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### Money, empowerment and neglect: the Europeanization of gender equality promotion in Greek and Portuguese employment policies

Zartaloudis, Sotirios

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# **Money, empowerment and neglect: the Europeanization of gender equality promotion in Greek and Portuguese employment policies**

## **Abstract**

This article examines the impact of the European Employment Strategy (EES) on Greek and Portuguese employment policies (GEP and PEP respectively) with regard to gender equality promotion during 1995-2009. It focuses on the three main EES goals of gender mainstreaming, reconciliation of work and family, and reducing gender pay gaps, drawing on 44 semi-structured interviews, official documents and the academic literature. The first part discusses the content of GEP and PEP before the introduction of the EES, arguing that gender equality promotion was absent in both countries. The second part examines the reforms promoting gender equality in GEP and PEP after the introduction of the EES in 1997, arguing that both countries implemented a substantial policy change which can be observed in two areas: first, expanding training and providing start-up subsidies for women, and second, expanding care facilities to promote the reconciliation of work and family life. In the third part it is argued that these reforms were linked to the EES and that the Europeanization of GEP occurred through the European Social Fund's conditionality, whereas in the case of PEP Europeanization occurred through the external empowerment of domestic policy entrepreneurs who used the EES to promote their pro-gender equality agenda. Overall, in both countries the EU caused a considerable but not transformative change in their welfare states, with the EES constituting the key driver of pro-gender equality reforms in employment policy.

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## **Introduction**

The literature on the Europeanization of welfare states is growing rapidly (for a review, see Graziano et al. 2011: 1-5) as the European Union (EU) is becoming increasingly relevant for domestic social policy. The Open Method of Coordination (OMC) has featured prominently in this literature as it has become one of the main ways in which the EU is trying to influence national policy on employment, social exclusion, social security and pensions (de la Porte and Pochet 2012; Graziano et al. 2011; Heidenreich and Zeitlin 2009; Kvist and Saari 2007). This article examines the impact of the European Employment Strategy (EES) on Greek and Portuguese employment policies (GEP and PEP, respectively) with regard to gender equality promotion in employment policy during 1995-2009. It focuses on three areas of the EES: gender mainstreaming (GM), reconciliation of work and family and reducing gender pay gaps (GPGs). The empirical analysis uses data drawn from 44 semi-structured interviews, official documents and the academic literature. Greece and Portugal constitute two under-researched and least-likely critical cases of EES-induced policy change (Zartaloudis 2013: 1179). Thus, this study presents novel findings with relevance to all EU member states.

The article is divided into four parts. The first part discusses the content of GEP and PEP before the introduction of the EES, arguing that gender equality promotion was absent in both countries. The second part examines the reforms promoting gender equality in GEP and PEP after the introduction of the EES in 1997, arguing that both countries implemented a substantial policy change which can be observed in two areas: (i) expanding training and providing start-up subsidies for women and (ii) expanding care facilities to promote the reconciliation of work and family life. The third part argues that these reforms were linked to the EES, and that the EES impact on GEP occurred through the European Social Fund's (ESF's) conditionality, whereas in the case of Portugal Europeanization occurred through the

external empowerment of domestic policy entrepreneurs who used the EES to promote their pro-gender equality agenda. In both countries, the EES caused a considerable but not transformative change in their welfare states with the EES constituting the key driver of pro-gender equality reforms in employment policy.

## **1. Variables and theoretical framework**

This article understands Europeanization as a process resulting in an EU-induced impact on domestic (employment) policy (Radaelli 2003; Moumoutzis 2011). Drawing on recent studies on the impact of the EES on member states' employment policies (Zartaloudis 2013: 1179-1182), Europeanization can occur via three key mutually exclusive channels:

1. *policy learning* (whereby domestic change results from a new, EES-inspired governmental agenda which differs from the previous one with regard to the content of national employment policy);
2. *domestic empowerment* (whereby domestic change results from policymakers who exploit the EES in order to promote their own agenda);
3. financial conditionality (whereby domestic change results from attempts to meet the conditions for ESF funding).

The independent variable is the EES which comprises two types of Europeanization stimuli. First, the EES makes use of non-legally binding 'soft' instruments, such as guidelines, benchmarks and country-specific recommendations. Second, the EES makes use of ESF funding as Article 8 of Council Regulation 1260/99 transformed the ESF into the financial arm of the EES by requiring ESF projects to promote EES goals. In the area of gender equality promotion in employment policy the EES established three main policy goals for member states to achieve (Rubery 2002; Walby 2004): the promotion of GM

(guideline 18), the reconciliation of work and family or personal life (guideline 17) and the reduction of GPG's between men and women.

