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Call for tender by open procedure n° 2007.CE.16.0.AT.032 concerning the ex post evaluation of cohesion policy programmes 2000-2006 co-financed by the European Fund for Regional Development (Objective 1 and 2)

Work package 7: “Effectiveness of Cohesion Policy: Gender Equality and Demographic Change”

IRS, Istituto per la Ricerca Sociale

CSIL Centre for Industrial Studies

FIRST INTERMEDIATE REPORT

September 2008

Prepared for: **EUROPEAN COMMISSION**
DIRECTORATE-GENERAL
REGIONAL POLICY

Policy development

Disclaimer: This report contains provisional results which may be revised in the Final Report of the study. Quotation is authorised as long as the source is acknowledged and the fact that the results are provisional.

Acronyms

DG REGIO	Directorate General for Regional Policy
EAGGF	European Agricultural Guidance and Guarantee Fund
EC	European Commission
ERDF	European Regional Development Fund
ESF	European Social Fund
EU	European Union
FIFG	Financial Instrument for Fisheries Guidance
GDP	Gross Domestic Product
ICT	Information and Communication Technology
LFS	Labour Force Survey
NTI	New Technologies of Information
OECD	Organisation for Economic Co-operation and Development
R&D	Research and Development
TOR	Terms of Reference
WP	Work Package

TABLE OF CONTENTS

ACRONYMS	2
TABLE OF CONTENTS	3
FOREWORD.....	5
1. REVIEW OF THE LITERATURE ON DEMOGRAPHIC CHANGE AND GENDER EQUALITY (TASK 1.1 AND 1.3).....	6
1.1 Europe: a changing population	6
1.1.1 Demographic change: a key issue for European Union policy	6
1.1.2 European population growth: the present and the future	8
1.1.3 Important role of international migration in population growth and composition.	15
1.1.4 Low, lowest low and late fertility: the Europe of the few children	17
1.1.5 A longer life for the Europeans.....	24
1.1.6 Ageing population and regional policies	29
1.2 Major gender issues facing Europe.....	37
1.2.1 Gender change: a key issue for European Union policy	37
1.2.2 Substantial gender differences in employment rates.....	38
1.2.3 Occupational segregation	40
1.2.4 Gender inequalities in earnings.....	42
1.2.5 Women and men in decision-making positions.....	43
1.2.6 Women’s dual burden.....	44
1.2.7 Work-life balance: the virtuous link between demographic and gender change	45
1.3 Concluding remarks: demographic and gender changes and the ERDF intervention areas.....	46
1.3.1 Gender equality and demographic changes from a policy point of view: main approaches and strategies	50
1.3.1.1 Gender equality	50
1.3.1.2 Demographic change	54
1.3.2 The potential role of ERDF in supporting gender equality and adaptation to demographic change.....	60
2. STATISTICAL ANALYSIS OF THE SPECIFIC DEMOGRAPHIC AND GENDER EQUALITY SITUATION AND TRENDS IN EU REGIONS AND SELECTION OF 20	

	REGIONS WHERE ERDF INTERVENTIONS WERE OR COULD BE RELEVANT IN ADDRESSING THOSE ISSUES (TASK 1.2)	67
2.1	Identification of demographic change and gender equality indicators.....	67
2.2	Descriptive analysis of the demographic and gender equality situation and trends in EU regions according to the indicators identified	73
2.2.1	Demographic change: the regional situation in year 2000 and trends 2000-2006.....	73
2.2.2	Gender equality: the regional situation in year 2000 and trends 2000-2006.....	90
2.3	Ranking and clustering of the EU regions according to the indicators identified	98
2.4	Identification of integrative criteria to select the 20 regions	99
2.4.1	The selected regions	102
3.	SELECTION OF THE 12 REGIONS FOR THE CASE STUDIES	106
3.1	Analysis of the national and regional strategies in the 20 regions in relation to gender equality and demographic change (task 1.3).....	106
3.1.1	Context analysis.....	108
3.1.2	General objectives and design of the strategy	110
3.1.3	Specific objectives and design of the measures	112
3.1.4	Procedures envisaged for the selection of projects, monitoring and evaluation	113
3.2	Preliminary identification of the 12 regional case studies (task 1.4)	114
3.2.1	Impact assessment exercise	115
3.2.2	The selection of the 12 regions for the case studies.....	120
3.2.3	Formulation of hypotheses on ERDF interventions addressing gender equality and demographic change to be tested in the case studies	134
4.	THE CASE STUDY METHODOLOGY: AN INTEGRATION (TASK2)	141
4.1	Aim of the case studies	141
4.2	Methodology.....	141
4.3	Organisation and mini case studies	143
4.4	Data collection plan.....	144
5	UPCOMING ACTIVITIES	146

Foreword

Within the framework of the ex post evaluation of Objective 1 and 2 in the period 2000-2006, IRS and CSIL have been selected for the seventh work package (WP7): “Effectiveness of Cohesion Policy: Gender Equality and Demographic Change”.

Following the approval of the Inception Report, defining the evaluation methodology, this First Intermediate Report presents the outcome of Task 1, with the list of 20 identified regions and the criteria at the basis of the proposed 12 regional case studies. In addition, the Report develops the methodology for the case studies to be carried out in Task 2.

In particular the Report includes:

- A review of the existing literature on national/regional gender equality and demographic change with particular focus on ERDF intervention areas (chapter 1).
- A statistical and descriptive analysis of the specific gender equality and demographic situation and trends in all European regions, in order to identify 20 regions where ERDF interventions were or could be relevant (chapter 2).
- A review of the existing literature and programming documents on the identified 20 regions’ national/regional strategies regarding gender issues and demographic change in order to draw up an initial proposal of 12 regions where ERDF intervention could be relevant in addressing these issues and to identify a number of hypothesis and research questions on ERDF interventions to be tested in the regional case studies (chapter 3).
- Further details on the case study methodology described in the Inception Report, presenting the organisation of the studies, the data collection plan, the timetable and the template to be tested with the first two pilot cases (chapter 4).

1. Review of the literature on demographic change and gender equality (task 1.1 and 1.3)

The aim of Task 1 is to define criteria and methodologies in order to select the 12 regions where the case study analysis will be conducted. According to the ToR, the selected regions should present relevant gender equality and demographic change in the 2000-2006 programming period as interventions addressing these needs are eligible for ERDF support. The literature survey helps to identify some common and national/regional specific trends in gender equality and demographic change. Moreover, the main dimensions and determinants of gender equality and demographic change are analysed with a particular focus on the ERDF intervention areas.

The literature review focuses basically on common trends and country specificities, on the basis of official publications and other policy documents from European Institutions in the framework of Structural Funds and Cohesion Policy. Literature on the effects of different policies on gender equality and demographic change will be also taken into account. Both academic contributions on the determinants of gender gaps and demographic change and comparative analysis produced by international organisations (such as the OECD) will be examined. An essential bibliography of relevant key publications and documentation for both gender equality and demographic change is provided in Annex Ia.

The systematic review of the literature has been facilitated by the use of “analysis grids” (see Annex Ib e Ic), summarising the main findings of the most relevant documents and papers on these topics.

1.1 Europe: a changing population

1.1.1 Demographic change: a key issue for European Union policy

Demographic change is a critical issue for growth and social cohesion policies and indeed Europe must confront the profound changes in its population size and structure. However, awareness of its relevance has been growing since the second half of the 2000-2006 programming period. For this reason, while gender equality was explicitly included as a priority of the Structural Funds interventions in 2000-2006, the adaptation to demographic change came up as a priority on the European policy agenda only during the implementation period.

There are two major issues that, with varying degree, all European Countries must address population decline and population ageing. Immigration can be a solution only in the short term for population decline, but not for population ageing, as immigrants as a whole are also an ageing population. The implications of demographic change for the economic system will be critical. During the coming decade, baby boom cohorts will begin to retire from the labour market. Young cohorts entering the labour market will be much smaller as a result of prolonged low fertility. In about ten years, total employment in the EU could begin to decline, in spite of rising employment rates. Europe's potential growth rate could therefore decline at a time when significant additional resources will be required to meet the needs of an increasing number of elderly people for whom both adequate pensions and health care provisions will have to be offered. Among the possible solutions envisaged, migration and increasing participation of both women and the older people into the labour market are encouraged, as outlined in the Lisbon Strategy. In this respect, adequate reconciliation and gender policies might be useful measures that allow women to work while caring for their children and older family members.

In the Green Paper, "Confronting Demographic Change," which was published in March 2005, the Commission initiated a debate on the need to focus on demographic change and to strengthen solidarity between the generations. In its Communication of 12 October 2006, on "The demographic future of Europe – from challenge to opportunity" (COM/2006/571, European Commission 2006a), the Commission presented its views on the demographic challenge and approaches for addressing it. The Commission emphasised the need for the Member States of the European Union to promote demographic renewal, linking their action to the renewed Lisbon Strategy for growth and jobs and following up gender equality policy. By improving family life conditions, particularly by balancing professional and private life, Member States could help Europeans to have their ideal number of children. Moreover, the Commission expressed confidence in Europe's ability to cope with the demographic challenge and presented five key areas in which there are major opportunities for constructive policy responses:

- promoting demographic renewal in Europe;
- promoting employment in Europe: more jobs and longer working lives of better quality;
- a more productive and dynamic Europe;
- receiving and integrating migrants in Europe; and
- sustainable public finances to guarantee adequate social protection and equity between the generations.

In 2007, the first biennial report on the demographic future of Europe, titled: "Europe's demographic future: facts and figures" (European Commission 2007), was published. It summarises the extensive analytical work that was carried out prior to the adoption of the communication on Europe's demographic future (COM/2006/571) in the first demographic forum in October 2006. The aim of this report is to present the main facts and figures that underpin the debate on Europe's demographic future and to discuss appropriate policy responses.

The EU heads of state and government decided at their spring 2007 meeting to establish a *European Alliance for Families* that will serve as a platform for the exchange of views and experience on family-friendly policies and good practices between Member States. The Commission set out in its Communication “Promoting solidarity between generations”, which was adopted in May 2007 (COM/2007/244 final), how to support the European Alliance for Families. In its Communication, the Commission identified areas where Member States, social partners and civil society as well as the EU can play an important role in supporting the quality of life of families.

European Regions are also fully engaged in these issues, as witnessed by the DG REGIO conference in January 2007 on “Regional responses to demographic challenges”. “EU regions appear to have understood the challenges raised by on-going demographic changes and their likely consequences on public needs and demands. Accordingly, they have started to adapt their strategies and have introduced new tools, in particular in the fields of infrastructures and provision of public goods and services” (European Commission, Directorate-General for Regional Policy 2007). Therefore, understanding regional variations in demographic trends is a key issue to prepare the European society to confront this demographic challenge.

The following literature review begins by presenting the main facts concerning demographic changes in Europe with regards to fertility, life expectancy and migration and places these issues into a long term and global perspective. Drivers of demographic change and consequences will be also briefly discussed in this section, with a special focus on gender, low fertility and ageing and their impacts on the future wellbeing of the European population. The potential of family and employment policies on demographic changes will be also addressed.

1.1.2 European population growth: the present and the future

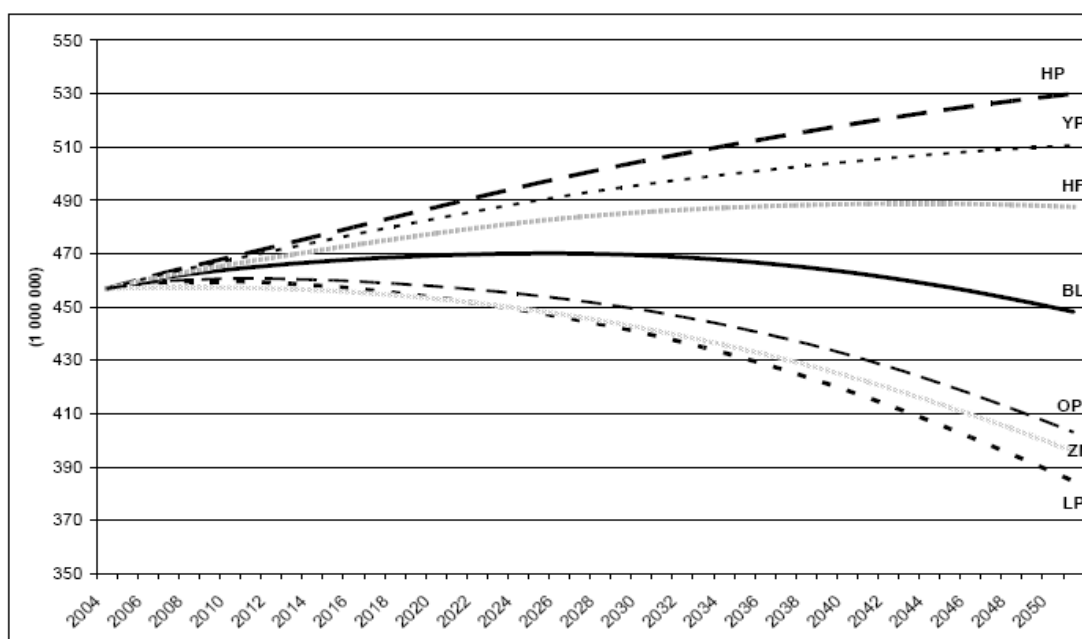
A century ago, some 15% of the world population lived in the area of the EU-25 between 2000-2006; nowadays this share is 7% and by the year 2050 the share of the EU-25 in the total world population is projected to be around 5%, according to the 2004 revision of UN population projections. It should be stressed that Europe is the only major world region where population is projected to decline.

During the last four decades, the population of the 25 countries of European Union has grown from over 406 million people (1970) to over 461 million people (2005). The average annual population change rate for the years 2000-2005 is 4.1 per thousands, of which only 0.7 is caused by natural increase and the remaining 3.4 by net migration from outside EU. The “natural increase” of the population is defined as the number of life births minus the one of deaths during a given year. Until the end of the 1980s, the “natural increase” was by far the major component of population growth. However, there has been a sustained decline of the “natural increase”. On the other hand, international migration has become the major source of population growth from the beginning of the 1990s onwards. The share of international migration in European population growth is in fact still increasing. Overall, a further slowing

down of natural population growth is to be expected in the next years and from around 2010 onwards, natural population decline will occur for the European Union as a whole (European Commission 2007, Lanzieri 2006).

