enhanced cooperation with partners both within and outside EU Member States • Cross-financing under the ERDF, including support for actions similar to those financed by the ESF which are necessary for the implementation of operations directly linked to the ERDF 	<p><i>Improve cross-programme actions on expanding child-care and social care infrastructure and the related care workforce</i></p> <p><i>Improve the quality, availability and application of relevant data for effective gender analysis to inform programme priorities and funded actions to advance work-life balance</i></p> <p><i>Improve the awareness and understanding of programme authorities and others involved in programme implementation regarding the inter-related gendered dimensions of time-use, care facilities, transport, and infrastructure use</i></p>	<p><i>Improve cross-programme actions on expanding child-care and social care infrastructure and the related care workforce</i></p> <p><i>Improve the quality, availability and application of relevant data for effective gender analysis to inform programme priorities and funded actions to advance work-life balance</i></p> <p><i>Improve the awareness and understanding of programme authorities and others involved in programme implementation regarding the inter-related gendered dimensions of time-use, care facilities, transport, and infrastructure use</i></p>
<p>Technical assistance (combined ERDF and ESF+)</p> <ul style="list-style-type: none"> • Information and communication • Preparation, implementation, monitoring and control • Evaluation, studies and data collection • Reinforcement of the capacity of Member State authorities, beneficiaries and relevant partners 	<p><i>Increase monitoring and evaluation-related reporting to include specific actions on promoting work-life balance and actions to advance gender equality</i></p> <p><i>Improve ex-ante analysis, programme and project content, and monitoring and evaluation</i></p>	<p><i>Increase monitoring and evaluation-related reporting to include specific actions on promoting work-life balance and actions to advance gender equality</i></p> <p><i>Improve ex-ante analysis, programme and project content, and monitoring and evaluation</i></p>

⁽⁹⁷⁾ For example, the Sami people of northern Scandinavia who live in natural heritage areas.

5.3. Step 4: Follow-up through the use of indicators within M&E systems

In selecting and formulating proposed activities to promote WLB through the use of the ESF+ and ERDF, representatives of managing authorities in

Member States can work through Step 3. In this regard, they would consider the desired outcomes, alongside indicators of progress and change in relation to these outcomes, in order to follow-up on the achievement of the outcomes. The example below illustrates how using a process of stages or steps, stakeholders can consider the core objective, actions to progress towards the objective and indicators ⁽⁹⁸⁾ to inform actions and M&E.

Box 15. Gender equality objective – provide better WLB for parents and people with care responsibilities

The following indicators ⁽⁹⁹⁾ should be seen as additions to the common indicators included in the annex to the ESF+ regulation, and in the annex to the ERDF and CF. In addition to those included in the regulations, the following indicators involve a more qualitative approach and are designed to be relevant for measuring progress on gender equality. These indicators can be used at the project level, but also at the national level as part of OPs.

1. Output indicators

- Increased provision of publicly funded, flexible and high-quality childcare services.
- Increased provision of flexible, affordable and high-quality care for older people, including digital technologies, shared care and intergenerational care services.
- Increased provision of publicly funded, flexible and high-quality services for persons living with disabilities, including children.
- Increased allocation of spending on developing the care workforce across social care, care for older people and childcare.
- Increased access to care facilities and services to support participation in the labour market.
- Increased employers'/businesses' practices to support flexible work and alternative working arrangements.
- Increased autonomy for employees to set up their own working-time arrangements.
- Increased participation by men in care-related occupations and improved terms and conditions for women and men workers throughout the care sector.

2. Results indicators

- Increased proportion of men's time in care-related activities.
- Increased employment for women and men in formal care work.
- Improved terms and conditions for women and men workers in the care sector.
- Increased access to, and hours in paid work, for women, including migrant women.
- Increased use of alternative working arrangements.