The EES GM stimulus stressed that member states should provide (Velluti 2012: 97):

1. equal access to Active Labour Market Policies (ALMPs) for unemployed women and men and
2. assessment of the gender impact of tax and benefit systems which required member states to establish an appropriate monitoring system to assess how existing policies affected the life and labour market position of both genders (cf. Rubery 2002).

The work/family reconciliation stimulus encompasses a variety of policy options, such as parental leave, flexible working time arrangements, and childcare provision (cf. Jacquot et al. 2011). This article will focus only on the latter as the other policy options may be linked with other EU and EES stimuli such as the EU parental leave directives and the EES adaptability stimulus (Zartaloudis 2014a: 29). In 2002, the EES introduced the Barcelona targets for childcare provision which required member states to provide childcare for at least 90per cent of children aged between three and the mandatory school age and at least 33per cent of children aged below three by 2010. The GPG EES stimulus prescribed the reduction of pay differentials between men and women which required a multi-dimensional policy response from member states including legislative measures promoting equal pay, information campaigns about pay structures, encouragement for women to enter male-dominated professions through vocational training and educational programmes against gender stereotypes, the introduction of quotas in professions and management positions and a higher minimum wage as more women are employed in low-paid jobs (Plantenga and Remery 2006).

The dependent variable of this study is the content of Greek and Portuguese employment policy with regard to gender equality promotion in employment policy. The indicators used to measure EES-induced change in national employment policy are: 1) the introduction of GM as defined above (ALMPs and evaluation of public policies); 2) the promotion of childcare facilities; 3) the reduction of GPGs. EES-induced change is measured by an ordinal scale whereby Radaelli's (2003: 37) typology of Europeanization outcomes<sup>1</sup> and Hall's (1993) typology of policy change<sup>2</sup> are combined to produce a three point scale of EES-induced domestic change (Zartaloudis 2013: 1182). In particular, if the policy response to EES stimuli consists of modifications of part(s) of an existing programme without the overhaul of the programme, the observed change will be classified as first-order change or absorption. For instance, if only parts of existing programmes or policies are altered to include GM because of the EES, then this change will be classified as first order change or absorption. If EES stimuli result in the complete overhaul of existing programmes and/or the introduction of new programmes that incorporate the principle of GM then the change will be classified as second order or upgrading/accommodation. Lastly, if EES-induced change results in the replacement of the existing goals of national employment policy such that gender mainstreaming becomes prioritized as the key strategy to promote gender equality within national employment policy, then the change will be classified as third order change or transformation. The same criteria apply to the other two areas of reconciliation of work and family life and pay gaps.

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<sup>1</sup> Radaelli (2003) has identified five possible outcomes: Inertia; absorption; accommodation/upgrading; transformation; and retrenchment.

<sup>2</sup> Hall (1993) suggested three types of policy change: first-order change (change in the settings of policy instruments); second-order change (change of policy instruments); and third-order change (in addition to settings and instruments, the hierarchy of policy goals change).

Empirical research did not presuppose the occurrence of Europeanization. Bottom-up process tracing was used in this study (see Exadaktylos and Radaelli 2009: 510) without disregarding other external (e.g. the UN's Beijing Platform for action) and/or internal (e.g. domestic agendas) variables. The study triangulated different types of evidence drawn from: 1) forty-four semi-structured interviews with key policy makers, independent experts and trade unionists involved in national and European policy-making conducted during March 2009-September 2010; 2) EU and national official documents; and 3) the academic and policy literature.

## **2. Gender equality promotion in Greece and Portugal before the European Employment Strategy**

This part discusses the content of GEP and PEP before the introduction of the EES arguing that gender equality promotion was absent in both countries.

### *Greece*

Gender equality promotion was absent from GEP until the mid-1990s for a number of reasons. First, welfare provision in Greece has traditionally been restricted to scant measures taken in cases of emergency. This piecemeal development of the welfare state in Greece did not allow for long-term planning for employment policy (Petmesidou 1991). Second, the structure of Greece's predominantly agrarian economy did not necessitate gender equality in GEP, as the majority of working women were employed as informal family labour in the agricultural sector (Karamessini 2006). Third, Greece's weak feminist movement did not succeed in eliciting action from the state on this issue (Marinakou 1998). Fourth, the pro-gender equality governments of the Greek Socialists during the 1980s focused mainly on

equal rights, family and reproductive health issues and neglected gender equality promotion in GEP (Karamessini 2006: 239; Marinakou 1998).

Gender equality promotion appeared in GEP only after EU accession in 1981. In particular, the EU influenced GEP in the early 1980s in two ways (Karamessini 2006): (i) through its anti-discrimination and equal pay legislation and (ii) through EU-funded ALMPs. The latter resulted in the recognition of women as a priority group and the provision of support for the first time in the history of GEP. Nevertheless, gender equality did not become embedded in GEP. In fact, it remained confined to EU vocational programmes (programmes financed either in part or in full or the EU). This is quite surprising given the particularly unfavourable labour market conditions for women. Since the early 1990s, Greek female employment rates have been very low (compared to male employment rates, which had been above 70per cent throughout the 1990s and 2000s) and the Greek labour market has had one of the highest GPGs in the EU (Rubery et al. 2004; 2006).