From these trends, it is plausible to argue that one of the most important future demographic challenges for the European Union is population decline. Europe will become the first among major world regions in breaking new ground, as the rate of European Union population growth is the lowest among the major regions in the world. By the year 2050, the population of the European Union-25 is expected to have declined from its current 461 million inhabitants to 450 million, according to the baseline variant¹ (Eurostat, EUROPOP 2004, Lanzieri 2006) (Figure 1.2). The starting year of the population decrease according the same variant is 2025. Under the hypothesis of no migration, the decreasing trend would begin in 2008 (Eurostat, EUROPOP 2004, Lanzieri 2006) (Figure 1.1).

Figure 1.1: Projected total population, Trend scenario variants, EU-25, 2004-2051. Source: Eurostat, EUROPOP2004



Note: ZM: zero migration hypothesis; BL: Baseline hypothesis

Source: Lanzieri 2007

The overall demographic change in the European Union shows a rather stable pattern although important differences between Member States do persist (Table 1.1). The old Member States on average have experienced a slow population growth. With just a few exceptions, natural change

¹ The Eurostat population projections presented here correspond to the baseline variant of the Trend scenario. The current Trend scenario does not take into account any future measures that could influence demographic trends and comprises a combinations of the base assumptions for the respective components, i.e. fertility, mortality and net migration. These assumptions can be summarised by means of indicators such as total fertility rate (TFR), life expectancy at birth and net migration. For a more detailed explanation see: Lanzieri 2006.

is close to zero or even negative, while net migration is the only force driving population increases. In 2000-05, Cyprus and Ireland experienced the fastest rate of population growth in the European Union (close to 2%), but Spain and Malta also experienced a population growth rate of over 1%. Among the new Member States, Romania, Hungary, Slovakia and Poland experienced a slight decline of population, while the decline in the Baltic States is over 3 per thousand. In these countries, negative natural population change is not counterbalanced by positive adequate net migrations (Table 1.1).

Table 1.1: Demographic Change in Europe per 1,000 inhabitants. Average for the years 2000 to 2005

	Total population change	Natural change ²⁾	Net migration ³⁾
EU-25	4.1	0.7	3.4
Euro area	:	:	:
BE	4.1	1.0	3.1
CZ	-0.4	-1.3	0.9
DK	3.0	1.4	1.6
DE	0.8	-1.4	1.9
EE	-3.8	-3.8	0.0
EL	3.1	-0.1	3.2
ES	14.8	1.4	13.3
FR	5.3	3.9	1.4
IE	17.4	7.9	9.6
IT	5.3	-0.3	5.6
CY	18.9	4.2	14.7
LV	-6.2	-5.2	-1.1
LT	-5.3	-2.9	-2.4
LU	9.2	3.8	5.4
HU	-2.4	-3.7	1.4
MT	10.8	2.4	8.3
NL	4.9	3.7	1.2
AT	5.5	0.2	5.3
PL	-0.5	-0.1	-0.4
PT	6.1	0.8	5.3
SI	1.3	-0.6	1.9
SK	-0.3	0.1	-0.4
FI	2.7	1.5	1.1
SE	3.4	0.3	3.0
UK	4.4	1.5	2.9
BG	-5.7	-5.5	-0.1
HR	-4.5	-2.1	-2.4
MK	:	:	:
RO	-2.3	-2.0	-0.3
TR	:	:	:
IS	10.2	8.1	2.0
LI	12.3	5.2	7.0
NO	6.1	3.1	2.9
CH	6.8	1.6	5.2

Notes: 1) Average annual population change during the period 2000 to 2004 divided by the average of the mid-year population figures for of the respective five years. 2) Live births minus deaths. 3) Net migration has been calculated as the difference between total population change minus natural change. Including corrections.

Source: Statistics in pocket 2007

The excess of births over deaths (positive natural growth) is highest in Ireland, at about 8 per thousand, while Cyprus, in France and the Netherlands have 4 per thousand (Table 1.1 e 1.2). Many EU members have been experiencing a negative “natural population change” since the beginning of the decade (i.e. more people have died than have been born) (European Commission 2007). This negative pattern can be found in Germany, the Czech Republic, Slovakia, Hungary, Slovenia and adjacent regions, as well as in the Baltic States and Sweden, to the north, and Greece, in the south. In some regions, a negative natural change has been offset by positive net migration. This is most conspicuous in western Germany, eastern Austria, in the north of Italy, in Slovenia, as well as the southern regions of Sweden, Spain, Greece and the United Kingdom (Table 1.1 e 1.2). Only in a few regions (namely in the north of Poland), has a positive “natural change” been offset by negative net migration (European Commission 2007).

Table 1.2: Pattern of population change for European Union Countries: 2000-2005

		NATURAL CHANGE	
		Positive	Negative
NET MIGRATION	Positive	Eu25 Belgium Denmark France Ireland Cyprus Malta Austria Netherlands Portugal Finland UK Luxembourg	Italy Greece Spain Czech Republic Germany Slovenia
	Negative	Slovakia	Latvia Lithuania Estonia Romania Hungary Poland

Source: Elaboration on Statistical Eurostat Pocketbook 2007

Eurostat projections (Eurostat EUROPOP 2004) – by taking the “baseline” variant as a reference – predict that population decline is not a common outcome for the entire European Union: in fact, 12 of the 25 Member States are expected to have population growth by 2050 (Table 1.3). Of those, France, Ireland, Cyprus, Luxembourg and Sweden will also have positive natural change. For France and Ireland, positive natural change will be even higher than assumed net migration. Eastern and Baltic countries on the other hand are expected to show a significant decrease in population (Table 1.3).

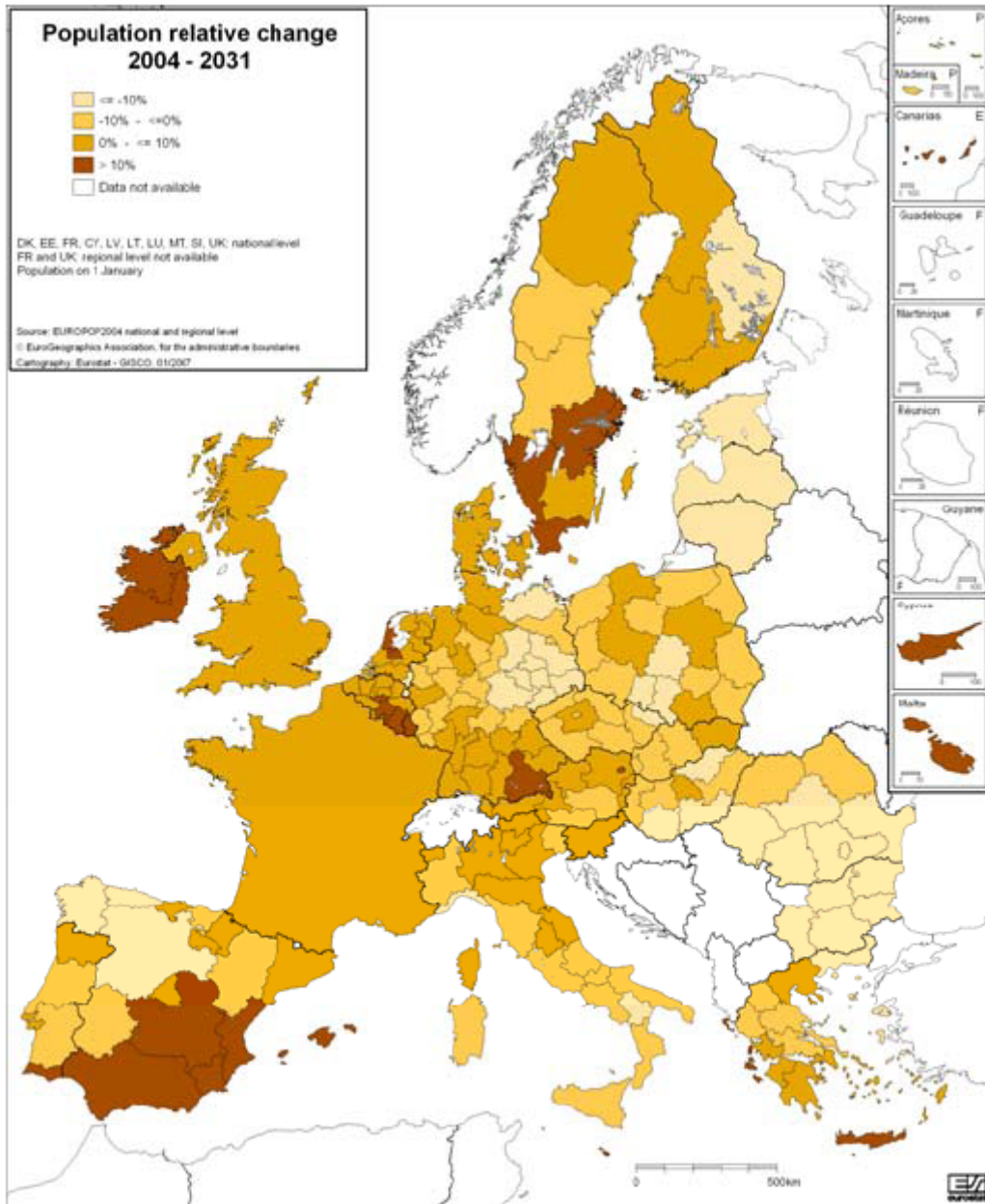
Table 1.3: Demographic balance 1.1.2004 – 1.1.2051, “baseline” variant of the Trend scenario (in thousand).

	Observed population 1.1.2004	Baseline					Population 1.1.2051	
		Cumulated births	Cumulated deaths	Natural change	Net migration	Total change		
EU-25	456 815	199 694	248 045	-48 351	39 710	-8 641	448 174	EU-25
EU-15	382 674	170 300	207 086	-36 786	37 123	338	383 012	EU-15
Belgium	10 396	5 022	5 427	-405	897	492	10 888	BE
Czech Republic	10 211	3 774	5 784	-2 010	647	-1 363	8 848	CZ
Denmark	5 398	2 735	3 037	-302	323	22	5 419	DK
Germany	82 532	29 880	47 191	-17 311	8 980	-8 330	74 201	DE
Estonia	1 351	561	809	-248	19	-229	1 121	EE
Greece	11 041	4 352	6 559	-2 207	1 743	-464	10 578	EL
Spain	42 345	16 856	22 863	-6 007	6 235	228	42 573	ES
France	59 901	32 972	30 053	2 919	2 823	5 741	65 642	FR
Ireland	4 028	2 718	1 903	814	645	1 459	5 487	IE
Italy	57 888	20 402	31 680	-11 278	5 777	-5 501	52 387	IT
Cyprus	730	401	392	8	238	247	977	CY
Latvia	2 319	933	1 418	-484	30	-454	1 865	LV
Lithuania	3 446	1 350	1 957	-606	28	-578	2 868	LT
Luxembourg	452	296	233	63	132	194	646	LU
Hungary	10 117	4 063	6 092	-2 029	795	-1 233	8 883	HU
Malta	400	219	223	-4	113	110	510	MT
Netherlands	16 258	8 622	8 980	-358	1 480	1 121	17 379	NL
Austria	8 114	3 300	4 212	-912	985	73	8 187	AT
Poland	38 191	15 209	20 231	-5 022	318	-4 704	33 487	PL
Portugal	10 475	4 505	5 832	-1 326	808	-518	9 957	PT
Slovenia	1 996	771	1 162	-390	287	-103	1 893	SI
Slovakia	5 380	2 111	2 892	-781	109	-671	4 709	SK
Finland	5 220	2 573	2 875	-303	288	-15	5 205	FI
Sweden	8 976	5 022	4 851	171	1 069	1 240	10 216	SE
United Kingdom	59 652	31 047	31 390	-343	4 939	4 596	64 247	UK
Bulgaria	7 801	2 229	4 740	-2 512	-252	-2 764	5 038	BG
Romania	21 711	7 947	12 194	-4 247	-475	-4 722	16 989	RO

Source: Eurostat, EUROPOP2004

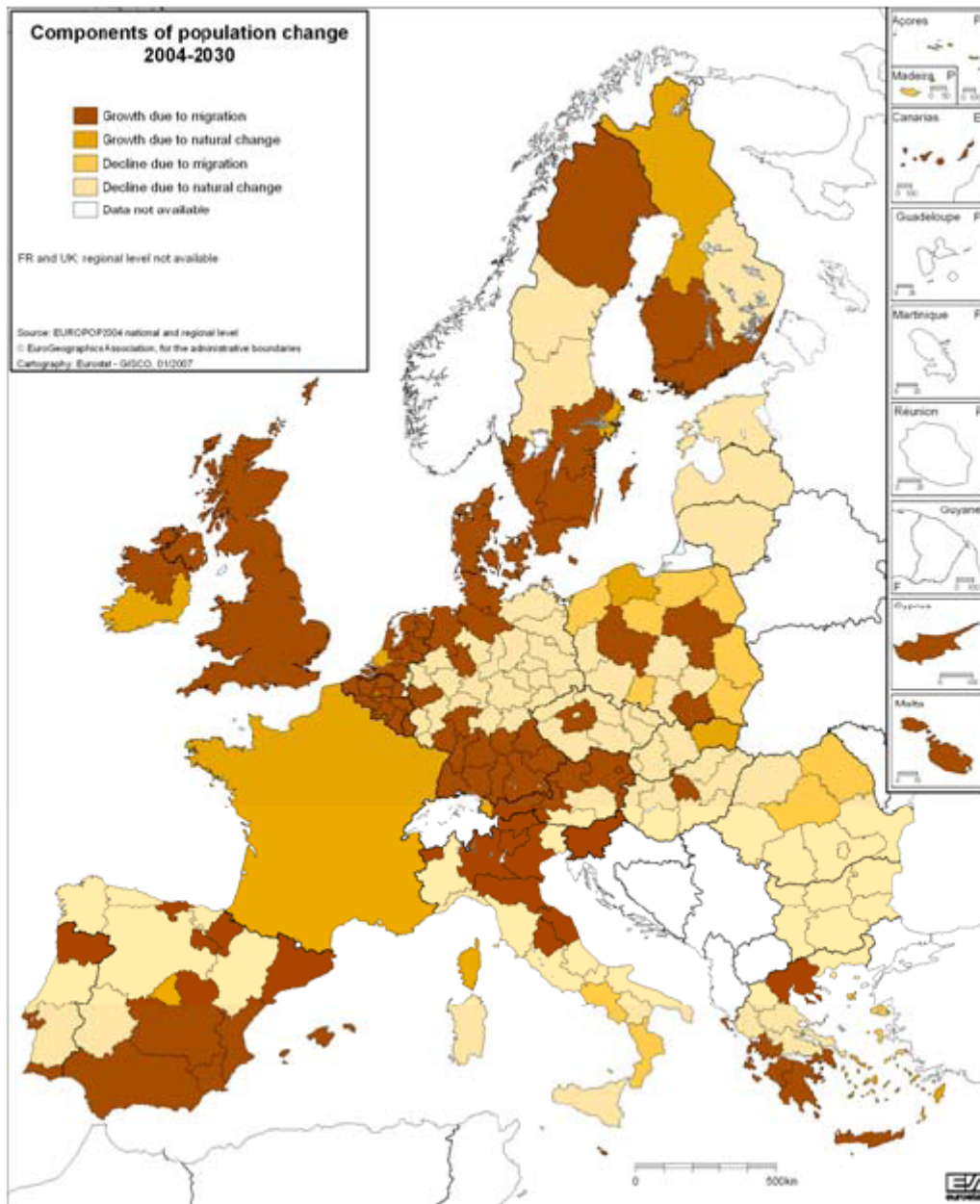
The demographic diversity, which is evident at the national level, further increases when a regional (sub national) focus is introduced (van Nimwegen 2008). According to Eurostat Population Projections to 2030, not all regions are likely to decline, but around 50% of all regions will experience a population reduction by 2030 (Lanzieri 2007) (Figure 1.2). In another 16% of the regions, a declining population trend will have started although migration will be the main driver of regional population growth (Figure 1.2). With the exclusion of a few cases, a pattern of population change can be identified across the European Union. The regions belonging to the Western and Northern countries are projected, with a few exceptions (mainly in the east of Germany), to show an increase in population between 2004 and 2031. The Southern European countries will have a dual nature, comprising both regions with strong growth (e.g. the south of Spain and Greece) and declining regions (like the south of Italy or the regions in the north-west of Spain). Poland and the Central European countries will have a majority of their regions experiencing population declines. Projections further show that the Baltic countries, together with the Central-Eastern regions, are likely to experience a population decline of more than 10% (Lanzieri 2007) (Figure 1.2 and 1.3).