3. Impact indicators

- More equitable division of care.
- More equitable time use between women and men.
- Increased economic, physical and psychological well-being and health for women and men, including migrant women and men.
- Increased tax revenue from the expanded workforce and (gender desegregated) care sector.
- Increased economic outputs through expanded employment.

⁽⁹⁸⁾ Adapted from Fitzgerald, R. and Michie, R. (2000), 'Experiences, good practice and lessons for evaluating gender equality outcomes in structural fund programmes.', Evaluation for Quality, Conference Edinburgh 17–19 September 2000, European Policies Research Centre. Available at: https://ec.europa.eu/regional_policy/archive/sources/docconf/edimbourg/pdf/fitzg_en.pdf

⁽⁹⁹⁾ These indicators are only examples. The indicators should be constructed as numbers and/or percentages. It is preferable to focus on percentages, since simple numbers are not ideal for indicators.

5.4. Fictional case studies on applying the model's steps

5.4.1. Fictional case study 1: reconciling paid work and childcare

Step 1: Understand the dynamics

Ines is a 36-year-old woman with a 3-year-old son. She is a single parent working full-time in a professional role in an SME. Her son attends the local, publicly funded nursery 5 days per week, from 8.00 a.m. to 4.00 p.m. Ines earns around EUR 35 000 each year. Childcare payments are EUR 1 230 per month.

Ines's informal childcare options are limited, as she lives in a large city after moving back to her home country. Her social networks are limited, particularly as her family lives in her home town, some 180 km away in the countryside. She has to top up publicly funded childcare for 3 days each week, as she works until 6.00 p.m. to compensate for leaving at 3.30 p.m. on other days. She pays an informal carer EUR 600 a month in cash. Of her monthly income of EUR 2 916, she pays EUR 1 830 for childcare. That is 63 % of her pre-tax earnings, just short of the OECD average* of 67 % of household income spent on childcare. As the OECD average is based on two children, costs are higher for single parents with one child. Considering the differential in earnings as a consequence of the gender pay gap, single mothers can pay a higher proportion of their income on childcare. Women represent 92 % of single parents.

Step 2: Identify gender-aware actions and responses

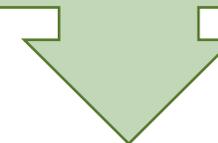
From the range of possible interventions under the ESF+ and/or ERDF for work-life balance, what ESF+- and ERDF-funded actions would make a difference to Ines's work-life balance?

What data do you need to develop programmes and projects that address financial and time pressures on working parents like Ines? What data do you have on preschool children? What data do you have on parents and single parents in employment? What public funding provision is there for childcare? What transport and other infrastructure actions would ease these pressures?

Step 3: Take action

Examples of possible interventions include:

- Consider childcare provision as part of business infrastructure for SMEs (policy objective 1)
- Consider what transport links, including cycling and multimodal working exist for people who have to cross the city to work (ERDF policy objective 3)
- Reflect on what additional actions under the ERDF can supplement policy objective 4's interventions on infrastructure for early childhood childcare.



According to the Organisation for Economic Co-Operation and Development (OECD), many young people who experience difficulties in accessing training and employment,

have no choice because they cannot access or afford childcare for their small children. There is typically a greater, more affordable provision for older children. Indeed, affordable childcare and child-friendly employment arrangements are key requirements for greater labour market participation among young mothers ⁽¹⁰⁰⁾.

Denmark operates a system whereby municipalities are obliged to offer all children over 6-months-old a place in publicly subsidised childcare. In Sweden, municipalities must provide at least 15 hours of childcare per week to children over the age of one. This obligation rises to full-time hours in cases where both parents are employed or in education. Other countries provide additional support for single parents. For instance, Iceland – specifically Reykjavik – provides reduced childcare fees, while the Flanders region in Belgium provides priority access to childcare services for single parents ⁽¹⁰¹⁾.