In sum, despite Greece's poor labour market performance for women and some significant attempts to address it during the 1980s, gender equality promotion in GEP was absent prior to the introduction of the EES in 1997.

### *Portugal*

Portugal witnessed considerable changes in its labour law after the Carnation Revolution and the process of democratization in the late 1970s relating to the abolition of sex discrimination (Royo 2003: 22). Prior to EU accession in 1986, the country also implemented significant reforms relating to parental leave and the very restrictive legalization on abortion in 1984. Nevertheless, in a similar fashion to Greece, gender employment promotion in PEP was absent until the mid-1990s although for different reasons. First, the relatively good labour market conditions for women – especially with



regard to employment levels (usually above 60 per cent) – prevented gender equality promotion in employment policy from emerging as a worthwhile policy goal (interviews with Portuguese Labour Ministry officials PT-LM). Secondly, gender equality was neglected by the centre-right governments of 1985-1995, which showed considerable conservatism in the matter of promoting gender equality (Wall and Leitão 2008; interviews with independent experts). Similarly to Greece, after EU accession gender equality promotion in PEP occurred via EU directives on equal pay and EU-funded ALMPs. Contrary to Greece, however, in Portugal EU funding dedicated to gender equality was miniscule compared to other areas (Pedroso 2005), seemingly because of the different situation of women in each country: Greece had one of the lowest female employment rates, while Portugal was amongst the best performers in the EU15 (interviews with PT-LM; Rubery et al 2004, 2006).

Given that the reconciliation of work and private life became one of the EES mantras, Portugal's social care system is crucial. As in all Southern European countries, social care in Portugal is provided by family members – usually free – while public provision remains rudimentary (Daly and Lewis 2000: 289). With regard to both child and elderly care, Leitner (2003: 359) has classified Portugal's system in the 'implicit familiarism' category, namely a country that 'neither offers de-familisation nor actively supports the caring function of the family through any kind of familialistic policy'. Thus, there is an implicit reliance on family for care provision (Leitner 2003). This constitutes a considerable strain on Portuguese women who have to combine care provision with employment (cf. Zartaloudis 2011). It should be noted that this problem was not equally prevalent in Greece due to the significantly lower female employment rates as well as the more traditional male-breadwinner household model where women were responsible for care provision.

In sum, despite Portugal's very good labour market performance for women and some significant reforms after democratization, gender equality promotion in PEP remained absent until the introduction of the EES.

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### **3. Gender Equality after the European Employment Strategy: gender mainstreaming and reconciliation**

This part of the article examines the reforms promoting gender equality in GEP and PEP after the introduction of the EES in 1997. It argues that both countries implemented a substantial policy change which can be observed in two areas: (i) expanding training and the provision of start-up subsidies for women and (ii) expanding care facilities to promote the reconciliation of work and family life.

#### *Greece*

The first reform in GEP with regard to gender equality promotion took place in 1998 when Greece established two new organizations for providing targeted support to women at a regional level (Karamessini 2006): the *Regional Committees for Equality* which aimed to provide information and counselling to women only and the *Regional Social Integration Units* which were created to support women from marginalized social groups (e.g. Roma women). These new organizations received dedicated funding - mainly from the EU - and employed highly educated staff such as psychologists and career advisers. Nevertheless, the empirical evidence suggests that these organizations were not particularly involved in the promotion of GM as they ended up operating as local advisory and counselling offices without any involvement in employment policy-making (interviews with independent

experts). The only organization that was involved in the evaluation of GEP was the long-standing General Secretariat for Equality (GGI), which began to participate in the Supervision Committees of all EU-funded programmes in 1998. The GGI, however, did not have a considerable input in policy making (interviews with independent experts; Greek Labour Ministry officials [GR-LM]). Consequently, the concept and practice of GM remained absent from GEP until 2000.

The concept of GM was first introduced in GEP in 2001 with the establishment of the *Special Inter-ministerial Committee for Gender Mainstreaming* in an attempt to coordinate ministerial efforts of gender equality promotion. While the creation of this Committee constituted a key institutional innovation with regard to the promotion of GM, it convened only once (Rubery et al. 2004). Nevertheless, in its 2001 National Action Plan (NAP), Greece reported more ALMPs targeting women, and job counsellors were trained to provide better services to unemployed women (Karamessini 2006). In 2002, Greece introduced a global quota of 60 per cent for women in training and employment subsidies, which classified Greece as one of the EU members with strongly gender mainstreamed ALMPs (Rubery et al. 2007). Additionally, new ALMPs were introduced targeting women. Even though some GM measures were reported in the 2003 and 2004 NAPs, the empirical evidence indicates that they were a continuation of previous measures which were taken in 2001 (interviews with GR-LM; independent experts). Furthermore, in 2004, Greece provided gender disaggregated statistics on stocks and flows of registered unemployed along with their participation in ALMPs for the first time in the history of GEP (Rubery et al. 2007: 76, 137-138). Nevertheless, there were no explicit references to GM in subsequent official policy documents.