Figure 1.2: Population relative change 2004-2031. Baseline variant. Regional projection



Source: Eurostat, EUROPOP2004

Figure 1.3: Components of population relative change 2004-2031. Baseline variant. Regional projection



Source: Eurostat, EUROPOP2004

With regard to population distribution, we can briefly summarise that the Nordic countries and cities in Southern Europe show urban growth, whilst the central and eastern European conurbations generally show a loss of population (European Commission, Directorate-General for Regional Policy 2007). Western European countries have cities that are both growing and shrinking. The faster a city grows the less the share of population of that city is comprised of elderly people. This might be a hypothesis to be tested in subsequent case studies. Migration is particularly important for larger cities as they attract migrants from greater distances than

smaller towns. Above all, the trend towards one-person households is pervasive across all European cities – either for young migrant workers or single elderly people.

All of these trends present significant demographic challenges for cities and regions (European Commission 2007).

1.1.3 Important role of international migration in population growth and composition

Development and composition of the population growth in Europe has varied significantly over the years. International migration has gained importance in becoming the major force of population growth since the early 1990s onwards (European Commission, Directorate-General for Regional Policy 2007). In recent years, clearly more than three quarters of the total population increase was due to a net inward migration (Table 1.1). A relevant exception is with a few eastern European countries, where net migration is negative (e.g. Poland, Slovakia, Latvia and Lithuania) (Table 1.1).

At the regional level, migration will play a major role as a driver of population growth: for 85 of the 96 regions projected to have population growth, migration (international and/or interregional) will be either the only or the strongest growth factor (Lanzieri 2007) (Figure 1.3). Growth due to migration is projected to be mostly in the south of Spain, Portugal, Greece, Germany, Finland and Sweden, in the north of Italy and Ireland, and in the Benelux countries. In another 51 regions, migration will not reach levels high enough to offset the decline due to natural change (Lanzieri 2007). The decline due to natural change will affect the eastern parts of the European Union, with a few exceptions mostly located in Poland, the north of Spain and Greece and the south of Italy. Several countries do have regions with different population development (Lanzieri 2007) (Figure 1.2 and 1.3).

Migration is influenced by a combination of economic, political and social factors which act as “push” factors in the migrant’s country of origin and “pull” factors in the destination country. The economic prosperity and political stability of the EU exert a considerable pull effect. However migration flows increased not only from outside Europe, but also between the European Union, having a different impact on European Country of origin and destination.

The stock of non-EU-25 nationals living in the 25 Member States in 2005 was around 19 million, the equivalent of 4.1% of the total population. The proportion of other EU nationals living in a different European Union Country is 1.6% of the total population on average, with more than 7.3 millions individuals (Eurostat 2007). Apart from Latvia and Estonia, where the large percentage of non-EU-25 nationals included former USSR citizens, who have not taken the citizenship of the host country (called non-citizens or people with undetermined citizenship), relatively few inhabitants with foreign citizenship are found in the new East-European member states (less than 3%). For example, in Hungary, Poland and Slovak Republic, the percentage of non-EU-25 nationals is under 1.5% (Eurostat 2006). On the contrary, most of the older member states have above average shares of foreign citizens (up to 9%).

Luxembourg, as a centre of EU-institutions, is a unique case with non-nationals accounting for 39% of the population, which is predominately composed of citizens of the old EU-15 (Eurostat 2006). In Austria and Germany, foreign citizens account for 9% of the total population, of which a considerable proportion come from non-EU-25 countries. These figures include Turkish nationals, who in Germany constitute 2.1% of the total population and in Austria 1.6%. Belgium also has a comparatively high percentage of foreigners, but they are primarily from the EU-15 countries, especially from Southern Europe (Eurostat 2006).

France shows a comparatively modest percentage of foreigners (5.6% non nationals, of which 3.5% are non-EU-25 nationals) which can be explained by a rather strong naturalisation policy. The same holds for the Netherlands. Both the UK and the Netherlands have a significant immigration from former colonies. These migrants generally held citizenship of the receiving country already before immigration and consequently do not appear in the data (Eurostat 2006). Sweden and Denmark have about 3% of foreign population, while Finland lags behind with 2%.

The South-European countries traditionally counted few foreign nationals, but for a number of years, migrants from the African continent, from Southern America and from Eastern Europe have moved there. As a result, the share of foreigners in these countries has steeply increased, notably in Spain and Greece, which are already above the EU-average in this respect (around 8%).

If one focuses in greater detail on the country of origin of the ten largest foreign-citizen populations in each member state for which data are available, one discovers that citizens from neighbouring countries tend to be among the top ten (Schoorl and van Praag 2007). For instance, in Belgium, the French and the Dutch are the second and third largest groups, while in the Slovak Republic, Ukrainians, Czechs, Poles and Hungarians are the largest groups. Former colonial ties show up in many countries, such as in France (Moroccans, Algerians – even though most possess French citizenship) and Portugal or Spain (citizens from Africa and Latin America). The data also clearly reflects political connections dating back to the cold war, e.g. Vietnamese in the Czech and Slovak Republics and in Hungary and Poland; Syrians in Bulgaria and Romania (Schoorl and van Praag 2007). More generally, the strong linkages between former Eastern European states and states which have split up in the recent and not so recent past are evident. Furthermore, the history of labour migration is strongly visible in western European countries (as witnessed by for instance Turks in Germany and the Netherlands and Portuguese in Luxembourg), as is the more recent migration of refugees and asylum seekers, as can be illustrated by the presence of Iraqi citizens in the Scandinavian countries.

Population diversity can prompt integration problems as the public perception of migration is increasingly negative in the EU (European Commission, Bureau of European Policy Advisers 2006). Moreover, immigrant women and children are particularly at risk of social exclusion. The integration of foreign women in the EU is particularly poor, especially because of an under-representation in the labour force, strong discrimination, a concentration in low skilled and irregular jobs, and a lack of direct access to welfare and social protection (European Commission, Bureau of European Policy Advisers 2006). The EU has set out to develop a

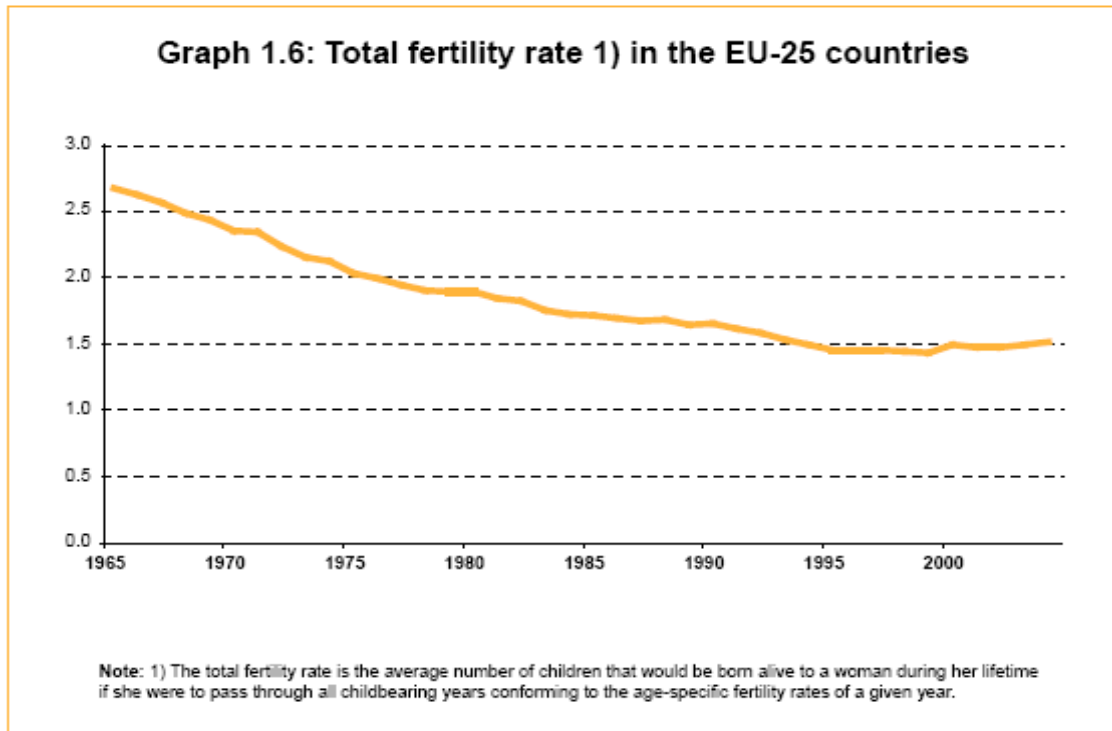
common immigration policy to assure policy coherence, considering that legal immigration must be complemented by positive measures, immigrant selection and special attention to the demand side. It should be recalled however that the issues mentioned above are quite new in the EU policies and they were not explicitly in agenda in 1999-2000, when regional/national Objective 1 or Objective 2 Programmes (2000-2006) were proposed.

1.1.4 Low, lowest low and late fertility: the Europe of the few children

A major reason for the slowdown of the “natural increase” of the population is the fact that, on average and over time, the inhabitants of the European Union have fewer children. The total fertility rate (TFR) is the average number of children that would be born alive to a woman during her lifetime if she were to pass through all childbearing years conforming to the age-specific fertility rates of a given year. All EU Member States have now TFR levels below 2.1, the level needed for the replacement of generations. European Union fertility has been below the so-called replacement level since the mid-1970s, triggering population ageing and imminent population decline (European Commission 2007).

In the 25 countries that till 2007 have formed the European Union, the total fertility rate has declined from a level of above 2.5 in the 1960s to a level of about 1.5 in 1995 where it has remained since (Figure 1.4). France is the Member State showing the highest fertility rate in 2005 (1.94 children per woman), together with Ireland (1.86), Finland and Denmark (1.8), while Poland, Slovenia, Slovakia and the Czech Republic show the lowest rates, less than 1.3 children per woman (Eurostat database 2008) (Table 1.4). It should be remarked that all of the latter countries seem to have reached a sort of “bottom line” in the last few years and are now experiencing slight increases again (European Commission 2006).

Figure 1.4: Total Fertility rate in EU-25 Countries. Trend 1965-2005



Source: Statistics in pocket 2007

Table 1.4: Total Fertility rate in EU-25 Countries

	1960/1969 ²⁾	1970/1979 ²⁾	1980/1989 ²⁾	1990/1999 ²⁾	2000/2004 ²⁾
EU-25	2.59	2.08	1.73	1.50	1.48
Euro area	:	:	:	:	:
BE	2.53	1.89	1.58	1.61	1.63
CZ	2.09	2.24	1.97	1.45	1.17
DK	2.46	1.84	1.48	1.74	1.75
DE	2.43	1.63	1.45	1.33	1.36
EE	:	2.08	1.95	1.47	1.36
EL	2.36	2.32	1.78	1.33	1.27
ES	2.92	2.75	1.73	1.24	1.27
FR	2.75	2.11	1.84	1.73	1.89
IE	3.91	3.56	2.60	1.95	1.96
IT	2.53	2.18	1.45	1.24	1.28
CY	:	2.31	2.17	2.17	1.53
LV	:	1.95	2.08	1.43	1.24
LT	2.49	2.18	2.06	1.67	1.29
LU	2.29	1.63	1.46	1.68	1.68
HU	1.92	2.08	1.83	1.59	1.30
MT	2.70	2.20	2.00	1.77	1.54
NL	3.01	1.88	1.53	1.59	1.73
AT	2.69	1.88	1.53	1.44	1.38
PL	2.54	2.25	2.26	1.72	1.27
PT	3.11	2.56	1.84	1.49	1.47
SI	2.23	2.16	1.77	1.31	1.22
SK	2.74	2.50	2.23	1.68	1.22
FI	2.47	1.65	1.67	1.78	1.75
SE	2.26	1.79	1.76	1.81	1.64
UK	2.78	1.98	1.80	1.75	1.67
BG	2.19	2.18	1.78	1.37	1.25
HR	2.10	1.92	1.83	1.55	1.34
MK	:	:	:	:	:
RO	2.48	2.61	2.03	1.43	1.28
TR	:	:	:	:	:
IS	3.65	2.67	2.18	2.13	2.00
LI	:	:	:	:	1.47
NO	2.88	2.08	1.73	1.87	1.80
CH	2.49	1.72	1.54	1.52	1.43

Source: Statistics in pocket 2007

Within the EU-25, we can distinguish approximately two groups of countries: those with a moderately low fertility (in the range of 1.6-1.9 births per woman) and those with very low fertility (in the range of 1.5 births or less). While the difference may appear small at first glance, they have major implications for a country's long-term demographic future (McDonald 2000). The first group of countries (with moderately low fertility rates) can still expect to offset their natural population decline with a reasonable level of immigration (European Commission 2007). This is the case of France, Ireland, Finland, Denmark, but also of United Kingdom (1.78), Sweden (1.77), and the Netherlands (1.71). By contrast, Mediterranean, Eastern European Members and Germany, which belong to the group of lower fertility, are less likely to offset their natural population decline.