⁽¹⁰⁰⁾ OECD (2016), *Society at a Glance 2016 – OECD social indicators*, OECD Publishing, Paris. Available at: <https://www.oecd-ilibrary.org/docserver/9789264261488-en.pdf?expires=1556534111&id=id&accname=guest&checksum=95501AF-DCFF10408BD2D4F4FF6DB5E69>

⁽¹⁰¹⁾ *Ibid.*

5.4.2. Fictional case study 2: reconciling shift work and childcare

Step 1: Understand the dynamics

Agneta is 23 years old and has three children under the age of 5. She works part-time in a local shop, and her husband works shifts in a local factory. They live in a small rural town, with a monthly income of EUR 1 300. They will not be able to access publicly funded childcare for all of their children. Currently, they can access some provision for their eldest child. Yet, sometimes, Agneta's hours change and the family has to rely on friends when both she and her husband are working. Their parents live an hour away by car and public transport to their village is very limited.

Getting the data on how many people are in such precarious circumstances of low wages and unstable employment conditions is not always straightforward. Tools such as EIGE's [Gender Equality Index](#) can help, as do local sources of labour market data, housing and child benefit statistics, public transport availability, time use, and data on the use of infrastructure and public spaces.

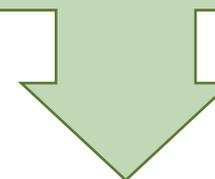
Data on EU averages are not always comprehensive, but it is possible to identify some data that offer comparisons between countries and regions. This allows you to aggregate and estimate local needs in the context of local services, existing public services and social security. Look at the example of rural Germany, where transport, local employment, industrial sectors, local transport and local service provision all informed operational plans in Mecklenburg-Western Pomerania. Here, ESF+ interventions identified support for shift workers and other families with complex, everyday pressures on time, childcare and other care needs as key priorities.

Step 2: Identify gender-aware actions and responses

From the range of possible interventions under the ESF+ and/or ERDF for work-life balance, what ESF+- and ERDF-funded actions would make a difference to this family, supporting them to access childcare and secure better-paid jobs that balance shift work and local transport issues?

Step 3: Take action

- Infrastructure for early childhood education and care
- Infrastructure for vocational education, training and adult learning
- Measures to improve access to employment
- Measures to promote women's labour market participation and reduce gender-based segregation in the labour market
- Promoting the social integration of people at risk of poverty or social exclusion, including the most deprived and children
- Under policy objective 4, possible investment in the construction of childcare and social care facilities, as well as the expansion of the care workforce.



5.4.3. Fictional case study 3: balancing care for oneself and others

Step 1: Understand the dynamics

Tomás is a 74-year-old retired payroll clerk. His monthly income of EUR 850 is just over Spain's national minimum of EUR 785 (*). He is a full-time carer for 73-year-old Isabel, his wife of 52 years. Her long-term illness has left her with multiple care needs.

In Spain, 16 % of men are over the age of 65, as are 31 % of women. The average life expectancy is 80.5 years for men and 86.3 for women (**). Although Isabel has been unwell for a long time, Tomás is worried that she might outlive him. After all, he is older and being a long-term carer has an impact on carers' life expectancies.

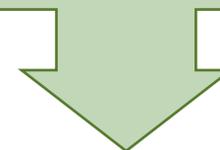
Tomás and Isabel live on the outskirts of a large city, with regular transport links into the city. Their son and daughter live at opposite ends of the city. They have four grandchildren, aged 12-19, who are in full-time education. Their daughter, Asunción, works part-time so she can help her father with household chores and her mother's medical appointments. Their son, Miguel, visits at weekends and is on call for evening emergencies.

Step 2: Identify gender-aware actions and responses

From the range of possible interventions under the ESF+ and/or ERDF for work-life balance, what ESF+- and ERDF-funded actions would make a difference to Tomás and Isabel, and their family, by providing peace of mind and easing the pressures of balancing work and family life?