As was the case with GM, the examination of the Greek NAPs and data drawn from interviews showed that 2001 was the crucial year for the reconciliation of work and family

life. Until then, only a few pilot programmes of secondary significance had been implemented. After 2001, the reconciliation of work and family life was introduced with an exclusive focus on public care services for children and the elderly. The aim was to alleviate the burden of informal care duties for women, which constituted the main obstacle that prevented them from entering the labour market (NAP 2001; NAP 2002). The new measures included (Karamessini 2006): the extension of nurseries' opening hours and the introduction of all-day kindergartens and primary schools; the creation of new crèches, nurseries and kindergartens; the establishment of care centres for the elderly and lastly, the creation of new after-school recreation centres for children. After 2001, the expansion of care facilities and all-day schools continued and by 2006, a total of 1,516 care facilities had been created, employing 6,372 persons and serving 100,000 persons. In addition, by the end of 2006, there were 4,500 all-day schools and 2,000 all-day kindergartens in operation. As several of the policymakers interviewed indicated, all these facilities were created under the influence of the EES and they were funded predominantly by ESF funds (NAP 2006: 45; interviews with GR-LM; independent experts).

Tackling GPGs, however, did not appear to be a major concern for Greek policy makers. Measures for GPG reduction were limited to those funded by the EU, namely initiatives aiming to raise awareness of and produce knowledge on the issue, such as studies on gender gaps and educational programmes aimed at tackling social stereotypes. Most such initiatives appear to have been taken in 2001 and 2006 (NAP 2001-2006). There is no empirical evidence of any other initiatives for the reduction of GPGS.

In sum, the empirical evidence showed that only after 2001 was there a substantial policy change in GEP with regard to gender equality promotion which can be observed in two areas: the expansion of ALMPs to include women and that the expansion of the reach of

care facilities. These changes marked a significant break from the pre-EES model of GEP which had neglected gender equality promotion.

### *Portugal*

The first reform promoting gender equality in PEP was implemented during the 1997 Constitutional revision when gender equality promotion became one of the main responsibilities of the state (article 9, paragraph h). GM, however, was absent from both the post-1995 policy agenda of the centre-left Socialist party (Portuguese acronym: PS) and the 1997 Constitutional reform. GM was introduced only later with the 1997 Global Plan for Equal opportunities, which constituted the first effort of the PS government to promote gender equality in all policy areas (Royo 2003). The next policy document to make reference to GM was the first NAP of 1998. Concrete policy measures, however, were introduced only with the 1999 NAP. The key change was the adaptation of existing ALMPs and the introduction of new ones that were specific to women. After 1999, ALMPs were gradually transformed from a marginal element of PEP into the core tool for boosting female employment (NAP 1999-2002; interviews with PT-LM). Additionally, the PS government introduced a number of subsidies for business start-ups aiming to promote female entrepreneurship. These measures can be considered puzzling in the context of the Portuguese labour market given the high levels of female employment. Portugal also compiled a list of professions which exhibited significant gender discrimination in order to incentivize the participation of women in these professions through more generous financial incentives in the relevant ALMPs (interviews with PT-LM; independent experts). Furthermore, in its 1999 NAP, Portugal committed itself to developing a set of indicators that would allow the monitoring of the collection of evidence from the application of GM in public policy.

In contrast to Greece, Portugal changed its institutional framework for the implementation of GM in PEP significantly by: (i) establishing a new GM committee at the office of the country's President; (ii) upgrading two long-standing Committees with specific competence in equal opportunities and monitoring duties, namely the Committee for Equality in Work and Employment (Portuguese acronym: CITE) and the Committee for Equality and Women's Rights (Portuguese acronym: CEWR) and (iii) appointing equality advisers to government departments to ensure that gender equality promotion was taken into account in all government decisions (Rubery et al. 2001).