On average, European Union fertility can be labelled as "low", while fertility levels in the new Member States, as well as in Mediterranean Countries are around the so-called "lowest low" benchmark (1.3 children per woman), as many scholars convey (Kohler et al. 2002). The sustained level of low fertility gives rise to concern: for instance, if lowest low TFR persist over a long time in a contemporary low-mortality context, TFR levels at or below 1.3 imply a reduction of the annual number of births by 50% and a halving of the population size in less than 45 years (Kohler et al. 2002). The authors observe that in part this is a consequence of tempo distortions reducing the total fertility rate below the associated level of cohort fertility (see the following paragraphs), but in part also a consequence of deep socio-economic changes. Increased returns to human capital and high economic uncertainty in early adulthood have made late childbearing a rational response for individuals and couples. Moreover, social interaction effects reinforce this behavioural adjustment and contribute to large and persistent postponement in the mean age at birth. Finally, institutional settings favour an overall low level of fertility (Kohler et al. 2002).

A very slow but seemingly persistent increase in the European fertility level can be observed from around the turn of the century. As compared to 2004, the period indicator of fertility slightly increased in a majority of 17 Member States, while this indicator slightly decreased in some 4 Member States (European Commission 2006, van Nimwegen 2008) (Table 1.4). It is interesting to note that also lowest-low-fertility countries are recently experiencing a (albeit modest) rise in fertility. The largest fertility declines in the 2004-2005 period took place in Ireland (-6%) and Cyprus (-5%), which are relatively high fertility countries, while the strongest fertility increases occurred in Latvia (+6%), the Czech Republic (+4%) and Hungary (+3%), typically lowest low fertility countries (van Nimwegen 2008).

As anticipated, another peculiar characteristic of reproductive behaviour in Europe is motherhood postponement. This is considered one of the most common features of fertility change in Europe, so that some authors refer to it as a distinctive "postponement transition towards a late-childbearing regime" (Kohler et al. 2002). Higher educational attainment of successive generations of women, their growing aspirations to be economically active and financially independent, the difficulties of combining parenthood and paid employment, and

the need for parents to secure financial security before having children are among the major causes of parenthood postponement (Nicoletti and Tanturri 2008).

In the last decades, the general and progressive delay of the first childbirth has been observed virtually in every European Union country. In 2005, the mean age of mothers with a first child ranges between 24.84 (in Romania) and 29.84 (in the UK) years of age (Eurostat database). The percentage of births to mothers aged thirty or over, exceeds 40% in various countries, including Sweden, Denmark, Finland, Netherlands, Italy and Spain (Pinnelli and De Rose 2001). As supported by micro level analysis (Billari and Kohler 2002), the delay of the birth of the first child is a relevant cause for the reduction of completed fertility. Undeniably, the compression of the reproductive span may affect the possibility for women to fulfil their desired level of fertility, due to probable sub-fecundity or even sterility impediments (Beets 2006).

Caution should be paid in the interpretation of the period indicator of fertility (TFR) as it is sensitive to changes in the timing of childbirth (van Nimwegen 2008). Indeed, effects of changes in current fertility patterns on future fertility probabilities are not taken into account in the computation of period indicator. Thus, when more and more women are postponing births, the TFR will inevitably go down initially (the so called “tempo effect”), even though the likelihood of having children at a later age would go up if these women still wished to have the same number of children (the so called “quantum effect”) (European Commission 2007). Once the general process of postponement in a country has stopped, the TFR will rise again (van Nimwegen 2008). Correct indicators should be cohort completed fertility indicators, but it is not possible to get them for the younger generations, still being in reproductive age.

The impact of postponement on fertility rates is estimated by some authors to be quite important (Kohler et al. 2002, van Nimwegen 2008). With substantial variation across Europe, later childbearing coincides with higher shares of either temporary or permanent childlessness (Beets 2006). On average, currently half of the EU-15 women are still childless when they turn 28 years of age. Ultimate childlessness is still fairly low in the new Member States (around 13% for birth cohort 1965), more elevated in EU-15 (around 16%) and as high as 20% in Austria, England & Wales, Finland, Germany, Ireland, Italy, and just under 20% in the Netherlands (Sobotka, 2004). Fertility levels could, on average, increase by some 10% if foregone births would be recuperated (van Nimwegen 2008). This outcome suggests a window of opportunities for so-called “tempo policies”, aiming to influence the timing of fertility (e.g. lowering the age at completion of education or anticipating the entry into the labour market for young people) (Lutz and Skirbekk 2005, van Nimwegen 2008). Moreover, in most EU countries the postponement of childbearing does appear to result in reduced average fertility for the cohort as a whole. The share of only one-child families appears to be increasing, and childlessness among women in their 30s and 40s is becoming more frequent as well (van Nimwegen 2008).

The latest available average cohort fertility rates for the generations of women born between 1955 and 1965 in the EU-25 are 1.94 and 1.77, respectively, confirming that cohort fertility has now dropped below the replacement level (European Commission 2007). In the EU, the fertility rates of women aged below 30 years have declined since the 1970s, while the fertility rates of

women over 30 have risen since the 1980s, which is a clear indication of postponement. Since 1980 the average TFR has declined by 0.4 children per woman. During the same period the mean age at childbearing has risen by 2 years to 29 years. In recent years, the decline in fertility rates at young ages appears to have slowed down in many Member States and even stopped in several countries. As a consequence, the decline in the total fertility rate (TFR) has also slowed down or even turned into a slight increase. In some countries, the rise in fertility at older ages has slowed down, suggesting that in these countries the “catching-up phase” is near its end. But in most countries a strong increase in fertility at ages 30 or more is still occurring, suggesting that the TFR in these countries may increase in the coming years (OECD 2005). Fertility is therefore likely to increase in Member States where it is below average because of the tempo effect, particularly in the new Member States (European Commission 2007).

However, some scholars are more pessimistic about the possibility of increasing fertility rates as witnessed by Lutz, Skirbekk and Testa (2005) who foresee in some cases the risk of a sort of “low fertility trap” resulting from a self-reinforcing mechanism. Their low fertility trap hypothesis has three components: a demographic one based on the negative population momentum (i.e. the fact that fewer potential mothers in the future will result in fewer births); a sociological one, where the ideal family size for the younger cohorts is declining as a consequence of the lower actual fertility observed among previous cohorts; and an economic one, where the aspirations of young people are increasing while their expected income may be declining as a consequence of the rising cost of population ageing.

The literature on determinants of low fertility is abundant. Traditionally it offers basically two types of explanation for the decline in fertility: one is based on economic theory and rational choice, the other based on cultural and value change. However the necessity of an integrated explanation has been claimed for a more complete comprehension of a complex phenomenon like low fertility. There is quite widespread agreement in the literature that European lowest-low-fertility countries share an institutional setting that implicitly favours a relatively low level of fertility (Kohler et al. 2006). Scarcity of family friendly policies and inflexible labour market seem to make particularly difficult the combination of female labour force participation and childbearing in many European regions. For instance, in Mediterranean countries, the possibilities for part-time work or re-entering the labour force after an absence due to child-birth are limited (Del Boca 2002; González et al. 2000; Stier et al. 2001). In comparison with other Western European countries, Italy and Spain also have among the lowest levels of state support for families with children in terms of tax allowances or direct transfers (Esping-Andersen 1999). While this deficit is partially compensated through strong family networks, as for instance through the provision of child-care or economic resources by grandparents (Reher 1997), this substitution of family support for public support is likely to be insufficient in contemporary industrialised countries (Kohler et al. 2006). Again, the lowest-low fertility countries in Southern Europe, but also in Germany and Austria, provide highly insufficient child-care support (OECD 2007). In 2004, for instance, the share of children below the age of 3 in formal care in Southern Europe and German speaking countries was low (e.g. around 6% in Italy and Greece), compared to Continental Europe (around 30% in France, and the Netherlands) and

very low compared to the Nordic countries (more than 30%). Moreover, “familism” and a difficult entry into the labour market may discourage union formation and fertility (Dalla Zuanna 2001). Family roles in the Southern European lowest-low fertility countries are still shaped in a very traditional way, without adapting to the new role of women (Chesnais 1996, McDonald 2000). Italy and Spain have highly asymmetric labour divisions of domestic tasks while the birth of the first child seems to increase gender disparities even more (Mencarini and Tanturri 2004, Mills et al. 2008). Moreover, evidence shows that those couples whose fathers are more active in caring activities are more likely to have one more child (Mencarini and Tanturri 2004, Mills et al. 2008). The countries therefore conform to McDonald’s (2000) argument about gender equity: fertility falls to very low levels when gender equity rises in individual-oriented institutions, like the labour market, while fertility remains low in family-oriented institutions.

Very low fertility in Eastern Europe is in part determined by similar institutional factors hindering high parity progression probabilities (Kohler et al 2006). In addition, many of the pro-natalist—or at least family friendly—policies in CEE countries have discontinued after 1990 (Macura 2000), and the economic crisis has particularly deteriorated the high integration of women in the labour market. Furthermore, Eastern Europe is characterised by a persistence of economic insecurity throughout the life-course. In Eastern Europe, the uncertain long-term outlook regarding unemployment, the housing situation and economic recovery implies that uncertainty affects not only the timing of the first birth but also the transition to the second child and higher-parity children (Kohler et al. 2006).

In spite of very low fertility, the two-child family still remains to be the most common aspiration of Europeans. The mean ideal number of children (both general and for their own family) is two or slightly higher, for both men and women as well as for each age group (Testa 2006). Austria and Romania are the only European countries with ideals below the replacement level among young female and male cohorts (Testa 2006). But ideals seem to be different from real situations: when one adds up the number of children already born and the number of children people still intend to have, for women in the prime reproductive ages, several countries (Austria, Romania, Spain, Italy, Slovakia, Germany, Malta, and the Czech Republic) have averages of less than two, even if it is still higher than the current average fertility rates (Testa 2006, European Commission 2006).

Therefore, it seems plausible that European couples - and women especially - encounter some obstacles to parenthood, if survey evidence (e.g. Special Euro barometer on fertility and ageing 2006) suggests that they generally would like to have more children than they actually have (Testa 2006). Is it possible to remove these constraints? The debate on the efficacy of family-friendly policies or gender policies to increase fertility is still open (Neyer 2003, McDonald 2000, and OECD 2005). International comparisons show that policies supportive of those who wish to have children can have some effect in raising birth rates (European Commission 2006), at least if still there is a gap between women’s childbearing desires and realisations (Testa 2006). It is necessary to stress that even small changes in fertility rates will have a strong impact on the population size and age structure in the long run. However, an increase in fertility rates will

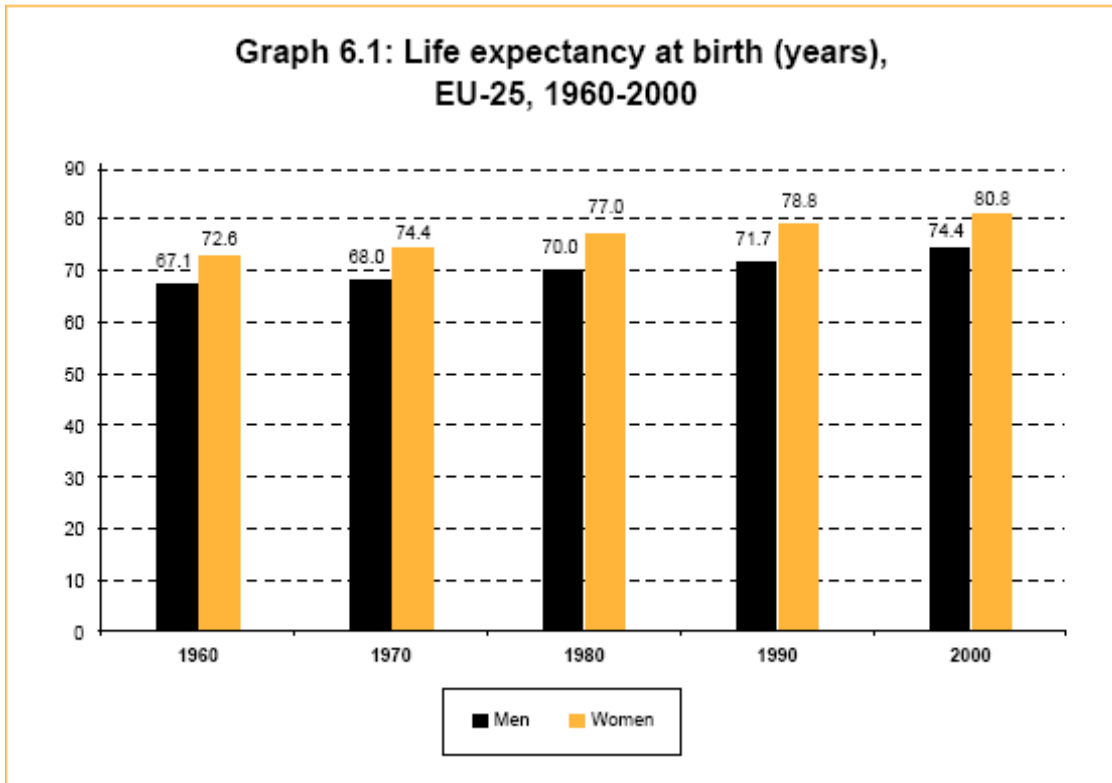
only translate into a larger working age population after 20 or more years (European Commission 2007). Moreover, with rising life expectancy, a constant old-age dependency ratio could only be achieved by fertility rates well above the replacement level, which would mean continuous population growth (European Commission 2007).