Step 3: Take action

- Under the ERDF, clean urban transport infrastructure is a priority
- Other social infrastructure that contributes to social inclusion in the community is possible under ESF+ policy objective 3, as are provisions for improving health infrastructure, including the digitisation of healthcare and measures to improve access to long-term care (excluding infrastructure). Additional ERDF support could be allocated to support technical innovation by health and social care SMEs
- Funded interventions that enable people to balance intergenerational care needs with work and individual household needs could include improvements in communications technology to allow remote care and support; the online ordering of prescriptions and household necessities; and intergenerational care facilities at local level – funded and managed by the public sector – to take pressure off families and provide respite for carers. This is key for women, who often work part-time to meet the care needs of others.



* Organisation for Economic Co-operation and Development (2017), *Pensions at a Glance 2017: Country profiles — Spain*, OECD, Paris. Available at: <https://www.oecd.org/els/public-pensions/PAG2017-country-profile-Spain.pdf>

** Eurostat (2018), *The life of women and men in Europe: A statistical portrait*, 2018 edition, EU, Brussels, Section 1.1. Available at: <https://www.ine.es/prodyser/myhue18/bloc-1a.html?lang=en>

5.4.4. Fictional case study 4: reconciling care for children and older persons with shift work

Step 1: Understand the dynamics

Tasheen and Imran, aged 22 and 26, are first-generation immigrants living on the outskirts of a major European capital. They have two children: a 3-year-old and a 6-month-old. Tasheen does not work outside the home and does not drive. Imran works shifts in a local restaurant. Tasheen's mother, Bushra, and siblings have recently come to live in the same neighbourhood, but her mother is 74 and has dementia and diabetes.

Tasheen has a high school diploma and Imran has a degree in computer engineering. They would both like to find jobs suited to their skills and potential, but need support to develop their local language skills and prepare CVs.

Step 2: Identify gender-aware actions and responses

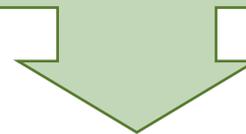
From the range of possible interventions under the ESF+ and/or ERDF for work-life balance, what ESF+ and ERDF-funded actions would make a difference to Tasheen and Imran, supporting them to access paid employment, childcare, local care services for Tasheen's mother, and safe and secure housing?

What data can you identify on the skills, income levels and household types of migrants and other groups who may live in marginalised conditions? What consultations and engagement might you undertake to better understand the needs and aspirations of these groups?

Step 3: Take action

- Policy objective 1 is the main ERDF priority, supporting interventions on skills development, smart specialisation, industrial transition, entrepreneurship, SME incubation and spin-offs.
- This combines with ESF+ measures for:
 - support for the social economy, social enterprises and housing infrastructure for migrants and refugees;
 - other social infrastructure that contributes to social inclusion in the community;
 - health infrastructure;
 - measures to improve access to employment;
 - support for tertiary education (excluding infrastructure);
 - support for adult education (excluding infrastructure);
 - measures to promote equal opportunities and active participation in society;
 - pathways for integration and re-entry into employment for disadvantaged people;
 - measures to improve access for marginalised groups;
 - measures to improve access to long-term care (excluding infrastructure);
 - measures to modernise social protection systems, including access to social protection.

There are multiple interventions that would support Tasheen and Imran, and their extended family, to access training and labour market opportunities; meet their needs for housing, integration, and social protection; and facilitate their contribution to the local economy. Accurate, comprehensive local data — disaggregated by sex, age, disability, race and ethnicity — are essential to inform well-targeted, localised projects and programmes that meet the complex needs of all, and realise their full potential.



This practical model supports innovative practice to realise the potential of the EU Funds in the promotion of WLB. It does this by focusing on the transformation of roles and responsibilities in formal and informal care structures.

The application of this model enables the use of

EU Funds to deliver gender equality outcomes. It facilitates the implementation of gender mainstreaming to formulate and fund gender-responsive interventions advancing WLB. It can also help ensure EU Fund objectives are reached, as gender mainstreaming contributes to more effective planning, implementation and monitoring.

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