After the formation of Juan Manuel Barroso's centre-right PSD-CDS-PP<sup>3</sup> government in 2002, Portugal did not upgrade its GM policies with the exception of a marginal reinforcement of vocational training for women (Rubery et al. 2004: 117). Moreover, the government backtracked on its commitment to restructure the institutions responsible for promoting gender equality policies (the CEWR and the CITE), which it announced in 2002. This restructuring only took place in 2006 after the PS won the national election. Nevertheless, in May 2004 the Portuguese statistical agency launched a Gender Database which constituted a significant improvement with regard to GM promotion (Rubery et al. 2004). This Database included data on approximately 100 indicators disaggregated by gender in a wide range of areas, such as employment, education, decision-making and health. Hence, Portugal diverged significantly from Greece in the establishment of adequate monitoring systems necessary for GM promotion. Similarly to Greece, however, there were no references to GM in the Portuguese National Reform Programmes (NRPs) after 2005.

Contrary to Greece, which started expanding its childcare services after 2001, Portugal introduced the goal of reconciliation of work and family life in 1997 with the 1<sup>st</sup> National Plan for Equality (Portuguese acronym: PNI). Reconciliation was one of the seven key

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<sup>3</sup> In 2002 a coalition government was formed between the PSD and the CDS-PP party (Democratic and Social Centre – People's Party (in Portuguese: Centro Democrático e Social - Partido Popular)).

objectives of the PNI and it would be promoted through educational campaigns, flexibility in working schedules and the creation of care facilities for dependants (children and the elderly) (CEDAW 1999-2008: 9). The PS government also revised article 59 of the Constitution (with articles 1 and 2 of the Constitutional Law 1/97) in order to introduce the right for both men and women to be able to ‘reconcile professional and family life’ (CEDAW 1999-2008: 29).

Moreover, starting in 1998 Portugal expanded substantially its national preschool care facilities network and promoted care services for dependants, provided subsidies to families for the employment of live-in carers (usually immigrant workers taking care of dependants), and established networks of services for home support for dependants (Zartaloudis 2011). Additionally, the 2001 NAP introduced quantitative targets for care facilities that had to be achieved by 2006 in line with the EES Barcelona targets (interviews with PT-LM, independent experts): (i) pre-school education attendance was to be provided to all five year olds and to 75per cent of three to four year olds by building and equipping an additional 1,800 classrooms during that period and (ii) the government was to guarantee that 100,000 children aged up to three would be able to attend day nurseries. This was in stark contrast to the Greek case, as Greek policy makers did not commit to specific quantitative targets and did not seem to respond to the EES Barcelona targets.

After 2002, the PSD-CDS-PP government also extended the operating calendar of pre-school organizations in order to accommodate the needs of families for flexible care. Portugal also introduced a policy of providing financial support for the childcare expenses of unemployed workers. This reform constituted a complete departure from the existing policy of childcare support, which supported care facilities directly rather than providing targeted support to the families most in need (interviews with PT-LM; independent experts). The next reform was reported in the 2006 NRP where the new PS government introduced three new

initiatives to expand care facilities in response to the country-specific recommendation on care facilities that Portugal had received (Zartaloudis 2011). Moreover, primary schools' opening hours were extended to assist women in balancing their work and care commitments (Rubery et al. 2006: 137). Additionally, the 2006 NRP introduced new targets for the provision of care to dependants that had to be achieved by 2009: a 50per cent increase in the number of crèches to 31,161 units (meeting the Barcelona pledge for the provision of childcare facilities for at least 33per cent of children aged up to three) along with the hiring of new staff in care facilities for the elderly and the disabled. It should be noted that approximately 90per cent of care facilities in Portugal were owned by the large non-governmental sector, which was funded almost exclusively by the national government and the Catholic Church (interview with PT-LM; independent experts), with 9per cent of the facilities being privately owned and only the remaining 1per cent being state-owned (Zartaloudis 2011).

On the contrary, the issue of tackling GPGs - as was the case in Greece - did not become particularly salient. This is quite surprising, given that the main problem with meeting EES targets for Portugal was the large pay gap as the country had one of the largest GPGs for workers in the private sector. It should be noted that contrary to Greece, the public sector's GPG was almost eliminated (Rubery et al. 2004: 41). The measures intended to tackle GPGs were implemented after 1998 and they included awareness-raising campaigns and training schemes aiming to alter social attitudes, along with the commissioning of studies to evaluate GPGs in different sectors of the economy. Lastly, Portugal introduced awards for organizations and companies with model policies on gender equality promotion.

In sum, Portugal's labour market was characterised by female employment and unemployment rates very different from those in the Greek labour market. Nevertheless, a similar reform pattern is observable in both countries: in order to promote GM following the



emergence of the EES, Greece and Portugal gave women access to ALMPs aiming to (re-)integrate them into the labour market. Additionally, both countries expanded their care facilities and related social services extensively in order to facilitate the reconciliation of work and family life. Lastly, with regard to GPGs, both countries merely implemented some awareness-raising programmes.