Many authors agree that there is nothing inevitable in the abnormally low fertility rates (at or below 1.3 children per women of childbearing age) that currently characterise several European Union members (OECD 2005). Other members with very different characteristics such as France and several Nordic countries have fertility rates that are close to those needed to assure the stability of their population. These "successes" reflect, at least in part, "the existence of policies and arrangements that have contributed to lowering the costs of children borne by families: direct transfers and tax advantages, but also—and more importantly—investments in education and childcare facilities, access to a variety of caring arrangements, affordable housing, leave provisions and features of their labour market that do not penalise women for their decision to have children and that facilitate the sharing of family chores and reconciling work and family life for young couples. The same range of policies holds the promise of being effective elsewhere" (OECD 2005).

1.1.5 A longer life for the Europeans

Europe has seen much economic and social progress over the last 50 years and Europeans are living longer than ever before, on average eight to nine years more than in 1960 (Figure 1.5). On average, life expectancy at birth has increased due to better circumstances of life and medical progress. During the last fifty years mortality has shifted towards older ages. Degenerative and man-made diseases have become the main causes of death. Mortality at older ages has declined, mainly due to decreasing mortality rates from cardiovascular diseases (Meslé and Vallin 2002).

Figure 1.5: Life expectancy in EU-25 Countries. Trend 1965-2005



Source: *Statistics in pocket 2007*

In the countries of EU-25 between 2000-2006, a newborn girl can expect to live over 81 years, while a boy about 75 (Table 1.5 and Table 1.6). At the beginning of the 1960s, life expectancy at birth stood at below 73 years for girls and at about 67 years for boys (Eurostat 2007). Since 1980, the average annual increase in life expectancy at birth in the EU25 countries has been slightly under 0.2 years (De Beer 2006). Nevertheless, there are still big differences in life expectancy among the EU25 countries. Life expectancy at birth of boys ranges from 66 years in the Baltic countries to 78 years in Sweden, and life expectancy at birth of girls ranges from 76 years in Latvia to almost 84 years in Spain and France (Table 1.5 and Table 1.6).

Table 1.5: Life expectancy in EU-25 Countries. Male. 1960-2050

	1960/64	1970/74	1980/84	1990/94	2000/03	2004*	2050**
EU-25	67.3	68.5	70.3	72.1	74.7	75.6	81.8
EU-15	67.6	68.9	71.0	73.2	75.8	76.7	82.3
NMS-10	65.6	66.4	66.4	66.2	69.4	70.4	78.7
BE	67.7	67.8	70.0	73.0	75.1	75.9	82.3
CZ	67.5	66.6	67.1	68.6	72.0	72.6	79.7
DK	70.4	70.7	71.2	72.5	74.7	75.2	80.9
DE	66.9	67.3	69.6	72.5	75.4	75.7	82.0
EE	64.3	65.8	64.4	63.3	65.3	66.0	74.9
EL	67.3	70.1	72.2	74.8	75.4	76.6	80.3
ES	67.4	69.2	72.5	73.7	76.1	77.2	81.4
FR	66.9	68.4	70.2	73.2	75.6	76.7	82.7
IE	68.1	68.8	70.1	72.5	74.8	75.8	82.4
IT	67.2	69.0	70.6	74.0	76.8	76.8	83.6
CY	.	70.0	72.3	74.4	76.1	77.0	81.9
LV	66.1	65.4	64.0	62.1	65.0	65.5	74.3
LT	66.6	66.9	65.7	64.5	66.4	66.4	75.5
LU	66.5	67.1	69.1	72.3	75.0	75.0	81.6
HU	66.4	66.5	65.4	64.8	68.1	68.6	78.1
MT	67.1	68.5	69.7	74.0	76.1	76.7	81.8
NL	71.5	70.7	72.7	74.1	75.9	76.4	80.2
AT	66.2	66.5	69.4	72.6	75.6	76.4	83.6
PL	65.1	67.0	67.0	66.9	70.2	70.2	79.1
PT	61.2	64.2	67.7	70.8	73.6	74.2	80.4
SI	65.6	65.9	67.2	69.6	72.4	72.6	79.8
SK	68.4	66.8	66.8	67.5	69.7	70.3	77.7
FI	65.5	66.5	69.2	70.8	74.7	75.3	81.9
SE	71.5	72.1	73.0	75.3	77.7	78.4	83.3
UK	67.9	68.7	70.2	73.4	75.9	76.2	82.9
BG	68.5	69.3	68.9	68.1	68.6	68.9	78.2
RO	65.1	66.5	66.8	66.2	67.6	67.7	77.6
HR	64.3	65.7	66.6	68.6	71.0	72.0	77.8***
TR	50.3***	55.0***	59.0***	64.0***	66.4	68.8	75.2***

Source: Eurostat.

Table 1.6: Life expectancy in EU-25 Countries. Female. 1960-2050

	1960/64*	1970/74	1980/84	1990/94	2000/03	2004**	2050***
EU-25	73.0	75.0	77.2	79.1	81.0	81.8	86.9
EU-15	73.2	75.3	77.7	79.8	81.6	82.4	87.4
NMS-10	71.6	73.4	74.7	75.3	78.1	78.7	84.1
BE	73.5	74.2	76.8	79.8	81.2	81.7	88.3
CZ	73.4	73.5	74.3	76.0	78.5	79.0	84.1
DK	74.4	75.9	77.3	77.9	79.4	79.9	83.7
DE	72.4	73.6	76.1	79.0	81.2	81.4	86.8
EE	71.6	74.6	74.4	74.4	76.7	76.9	83.1
EL	72.4	73.8	76.8	79.8	80.7	81.4	85.1
ES	72.2	74.8	78.6	80.8	83.2	83.8	87.9
FR	73.6	75.9	78.4	81.3	82.9	83.8	89.1
IE	71.9	73.5	75.6	78.1	79.9	80.7	86.9
IT	72.3	74.9	77.4	80.5	82.4	82.5	88.8
CY	:	72.9	77.0	78.9	81.0	81.4	85.1
LV	73.1	74.7	74.4	73.9	76.2	77.2	82.5
LT	77.1	75.5	75.6	75.6	77.5	77.8	83.7
LU	72.2	73.4	75.9	79.0	80.9	81.0	86.7
HU	70.8	72.3	73.0	73.8	76.4	76.9	83.4
MT	70.7	72.6	73.7	78.4	80.7	80.7	85.0
NL	75.3	76.5	79.3	80.3	80.7	81.1	83.6
AT	72.7	73.4	76.5	79.1	81.5	82.1	87.7
PL	71.0	73.9	75.2	75.9	78.5	79.2	84.4
PT	66.8	70.8	75.2	77.9	80.3	80.5	86.6
SI	72.0	73.4	75.2	77.4	80.1	80.4	85.2
SK	73.0	73.4	74.6	76.0	77.7	77.8	83.4
FI	72.5	75.0	77.6	79.4	81.5	82.3	86.5
SE	75.4	77.5	79.1	80.8	82.2	82.7	86.5
UK	73.7	75.0	76.2	78.9	80.5	80.7	86.6
BG	72.2	73.7	74.3	74.9	75.4	76.0	82.6
RO	69.1	71.0	72.3	73.2	74.8	75.1	82.0
HR	69.0	72.3	74.2	76.0	78.1	79.0	83.3***
TR	54.0****	59.2****	63.2****	68.5****	71.0	71.1	80.1****

Source: Eurostat.

* Period average.

** Preliminary or most recent.

*** According to EUROPOP 2004, Baseline, data for France refer to metropolitan France only.

**** UN data.

Life expectancy is generally higher in the old Member States (82.4 and 76.7 for women and men, respectively) than in the new Member States (78.7 and 70.4 for women and men) (European Commission 2006). The Baltic States report the lowest life expectancies along with very large gender differences (around 77 years for women and 65 for men). Relatively large gender differences are also reported for France and Spain (7-8 years). Overall, gender differences in mortality are nevertheless declining in the EU-25 between 2000-2006, as male mortality rates are falling to the levels observed for women (European Commission 2006).

Even though there has been a considerable rise in life expectancy over a long period of time, there were periods with less favourable developments as well. For example, in many European countries there were unfavourable developments in life expectancy of men in the 1960s (Table 1.5 and Table 1.6). This can be related to the changes in lifestyle after the Second World War, particularly smoking and an unhealthy diet. This led to a strong increase in cancer, ischemic heart diseases and cerebrovascular diseases at relatively young ages, which had a negative effect on life expectancy (Moslé and Vallin 2002). In Central European countries developments

in life expectancy in the 1990s were not very positive after the break up of communist regimes. Both unhealthy behaviour (e.g. alcoholism) and the decay of the medical system contributed to this development.

European countries in which life expectancy around 1960 was high, generally experienced smaller increases in life expectancy than countries with lower life expectancy. In 1960, life expectancy was higher in Northern Western European countries than in Southern European countries. In the latter countries, the rise of life expectancy has been higher since. This however, does not imply that there has been a convergence, as the increase in life expectancy of women in Spain, France and Italy has continued to increase even after the gap was closed (de Beer 2006). Consequently at present in these countries, life expectancy of women is higher than in all other European countries.

In all European countries life expectancy at birth of girls is higher than that of boys (Table 1.5 and Table 1.6). However, the magnitude of the gender gap widely differs among countries. The smallest gender gaps (less than 5 years) are reported for Denmark, Greece, Ireland, the Netherlands, Sweden and the United Kingdom. The largest gender differences in mortality (8 years or over) are observed in Hungary, Latvia, Lithuania and Poland (European Commission 2006).

Moreover, the gender gap has changed over time. Around 1980, the gender difference started to decline in North Western European countries and since the mid 1990s the gender gap has reduced in France and in Southern European countries as well. The decrease in the gender gap is caused both by a slowing down in the increase in life expectancy of women and a stronger increase in life expectancy of men. One explanation of the slowing down in life expectancy of women is that they more or less follow the less healthy life style patterns of men. Another explanation is that women are approaching the limit to further improvements in mortality risks as they already have attained low mortality levels. One explanation of the acceleration for men is the strong decrease in the prevalence of smoking since the 1960s.

Differences in life expectancy across countries give some indication about differences in health status. However, there is no perfect correlation between both, as not all years are spent in good health. Similarly, an increase in life expectancy over time does not necessarily imply that all years gained are spent in good health (de Beer 2006, Robine et al. 2003, Egidi 2003, and Jacobzone et al. 2000). For that reason, healthy life expectancies can be calculated. They estimate the number of life years that are spent in good health (Robine et al. 2003).

As most unhealthy years are spent at older ages, it is useful to look at life expectancy at age 60 rather than at birth. The highest life expectancy at age 60 is observed among French women who at that age may expect to live another 25.7 years, of which they will spend 19.1 years in good health (de Beer 2006). The ranking of EU member countries by healthy life expectancy differs from that of total life expectancy at age 60. For example, the life expectancy of Swedish women aged 60 is one year lower than that of Spanish women, but their healthy life expectancy is slightly higher. This indicates that differences in life expectancy cannot fully be explained by differences in health status (de Beer 2006).

There is general consensus among demographers that life expectancy will continue to rise. There is, however, no agreement how fast and to what level life expectancy will grow. In the latest Eurostat population projections for the 25 Member States, published under the acronym EUROPOP2004 (Lanzieri, 2006), it is assumed that the average annual increase of life expectancy at birth in the first half of the 21st century will equal around 0.15 years for men and 0.10 years for women. This is lower than the average increase during the last four decades. Since 1960, the average annual increase in life expectancy at birth in the EU15 countries has been 0.2 years, whereas for those countries an average annual increase of 0.12 until 2050 is assumed. Thus a slowing down of the increase is assumed (Lanzieri, 2006). This is consistent with the finding that in recent years the pace of increase in life expectancy, particularly for women, seems to have slowed down.

Eurostat assumes that the future increase in life expectancy at birth in the new member states, where current life expectancy is low, will be higher than in the EU15 countries (Lanzieri, 2006). Economic growth and improvement of health care may lead to a relatively strong increase in life expectancy in the new Member States. As a result, differences between countries with the lowest and highest life expectancies will become smaller. Hence a converging trend is assumed.

While the increased lifespan is an important improvement, it also poses many questions for individuals, their families and for social systems. Increased longevity is one of the main drivers of population ageing and the one creating significant implications for the sustainability of pensions and health and care system.

1.1.6 Ageing population and regional policies

Low fertility levels and extended longevity are the causes for ageing of the EU population. When the baby boomers will reach retirement age in the next years, the effect on population structure will be even more dramatic. Therefore, all the experts agree that population ageing is, and will remain, the most dominant demographic challenge to the European Union.

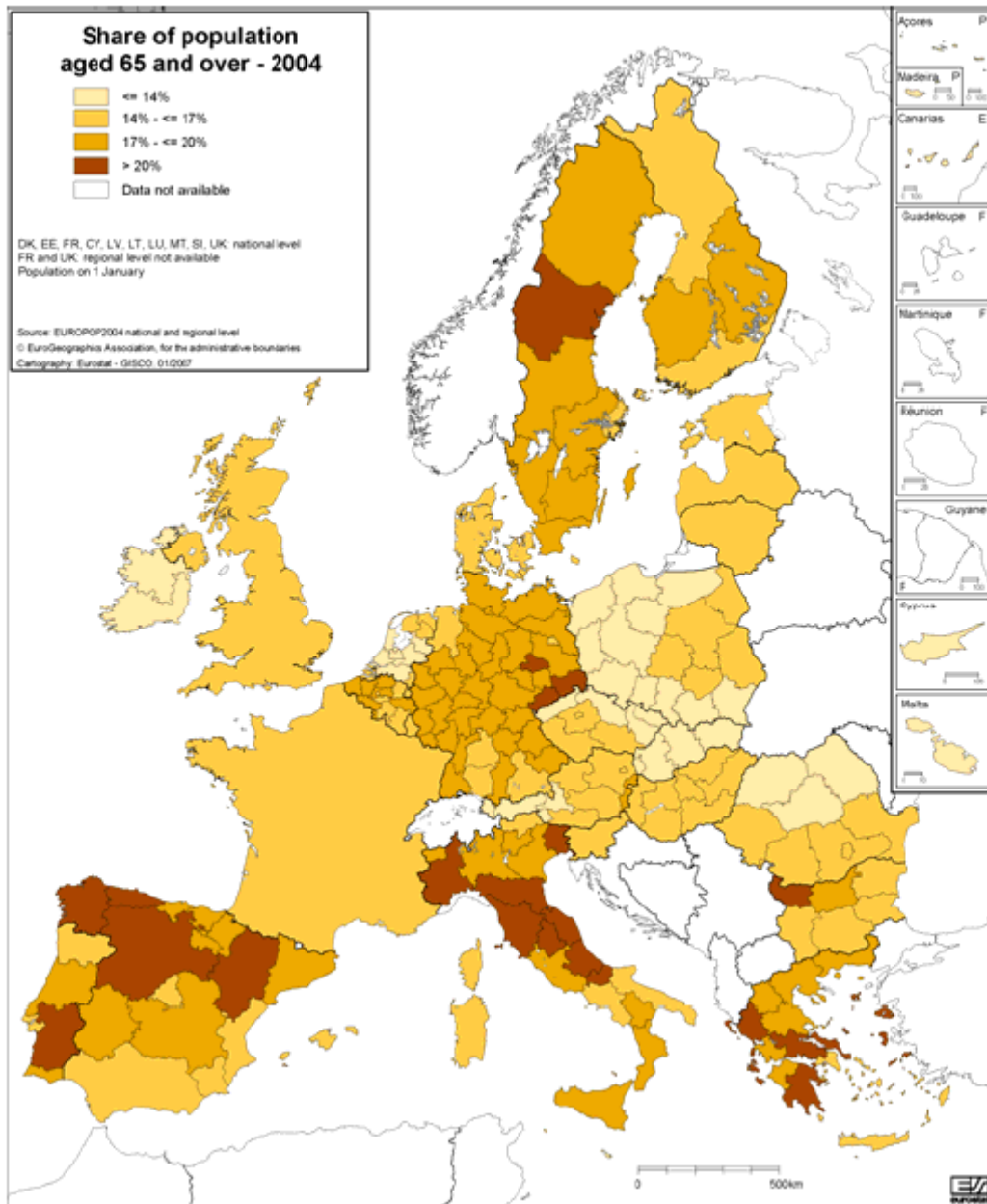
The recent United Nation Ageing Index (taking the share of people aged 60 years or older relative to 100 people 0-14 years of age) ranked Europe first among all world regions, with an index value of 136. In Southern Europe (156) and Western Europe (147) population ageing is more advanced than in Eastern (123) and Northern Europe (124). Of the 10 most aged countries in the world, eight are EU Member States. Japan ranks first, followed by the oldest Member States, Italy and Germany. By the year 2050, Europe would still rank highest on this ageing scale, although the gap with other world regions would be much narrower.

In the EU-25 Countries, the average share of the people 65 years and over is close to 17% in 2005, while the "oldest old" (aged 80 and over) represent 4% of the whole population (Eurostat 2007). Germany and Italy show the highest proportion of older people (around 25%), while Ireland the lowest (15%). The highest proportion of the oldest old are observed again in Italy (5%) and in France (4.5%), while the lowest share in Poland and Slovakia (less than 2.5%)

(Eurostat 2007). The share of older people will increase substantially all over Europe (Lanzieri 2007).

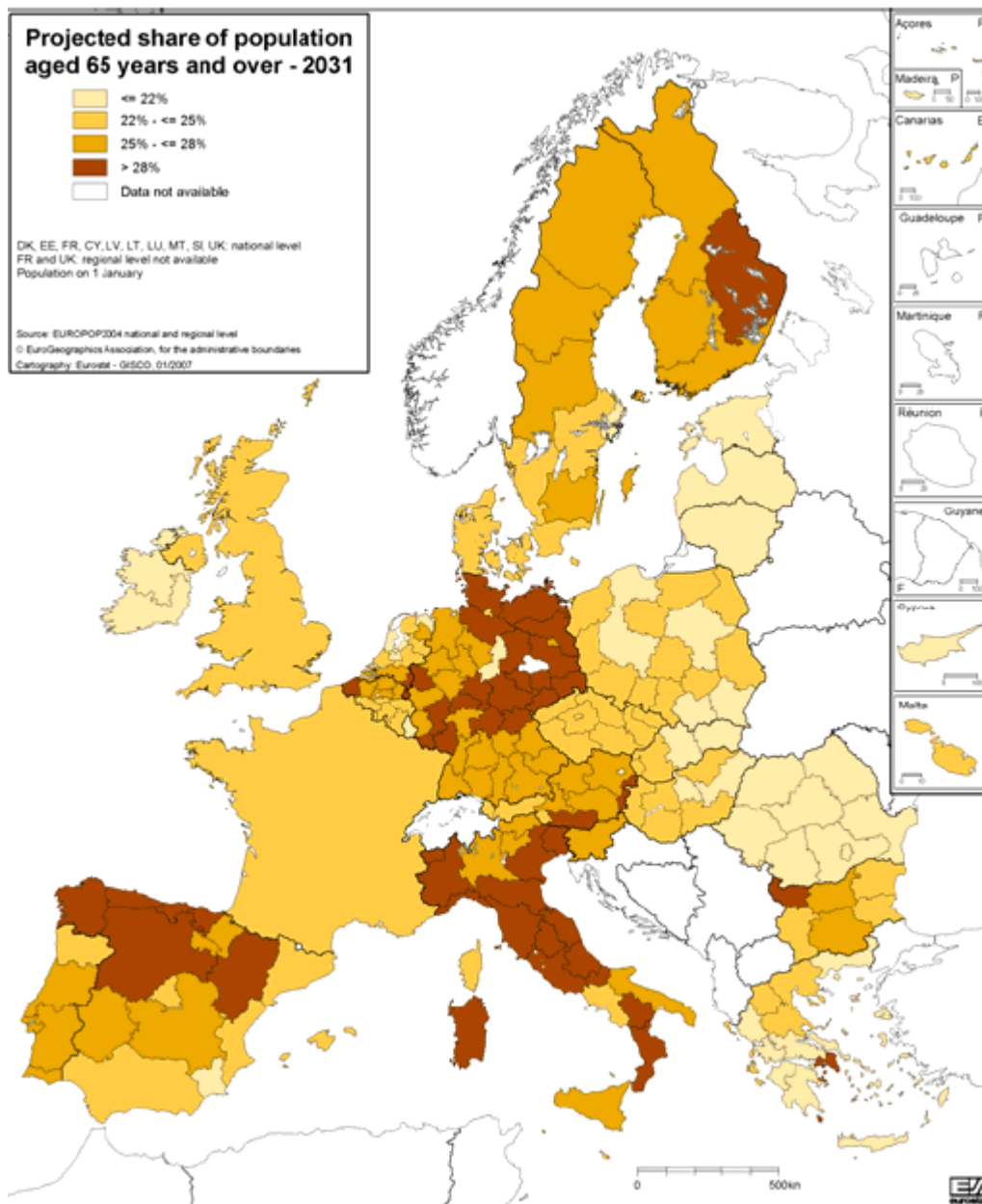
The same trend can be expected at regional level, where the share of the population over the age of 65 will increase virtually in all the regions of the European Union by 2031 (Figure 1.6 and 1.7). On average, the projected increase at NUTS 2 level is more than 8 percentage points. This share will vary in the individual regions of the European Union (Figure 1.8). Even within the same country, the range may be well above 10 percentage points (e.g. in Germany) (Lanzieri 2007). Regions that had an above-average share of population aged 65 years and over in 2004 will mostly continue to be above the average (Lanzieri 2007). The share is projected to increase further in Eastern Germany and in some regions of Italy. Regions in the south of Germany and in Austria will see values moving to above average levels (Figure 1.6 and 1.7). Similarly, the deficit in young generations will continue to affect the east of Germany, the north of Italy and northern Spain. Faster than average decline in the share of young population is projected for several regions of Poland, Slovakia, Romania, Bulgaria and Southern Italy. The decrease in the share of the population aged 0-14 years will lead to a decrease in the share of population of working age (15-64 years old). This suggests that demographic pressure from the younger age group will fall, whereas that due to the elderly will increase further.

Figure 1.6: Shares of population aged 65 years and over in the NUTS 2 regions in 2004 by Member State



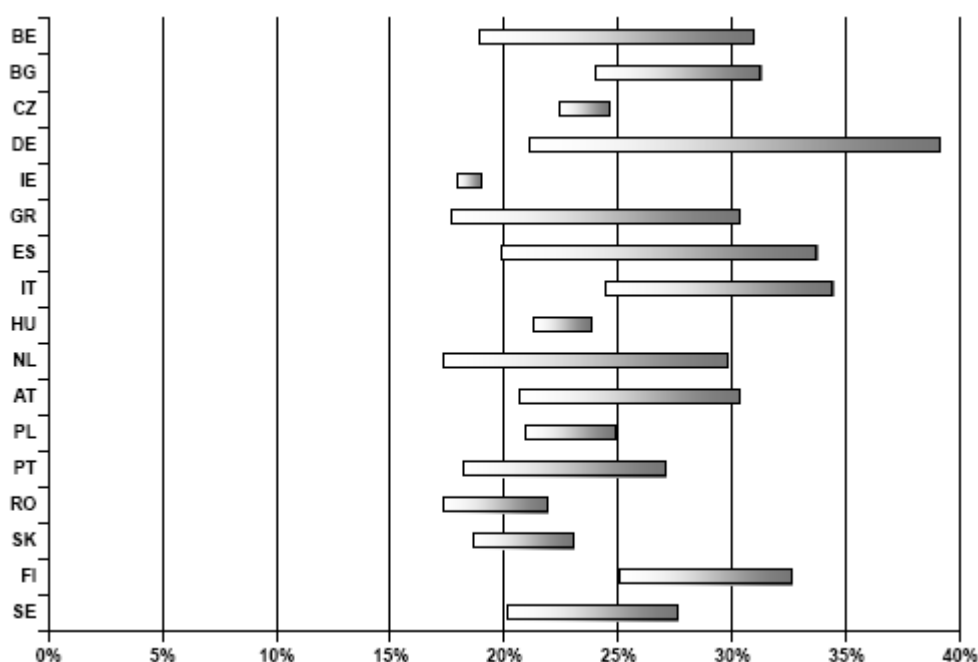
Source: Eurostat, EUROPOP2004

Figure 1.7: Shares of population aged 65 years and over in the NUTS 2 regions in 2031 by Member State



Source: Eurostat, EUROPOP2004

Figure 1.8: Projected ranges of shares of population aged 65 years and over in the NUTS 2 regions in 2031 by Member State



Source: Eurostat, EUROPOP2004

Demographic ageing is especially evident in the predominantly rural regions of some Member States, notably Portugal, Spain, Greece, Italy, Germany and France, where the proportion of people over 65 is high. Moreover in Germany, the Nordic and Baltic countries and in Southern Europe, strong rural-urban migration of females in the economically active age groups result in a high degree of “masculinisation” of the rural population (Study on Employment in Rural Areas 2006).

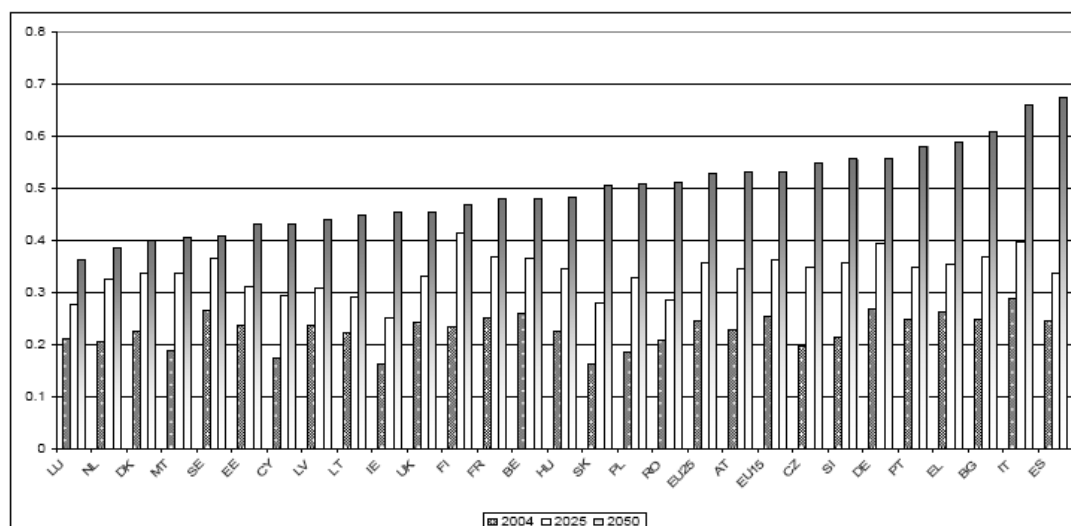
The size of the aged population is expected to grow not only in relative but also in absolute terms. Indeed, the number of people aged 60 from the current 75 million will increase up to 116 million in 2030 and close to 135 million in 2050. The number of people 80 and over (oldest old) is expected to nearly triple, rising from 18 million in 2004 to about 50 million in 2050. This impact will be more visible from 2025 onwards, due to the progressive ageing of the post-war baby boom generations and the expected increase in life expectancy.

According to the Eurostat baseline population projection, the ageing process will affect the whole structure of population. The median age of the EU will increase between 2004 and 2050 from 39 to 49 years (Lenzner 2006, European Commission 2006). The prolonged low fertility is the main cause of the shrinking of young people and in the near future of the working age people. The number of young people (aged 0-14) in the EU will continue to decline in absolute terms from around 100 million in 1975 to some 66 million by the year 2050. The population of working age (15-64) will be most numerous around the year 2010 (331 million) but will

subsequently decline to about 268 million by 2050. While ageing will affect all Member States of the EU, it will do so to varying degrees.

In 2006, the average old age dependency ratio (number of people over 65 divided by the number of people aged 15-64) for the EU-25 is 24.8%, and it ranges from 29.8% in Italy, 28.9% in Germany and 27.6% in Greece to the more favourable 16% in Ireland and Slovakia (Eurostat 2007) (Figure 1.9). The share of the older generation is increasing while that of those of working age is decreasing, therefore the old age dependency ratio is expected to more than double by 2050 (from 25% to 53%) in all the projections variants, with the highest rates projected for Italy and Spain (66-67%) and the lowest for Denmark, Luxembourg, Malta, the Netherlands and Sweden (around 40%) (Figure 1.9). In other words, anyone in this working age might have to provide for twice as many retired people as is usual today, if current trends prevail until 2050.