#### **4. Explaining policy change: Europeanization through ESF conditionality and domestic empowerment**

This part of the article examines why Greece and Portugal implemented the reforms analyzed above. It is argued that these reforms were linked to the EES – via ESF conditionality in Greece and via the domestic empowerment of policy entrepreneurs in Portugal.

##### *Greece*

The empirical evidence suggested that Greek policy makers neglected the EES (interviews with GR-LM; independent experts; trade unionists). In the first NAP of 1998, gender equality was not a major concern. Similarly, the introduction of the GM guideline in 1999 had no influence on GEP as no new measures were introduced in response. As argued above, the first change in the area of GM was the creation of a few regional bodies that would provide specialized support to women and the upgrading of the GGI's role in the supervision of EU-funded programmes. Greece presented these changes as a response to the EES GM guideline and country-specific recommendations.

In contrast, the empirical evidence suggested that these changes were linked to the ESF regulations and the demand from the European Commission on Greece to include gender equality promotion in their EU-funded ALMPs (interviews with GR-LM; Greek officials at

ESF [GR-ESF]; independent experts). Subsequently, new funding became available for new local organizations and the GGI was expected to participate in the new EU-funded programmes. These organizational reforms therefore were linked to the need to improve the absorption of ESF funds and not to the promotion of GM in GEP. The fate of the Special Inter-ministerial committee for GM is instructive in this respect. The empirical evidence showed that, since it was not involved in the absorption of ESF funds, it met only once and it did not have any discernible influence on GEP (interviews with GR-LM; independent experts).

Similarly, ESF conditionality seems to be the best explanation for the proliferation of women-friendly ALMPs and counselling after 2001. According to evidence drawn from interviews (see also: Zartaloudis 2014a, 2013), 2001 was the first year of implementation of the new ESF 2000-06 programming period (programmes approved to begin in 2000 actually began in 2001). In other words, domestic change did not occur after the introduction of the EES (1997-98) but only after the introduction of the ESF conditionality. According to evidence collected in interviews with key policymakers in Greece, this was related to the fact that the EES did not result in any learning process and was neglected until the advent of ESF conditionality. In addition, the introduction of a 60per cent quota for women in ALMPs as a measure to promote GM appears to have been a case of delayed compliance with one of the terms of the agreement between the European Commission and the Greek government (interviews with GR-LM; GR-ESF; independent experts).

Tellingly, Greek NAPs included measures which were supposedly introduced as a response to the EES gender equality stimulus but in reality they were not related to gender equality promotion in employment policy. The most striking example of this was the inclusion in the 2002 NAP of the reform concerning the provision of individualized counselling to women. Although the NAP's authors claimed that this was an effect of the

GM guideline, individualized counselling was linked to EES activation stimuli and the reform of Public Employment Services (see Zartaloudis 2013). According to some NAP authors, the practice of listing measures which were not directly related to the GM stimulus was intended to obfuscate Greece's limited response to the relevant EES stimuli beyond the ESF-funded programmes (interviews with GR-LM).

As was the case with GM, the empirical evidence suggests that the expansion of care facilities was not intended to meet EES guidelines and recommendations but ESF conditionality (interviews with GR-LM; GR-ESF; independent experts). Indeed, it was only after 2001 when the ESF conditionality was introduced that the expansion of care facilities and all-day schools began to be fully implemented. Notably, it appears that all new care facilities were financed by ESF funds and in order for Greece to receive them it had to conform to ESF regulations on promoting gender equality (interviews with GR-LM; GR-ESF; independent experts).

Similarly, the evidence suggests that the issue of the GPG was largely neglected by Greek policymakers because there were no ESF funds available for measures intended to address it (interviews with GR-LM; independent experts). The only exception to this rule was measures (training, studies, and awareness programmes) that provided access to ESF funding. The availability of EU funds also appears to explain the timing of the introduction of these measures in 2001 and 2006. After 2001, it was the new ESF programming period that led to the new programmes. In 2006, it was the European pact for gender equality that reiterated the need to close gender gaps and combat social stereotypes (cf. Rubery et al. 2007) and provided new funding for programmes tackling GPGs (interviews with GR-LM; GR-ESF; independent experts) Even though Greece had some of the highest GPGs in Europe (Rubery et al. 2005: 11), it never developed a systematic policy to tackle them.

In terms of the impact of the EES, in the case of GM it can be classified as first order change or absorption as only parts of existing programmes or policies were altered to include gender equality promotion. More specifically, although Greece included women in ALMPs for the first time in its history and set quantitative targets for female training, it did not improve its monitoring and evaluation capabilities – a fundamental prerequisite for GM promotion. In the case of reconciliation, the EES through ESF conditionality resulted in upgrading or accommodation as it led to a major expansion of care facilities and the introduction of new programmes of care for dependants. This change, however, did not constitute a paradigm shift for GEP as promoting reconciliation did not replace pre-EES GEP goals and all this expansion was based on EU funds. In the case of pay gaps, the EES resulted in first order change or absorption as Greek policy makers partially changed a limited number of pre-existing programmes (a few ESF funded measures such as training, evaluation studies, and awareness-raising programmes).

### *Portugal*

According to evidence drawn from interviews, policy change occurred because domestic actors used external stimuli - namely, the UN's Beijing Platform for Action on gender equality (see Rubery 2002) and the EES soft stimuli - to empower themselves and promote their pre-EES gender equality agenda. It appears that these domestic actors were high-level female feminist technocrats or 'femocrats' who held key positions in Portugal's bureaucracy (advisers to the Minister of Employment and/or Heads of Gender Equality bodies) (interviews with independent experts, PT-LM). In particular, the first breakthrough in the promotion of gender equality in PEP (the Global Plan for the Equality of Opportunities) appears to have been Portugal's response to the UN's Beijing Platform for Action (CEDAW 1998-2008: 6). As discussed above, although gender equality had been part

of the government's agenda since 1995, the PS government did not take any concrete action that promoted gender equality in PEP until the emergence of the UN's Beijing Platform which Portugal's femocrats used in order to put pressure on the government to promote gender equality promotion in employment policy (interviews with independent experts). The same applies to the second and third PNIs which, nonetheless, also incorporated EES soft stimuli, namely EES guidelines and countryspecific recommendations (interviews with independent experts).

The evidence collected from interviews suggests that after 1997 the EES replaced the UN's Beijing Platform as the main external influence on gender equality promotion in PEP (interviews with independent experts; PT-LM). More specifically, it was only after the introduction of the GM guideline in 1999 that Portugal: (i) expanded ALMPs to include women; (ii) introduced an advanced system of monitoring and evaluating gender equality in all PEP measures and (iii) tried to change its institutional apparatus within the government (interviews with PT-LM; independent experts).

Similarly, the reconciliation guideline opened a policy window which Portugal's policy entrepreneurs utilized to promote their agenda. This led to the expansion of care facilities which began after 1998 and intensified after the introduction of the Barcelona targets on childcare facilities. The latter apparently became the most important lever for domestic reform as the femocrats could refer to specific EES targets that needed to be achieved by all relevant government ministries and departments (interviews with PT-LM; independent experts).

Nevertheless, Portugal's femocrats faced significant obstacles in pursuing their agenda. The first impediment was their relationship with their political supervisors and especially the ministerial elites who were responsible for PEP who did not consider gender equality promotion a priority (interviews with PT-LM; independent experts; PT-trade unions). This

problem became particularly pertinent during 2002-05 when Portugal's gender equality bodies remained inoperative as Jose Manuel Barroso's centre-right government neglected gender equality promotion (see also Zartaloudis 2011). The second obstacle appears to have been high female employment rates. In the GM case, even though the EES guideline opened up a window of opportunity for domestic policy entrepreneurs, this window closed very quickly as Portugal's female employment rate was higher than the Lisbon targets of 60 per cent for female employment and according to interviewees, Portugal's femocrats could not persuade key ministerial elites that GM constituted a policy priority (interviews with PT-LM; independent experts). This apparently explains why after 2002 there was no substantial progress in GM promotion and demonstrates the low priority given to, and shallow understanding of, this issue by key ministerial elites since, as discussed above, GM is not merely about employment rates. The third obstacle was Portugal's economic model which relied on cheap labour and cork and textile exports. Thus, successive Portuguese governments fiercely resisted reducing GPGs in these industries in order to avoid any potential loss of competitiveness (interviews with PT-LM; trade unionists; independent experts).

The empirical evidence does not provide support for alternative explanations of policy change. As discussed above, despite variation in ideological orientation across Portuguese governments, no government implemented any changes relating to gender equality before the appearance of external stimuli, namely the UN's Beijing agenda and EES soft stimuli. Moreover, the evidence does not provide support for the other two Europeanization pathways. There was no evidence supporting the policy learning pathway as the main actors defining and promoting the Portuguese agenda were committed feminist policy entrepreneurs who had a strong pro-gender agenda before the emergence of the EES. The rest of the bureaucracy and the main ministerial elites responded to the suggestions of these

policy entrepreneurs, but they did not change their views on the priorities of PEP (interviews with PT-LM). Similarly, it appears that ESF financial conditionality was largely irrelevant in the Portuguese case as the GM measures were a response to the relevant EES guideline and Portugal's (new) care facilities were nationally funded (interviews with PT-LM; independent experts).