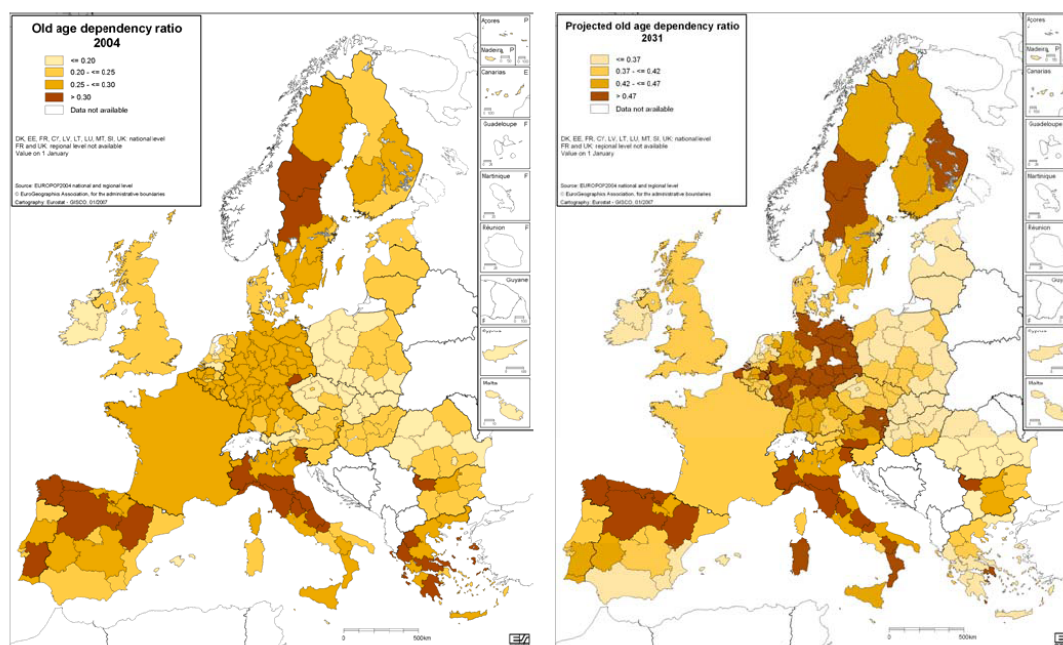
Figure 1.9: Projected old age dependency ratio by Member State and Acceding Country for selected years, "baseline" variant of the Trend scenario.



Source: Eurostat, EUROPOP2004

While it may still be one or two decades before the impact of ageing becomes clearly visible at the level of an entire country, the impact can already be observed at regional level (Figure 1.10). In 2004, the old-age dependency ratio is already over 30% in some of the Northern and Central Regions in Italy, in the Northern and Central Spain and in a number of regions in Greece and in Sweden (Lanzieri 2007). Indeed, the old age dependency ratio is expected to rise from a regional average of 25% in 2004 to 41% in 2030. The speed of the increase in the old age dependency ratio is projected to be faster in most regions of Germany, and in Austria, the south of Italy, Finland and Czech Republic. At the end of the projection period, the value of the ratio will vary across regions between 26% and 74%, i.e. between 1 and 3 elderly people for every 4 people of working age (Figure 1.10).

Figure 1.10: Projected old age dependency ratio by Member State and Acceding Country for selected years, "baseline" variant of the Trend scenario. 2004-2031



Source: Eurostat, EUROPOP2004

This illustrates the diversity of demographic situations which is likely to be a feature of the EU regions by 2031. Increasingly, regions will have to include the effects of long-term population trends in their regional medium-term strategies. A number of regions have already been active and are at the forefront of strategic thinking with actions to tackle the demographic challenge. (European Commission 2006). This new reality has led regions to face challenges such as, for instance, the high weighting of the handicapped population (e.g. Languedoc-Roussillon), a new spatial distribution of the population (e.g. Brandenburg), or the low activity rate of those over 50 years old (North-West of England) (European Commission, Directorate-General for Regional Policy 2007). In general, the most crucial challenges facing European Regions include the continuing provision of high quality public services to an ageing population, the consequences on urban development, and the shortage of skilled and unskilled workers (Joint Declaration of European Regions 2006).

Regions with declining populations consisting mainly of senior citizens will face difficulties in supplying essential public goods and services, such as health care, housing, urban planning, transport and tourism services, so that their environmental balance will also reflect the impact of an ageing population. To tackle demographic change also means to better connect the geographic areas, including the most isolated and remote ones, as this will help shorten distances and facilitate workforce mobility. Connecting geographic areas also has a social inclusion effect, both from the point of view of making services available to everyone and of combating the physical isolation of people and the consequences with respect to their cultural,

educational and employment involvement. Apart from transportation improvements, the problem of isolation can also be addressed through the diffusion of ICT, since it substitutes some physical services and infrastructures.

Regional policies also have to face profound social changes affecting the composition of families, particularly evident in the growing number of elderly people living alone (European Commission 2006). In 2000-2005 one out of eight people is a single adult living alone, most of whom are women. This percentage was highest in Germany and Finland (both 17%) and lowest in Malta (4%), Cyprus and Slovakia (both 5%) (Eurostat 2007). The increase in the number of very old dependent people also raises new problems of an economic, social or even ethical nature.

The projections illustrate the effects of successful structural reforms (e.g. in France), and show that policy actions can make a big difference in the ability to meet the challenges of the ageing population. Possible responses to alleviate ageing effects on socio and economic systems may operate both in the demographic and economic spheres. From a demographic point of view, both increasing fertility levels and increasing migration flows may have a favourable impact on ageing.

Increasing fertility levels seems to be the best driver to counterbalance an ageing population. Family-friendly policies aimed at removing the obstacles that impede Europeans from having the desired number of children are therefore utterly necessary. However, in some cases their effect on number of births might be modest. An increase of fertility rates can produce a reduced number of births if the generation of parents are less numerous compared to the past. A consequence of below-replacement fertility that has prevailed for several decades starting from the 1960s and 1970s, has begun to generate a negative population momentum. In other words, a new force for population shrinkage over the coming decades is due to the fact that past below-replacement fertility will soon result in declining numbers of potential parents (Lutz et al. 2005). A continuation of this trend could substantially exacerbate the future ageing of the population, reinforce a future decline in the population size and constrain the effectiveness of policy interventions aimed at increasing the number of births.

Migration may either alleviate or aggravate ageing population, depending on the forces of attraction of a region compared to others, such as better employment opportunities. But even positive and continuous inward migration flows cannot be considered the ultimate solution to counterbalance an ageing population, as it is clearly demonstrated by an exercise, which was conducted by the United Nations, in 2000 (UN population division 2000). Scenario calculations by the United Nations have shown that to stop population ageing, truly massive and increasing flows of young migrants would be required. For example, to keep the old dependency ratio unchanged for the future, Italy should admit an annual flow of more than 2 million of migrants, Germany, over 3 million migrants per year. As a consequence about 80% of the population in those countries would be foreign by 2050 (UN population division 2000). Although its impact on real population ageing is likely to be small, international migration may play a crucial role in solving future labour market shortages. Therefore, if increased immigration cannot prevent

ageing, it can realistically contribute to alleviating labour market bottlenecks (European Commission 2006).

From the economic point of view, increasing employment levels becomes necessary, with a notion that is consistent with the Lisbon strategy². This can be accomplished through: increasing the participation rate of women into the labour market; raising the employment rates of older workers and increasing effective retirement ages; increasing the number of foreign workers (at least in the short run, as foreign immigrants are destined to age themselves) (European Commission 2005).

The complex demographic trends found in EU member states can be addressed through national and regional goals that follow the Lisbon Agenda. This can only be achieved however, if the national and regional governments understand their unique demographic phenomenon and develop tailored strategies to support their specific ageing and fertility trends.

1.2 Major gender issues facing Europe

1.2.1 *Gender change: a key issue for European Union policy*

Gender equality is a fundamental right, a common value of the EU, and a necessary condition for the achievement of the EU objectives of growth, employment and social cohesion (European Commission 2006).

With the adoption of the “Roadmap for equality between women and men” on 1 March 2006, the Commission defined its priorities and its framework of action for promoting equality in the period to 2010, thus continuing its task of promoting gender equality and ensuring that all its policies contribute to that objective (European Commission 2006). The Roadmap represents the Commission’s commitment to continuing and intensifying its actions in this area.

This Roadmap outlines six priority areas for EU action on gender equality for the period 2006-2010 (COM/2000/335): equal economic independence for women and men; reconciliation of private and professional life; equal representation in decision-making; eradication of all forms of gender-based violence; elimination of gender stereotypes; promotion of gender equality in external and development policies. For each area, it identifies priority objectives and actions.

² During the meeting of the European Council in Lisbon (March 2000), the Heads of State or Government launched a “Lisbon Strategy” aimed at making the European Union (EU) the most competitive economy in the world and achieving full employment by 2010. This strategy, developed at subsequent meetings of the European Council, rests on three pillars: 1) An economic pillar preparing the ground for the transition to a competitive, dynamic, knowledge-based economy. Emphasis is placed on the need to adapt constantly to changes in the information society and to boost research and development; 2) A social pillar designed to modernise the European social model by investing in human resources and combating social exclusion. The Member States are expected to invest in education and training, and to conduct an active policy for employment, making it easier to move to a knowledge economy. 3) An environmental pillar, which was added at the Göteborg European Council meeting in June 2001, draws attention to the fact that economic growth must be decoupled from the use of natural resources. All the pillars are interrelated with both demographic and gender change.

This Roadmap builds on the experience of the Framework Strategy for equality between women and men for the period 2001-2005. It combines the launch of new actions and the reinforcement of successful existing activities. It reaffirms the dual approach of gender equality based on gender mainstreaming (the promotion of gender equality in all policy areas and activities) and specific measures. With the aim of assessing challenges and policy orientation in the EU, the Commission produces on an annual basis a key document – rich in statistical data: the “Report on equality between women and men”.

At the European Council of 23 and 24 March 2006, the Member States approved a European “Pact for Gender Equality” (Conclusions of the Presidency, 7775/1/06). The Pact demonstrates the Member States’ determination to implement policies aimed at promoting the employment of women and guaranteeing a better balance between professional and private life in order to meet the challenges of demographic change. In this context, it would appear essential to develop childcare services in order to achieve the Barcelona objectives; that is providing childcare services for 33% of children up to the age of three and 90% of children aged between three and the compulsory schooling age by 2010.

In the following paragraphs, opportune indicators will show that inequalities between men and women still persist across Europe, at different degrees according to the various geographic areas.

1.2.2 Substantial gender differences in employment rates

Important gender differences take place in the structure of employment all over Europe. Women still have a lower employment rate than men, despite the narrowing of the gender gap which has occurred in most countries over recent decades (European Foundation for the Improvement of Living and Working Condition, 2007).

In the EU-25 as a whole, some 72% of men aged 15–64 were in paid employment in 2006 as compared with just over 57% of women in the same age group. Women’s employment rate is much lower (31.7%) for older women (55-64 years old) (Table 1.7). Marked country differences are found in the employment rate for women, more so than country variations in the employment rate for men (Eurostat 2008). The proportion of men of working age in employment, however, varied, in the EU, from around 81% in Denmark and the Netherlands to just under 63% in Bulgaria and 61% in Poland (Table 1.7). For women, the proportion varied more, from just over 73% in Denmark and just under 71% in Sweden to just over 46% in Italy and only 35% in Malta (Eurostat 2008) (Table 1.7).

Table 1.7: Employment rate in Europe. 2006. Total, Females and Males

2006	Employment rate (15 to 64 years)		
	Total	Males	Females
European Union (27 countries)	64.5	71.6	57.3
European Union (25 countries)	64.8	72.1	57.6
European Union (15 countries)	66.2	73.6	58.7
Belgium	61	67.9	54
Bulgaria	58.6	62.8	54.6
Czech Republic	65.3	73.7	56.8
Denmark	77.4	81.2	73.4
Germany (including ex-GDR from 1991)	67.5	72.8	62.2
Estonia	68.1	71	65.3
Ireland	68.6	77.7	59.3
Greece	61	74.6	47.4
Spain	64.8	76.1	53.2
France	63.8	69	58.8
Italy	58.4	70.5	46.3
Cyprus	69.6	79.4	60.3
Latvia	66.3	70.4	62.4
Lithuania	63.6	66.3	61
Luxembourg (Grand-Duché)	63.6	72.6	54.6
Hungary	57.3	63.8	51.1
Malta	54.8	74.5	34.9
Netherlands	74.3	80.9	67.7
Austria	70.2	76.9	63.5
Poland	54.5	60.9	48.2
Portugal	67.9	73.9	62
Romania	58.8	64.6	53
Slovenia	66.6	71.1	61.8
Slovakia	59.4	67	51.9
Finland	69.3	71.4	67.3
Sweden	73.1	75.5	70.7
United Kingdom	71.5	77.3	65.8

Source: Eurostat New Cronos 2006

In 12 countries in 2006, the level of female employment already exceeds the 60% target set by the European Employment Strategy (the so called Lisbon strategy), according to results from the European Labour Force Survey (2006), while in the other countries the shortfall in women's employment rate ranges from small to substantial. In the Central and Eastern European countries where a shortfall exists, it was caused by the economic recession and the transition to market economies. Recovery has only been partial in the subsequent period (European Foundation for the Improvement of Living and Working Condition, 2007). In some of the other countries showing a major shortfall, such as Greece or Malta, women's employment rates have traditionally been low and are increasing slowly.

Changes occurred over the period 2000–06. Whereas the proportion of men aged 15–64 in employment increased by less than 1 percentage point in the EU-25 as a whole over these six years, the proportion of women in employment rose by almost 4 percentage points. Increases in the employment rate of men were particularly marked in Bulgaria, the three Baltic States and Slovakia, while the employment rate declined by more than 1 percentage point in the three Benelux countries, Portugal and Romania. Among women, the employment rate increased by more than 1 percentage point in all Member States except the Czech Republic (where it remained much the same), Poland (where it fell slightly) and Slovakia. Increases were especially large in Bulgaria, Estonia, Spain, Italy, Cyprus and Latvia (Eurostat 2008).