In terms of impact, in the case of GM the EES caused second order change or accommodation as Portugal for the first time in its history: (i) introduced ALMPs that included women; (ii) developed a monitoring system for GM policies and (iii) implemented an institutional overhaul within the government to promote GM. However, GM did not replace pre-existing goals and content of PEP and thus there was no paradigm shift. In addition, GM was promoted by a small group of femocrats and did not become an all-encompassing goal of Portuguese policymakers. Similarly, the EES produced second order change or accommodation in the case of reconciliation as Portugal implemented an unprecedented expansion of care facilities and achieved the Barcelona targets. In the case of the GPG, however, the EES effect was limited as Portugal - exactly like Greece - implemented mainly sensitization measures such as educational programmes which can be classified as a non-fundamental change in PEP.

In sum, the EES led to a considerable change in PEP with regard to gender equality promotion by empowering domestic policy entrepreneurs (femocrats). The EES led to a higher degree of policy change in Portugal compared to Greece. This suggests that ownership may be more important than conditionality.

## **Conclusion**

This article examines the impact of the EES on Greek and Portuguese employment policies with regard to gender equality promotion during 1995-2009 with a particular focus

on the three main EES goals of GM, reconciliation of work and family life and reduction of GPGs. It is argued that the EES led to a considerable Europeanization of domestic policies which can be observed in two areas: (i) expanding training and provision of start-up subsidies for women and (ii) expanding care facilities. Europeanization occurred in Greece through ESF conditionality while in Portugal via the empowerment of domestic policy entrepreneurs who used the EES to promote their pro-gender equality agenda. Consequently, the EES led to a considerable but not transformative change in the employment policy of both countries and therefore in their welfare states with regard to gender equality promotion.

These findings contribute to the literature in a multi-faceted fashion. First, the EU seems to have upgraded the Greek and Portuguese welfare states with regard to gender equality promotion in employment policy. This is in sharp contrast to: (i) the original expectation of the literature that the EU would pose a threat to national welfare states which may lead to a race to the bottom (Scharpf 2002) and (ii) the effect that EU membership seems to be having on these countries since the start of the economic crisis which has been synonymous with austerity and welfare retrenchment (see Zartaloudis 2014b). Second, the EES seems to have passed the test of influencing two least-likely cases casting doubt on its perception as an instrument too weak to promote domestic change on member states (cf. Scharpf, 2002). Third, this study shows that learning was not relevant for EES-induced Europeanization – a rather surprising fact given the prevalence of this mechanism in the literature (de la Porte and Pochet 2012).

Nevertheless, this study has certain limitations. First, it examined the impact of only one EU instrument in employment policy - the EES - without examining the impact of other EU instruments (see: Jacquot et al. 2011; Velluti 2012). The EES, however, has been one of the key EU instruments in this area and thus the study of its impact is worthwhile. Second, it focused only on Greece and Portugal. Nonetheless, as they are both critical cases the



findings of this study apply to other EU member states. Third, the article focused only on one area of the EES (gender equality promotion) and in one area of welfare state policy (employment). Fourth, the period of examination ended in 2009 because both countries faced a major crisis which ended with the ‘Troika’ (European Central Bank, European Commission and International Monetary Fund) ‘bail-outs’. The latter makes the study of the EES impact very treacherous given that both countries have been obliged to implement a number of changes in their employment policy which go beyond the EES framework (Zartaloudis 2013: 1191).

Existing studies show that after the beginning of the economic crisis, there has been a mixed albeit overall negative effect on gender equality promotion in the EU (Bettio et al. 2012; Elomäki 2012; Karamessini and Rubery 2014). First, GPGs have been reduced as a result of worsening employment and remuneration conditions for men who tend to be employed in sectors more vulnerable to the crisis (e.g. financial services and construction). Second, both genders have been affected by job losses and income reduction with more negative effects for poorer workers who tend to be women. Third, contrary to previous crises, men and women showed similar labour market behavior with women no longer acting as employment buffers (being more active during periods of growth and less active during periods of recession). Fourth, gender equality and especially GM almost disappeared from the policy agenda.

Greece and Portugal have followed these general EU trends (see Karamessini 2014; Ferreira 2014). In addition, both countries have reduced provision and generosity of family care and tax cuts to families. Moreover, public sector workers (a sector with high female employment) have been hit by cuts due to the ongoing austerity (see also Zartaloudis 2014b). Nevertheless, in Greece the ESF maintained efforts for the promotion of gender equality via a national Equality Plan (Karamessini 2014). In Portugal, however, Coelho’s centre-right

government suspended new gender equality programmes at the end of 2011 as part of its austerity programme (Ferreira 2014). Further research is required in order to delineate the role of the EU in these changes vis-a-vis domestic agendas and the adjustment to the new economic context that the ongoing crisis is redefining for these two countries.

Thus, there are at least four avenues for further research with regard to the Europeanization of welfare states, namely the examination of: 1) other EU instruments; 2) other member states; 3) other policy areas; 4) Europeanization effects during the economic crisis.

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