These changes in employment rates mean that women came to account for a larger share of the total work between 2000 and 2006. Nevertheless, women made up only just over 44% of those of working age in employment in the EU-25 as a whole (Eurostat 2008). The share of women in full employment varies across the EU ranging from 50% in Estonia and almost 50% in Lithuania – the only two countries in the EU where women make up much the same proportion of the people in employment as men – to less than 40% in Greece, Italy and Malta (Eurostat 2008).

In 2005, employment rates for males aged 15–64 were about 15 percentage points higher than for females (72% compared to 56%) (Eurostat 2007). The gap was 40 and 44 percentage points in Malta, 24–28 points in Greece, Spain and Italy but less than 10 points in Finland, Sweden, Estonia, Lithuania Denmark, Latvia and Slovenia. The gap was also low in Bulgaria, Iceland and Norway (Eurostat 2007). Males were leaving the labour market in 2004 on average at the age of 60.9 years, half a year older than females (Eurostat 2007). Women also have a higher unemployment rate than men (9.7% against 7.8%) (European Commission 2007).

1.2.3 Occupational segregation

Employment is highly gender segregated: women are over-represented in some types of jobs and under-represented in others relative to the overall proportion of jobs they hold. Segregation exists across occupations, sectors and types of workplace. For instance, women constitute, on average, only 30% of entrepreneurs in the EU-27, yet they are generally over-represented in jobs in certain services. In the EU-25 in 2005, some 61% of employed women worked in just six sectors of activity (Eurostat 2008). All of these sectors are involved the supply of services. They consist of health care and social work (in which 17% of all women in work were employed), retailing (12.5%), education (11.5%), public administration (7%), business activities (7%) and hotels and restaurants (5%) (Eurostat 2008)

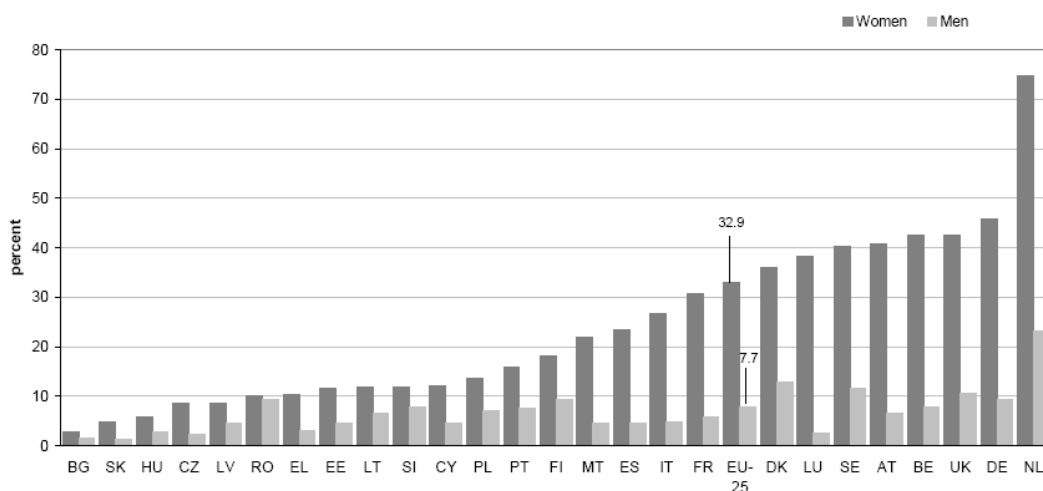
Compared with men, women's employment is more concentrated in the public sector (European Foundation for the Improvement of Living and Working Condition, 2007). Over one third of women's jobs in the EU27 are in the public sector or joint public-private organisations, compared with one quarter of men's employment.

The degree of concentration of employment for both women and men increased slightly in the five years up to 2005, although more for women than for men. The increase over the period is to

a large extent due to the growth of jobs in health and social work, education and business activities. All three sectors are ones in which overall employment expanded at a relatively high rate (Eurostat 2008). The degree of concentration of women’s employment is quite similar across Member States (Eurostat 2008).

In the EU-25, 33% of employed women were working part-time in 2005 compared to only 7.7% of males (Eurostat Database) (Figure 1.11). Women working part-time were particularly prevalent in the Netherlands (75%), Germany (44%) and the United Kingdom (43%) (Eurostat 2007). Part-time employment is rare for women in nine of the EU27 countries, where it accounts for no more than 10% of their employment; these countries are Greece plus eight post-communist Member States: Bulgaria, the Czech Republic, Estonia, Hungary, Latvia, Romania, Slovakia and Slovenia (European Working Condition Survey 2005). In 13 countries, part-time employment is more common, with more than one in three employed women work part time in eight of the EU27 countries: Austria, Belgium, Denmark, Germany, Luxembourg, the Netherlands, Sweden and the UK. At least one in five employed women working part time in another five countries: Finland, France, Ireland, Italy and Malta (European Foundation for the Improvement of Living and Working Condition, 2007).

Figure 1.11: Share of part-time workers in total employment, in EU Member States - 2006



Source: Report On Equality Between Women And Men – 2007

Part-time employment is more widespread among women in professional, service and sales, and unskilled occupations than elsewhere. Women working part time account for almost a quarter of the workers in these occupational groups, and the rate of part-time work in these occupational groups increases by a few percentage points when male part-timers are also included (European Foundation for the Improvement of Living and Working Condition, 2007). Part-time workers of either sex are also more heavily concentrated in the public sector than are

full-time workers (European Foundation for the Improvement of Living and Working Condition, 2007).

Throughout the European Union, women were more likely to have a fixed-term contract than men, especially in Cyprus and Finland, where the gap was more than 5%. When expressed as a proportion of employees only, the rate of fixed-term employment contracts is 14% for women and 10% for men (European Foundation for the Improvement of Living and Working Condition, 2007). Around half of women were in such jobs because they could not find a permanent job (Eurostat 2008).

The proportion of men and women employed on fixed-term contracts varies markedly across the EU. In Spain the proportion of fixed-term contracts was highest, 32% and 36% for men and women, respectively (Eurostat 2008). At the other extreme, less than 6% of men and women employees were on fixed-term contracts in Slovakia and the UK and under 4% in Ireland and Romania (Eurostat 2008). The proportion of women employees in fixed-term jobs involuntarily increased in most Member States in the period 2000-2005 (Eurostat 2008).

On average, women have been employed by their current employer for a shorter period of time than men, with the median period for women being five years and seven years for men (European Foundation for the Improvement of Living and Working Conditions, 2007).

Vertical segregation is also still very common. Women are generally under-represented in the higher level, better-paid managerial and senior positions in organisational hierarchies and occupational career ladders and over-represented in low-paid jobs.

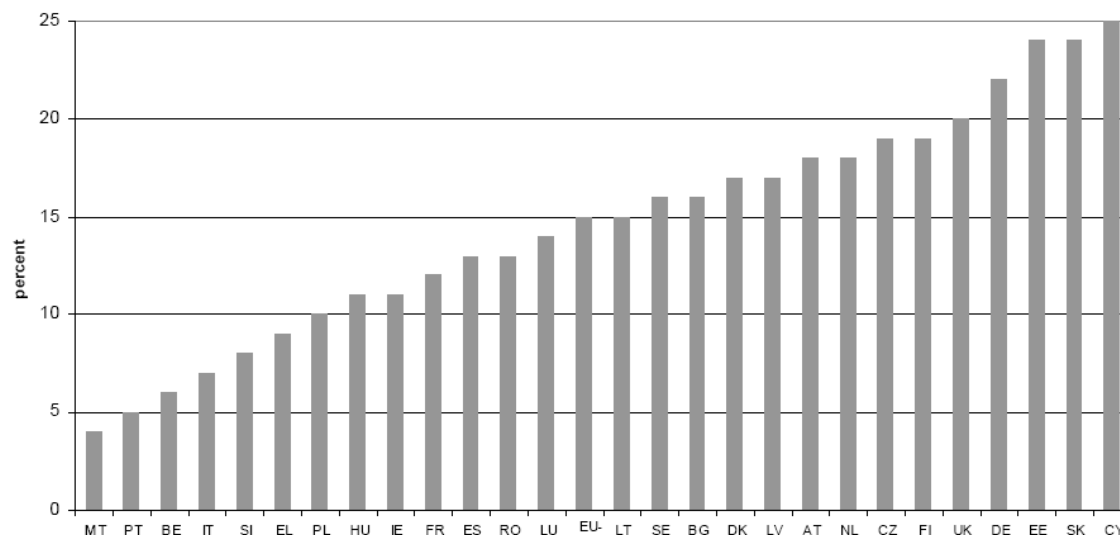
Among full-time, employed workers in the EU-27, 23% of men have some supervisory responsibilities, compared with 15% of women (European Foundation for the Improvement of Living and Working Condition, 2007).

1.2.4 Gender inequalities in earnings

Women's earnings remain on average below those of men in all EU countries (Eurostat 2007). In the EU-25 countries, the average gross hourly earnings of women in 2004 are estimated to be 15% less than the gross hourly earnings of men. The gender pay gap in unadjusted form – difference in average gross hourly earnings of men and women as a percentage of men's average gross hourly earnings, varied between 4% and 2% in 2004. The smallest differences are found in Italy, Malta, Portugal and Slovenia, the biggest in Estonia, Germany, the United Kingdom, Cyprus and the Slovak Republic (Figure 1.12).

At EU level, the difference has remained fairly consistent since 1994, the first date for which data is available (Eurostat 2007). The statistics show that development over time varies at the country level. Differences decreased in Hungary, Malta and the Netherlands, and slightly increased in Germany. In the remaining countries, pay differences remained fairly stable over time (European Commission, 2004).

Figure 1.12: Pay gap between women and men in unadjusted form in EU Member States – 2005 (Difference between men’s and women’s average gross hourly earnings as a percentage of men’s average gross hourly)



Source: Report On Equality Between Women And Men – 2007

Gender segregation is a major factor in the gender pay gap, as women are disproportionately concentrated in lower paid jobs and the lower ranks of the better-paid managerial and professional occupations. Furthermore, women still earn less than men even when they have similar jobs, qualifications and experience, due to sex discrimination and unequal treatment (see, for example, Plantenga and Remery, 2005). These gender inequalities in earnings mean that in most household situations the man contributes the larger part of the total household income. For example, the results from the European Working Condition Survey (2005) indicate that the man contributes the most to the household income in four out of five dual earner couples (81% of dual-earner couples without children and 84% of those with children).

1.2.5 Women and men in decision-making positions

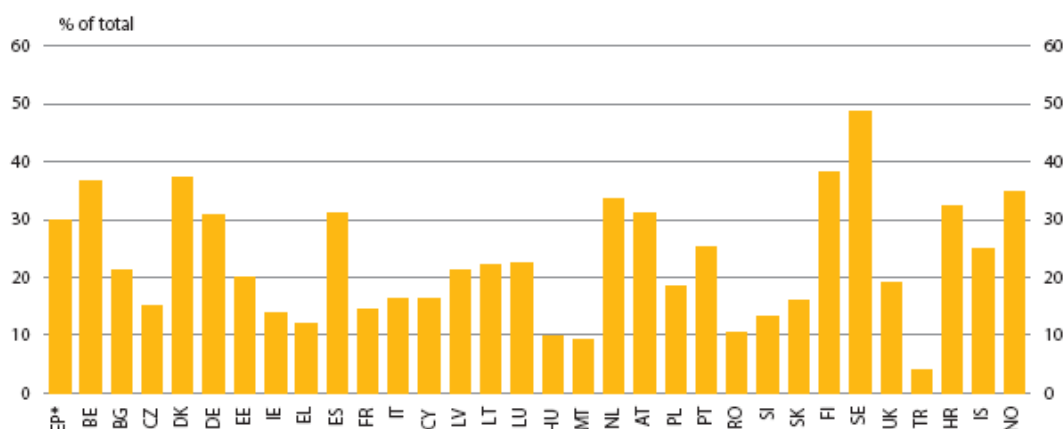
Women’s representation in key positions of power and influence is still far below that of men. In all European Member States there are fewer women members of national parliaments than men, in most cases, considerably fewer (Eurostat 2008) (Figure 1.13). Sweden is the only country in the EU where women made up close to half of the Members of Parliament (just under 49%). In four other countries women made up more than a third of the Members of Parliament but less than 40%: Belgium, Denmark, the Netherlands and Finland (Eurostat 2008).

In more than half of the remaining Member States (13 of the 22), women were less than 20% of the Members of Parliament and in seven of these—Ireland, Greece, France, Romania and

Slovenia—women comprised less than 15%, but more than ten per cent. In Hungary and Malta, women accounted for only around 10% of Members (Eurostat 2008).

The representation of women in national governments reflects an even greater gender imbalance than that of national parliaments (Eurostat 2008). The lack of gender balance in most countries among politicians in government is mirrored by a similar or even bigger imbalance among civil servants (Eurostat 2008).

Figure 1.13: Women as a share of members of parliament, 2006



Source: Report On Equality Between Women And Men – 2007

1.2.6 Women's dual burden

Across EU-25, the division of responsibilities in the home is highly gendered, with women spending much more time in unpaid work as housework and care work for children and adult dependants.

Time use surveys, carried out on a reasonably comparable basis in 14 EU Member States between 1998 and 2004, reveal that women and men of working age spend their time in different ways. Focusing on those aged 25–44, men in the 14 countries spend on average some 308 minutes a day, or just over five hours, working in paid employment as compared with 176 minutes, or just under three hours a day in the case of women (Eurostat 2008).

Women spend considerably more time doing unpaid domestic work than men. In the 14 countries taken together, they spent some 278 minutes a day on average as opposed to 116 minutes a day in the case of men, i.e. some 2 hours 40 minutes a day more (Eurostat 2008). The difference is especially large in Italy, where women spent over five hours a day on domestic work, whereas men spent just 73 minutes. Women spend more time than men on childcare too.

The latter took up only 22 minutes a day on average of men's time but one hour a day of women's (Eurostat 2008).

Women usually spend more time in the lower income countries conducting unpaid domestic work than in the higher income ones — around 22 minutes a day more on average. This means that overall, work of all kinds took up over an hour more a day in the five lowest income countries than in the five highest income ones (Eurostat 2008). By contrast, men spent slightly less time in the lowest income countries doing unpaid work. Overall while work absorbed more of their day than in lower income countries, the difference is much smaller than for women (only around a quarter as large) (Eurostat 2008).

The longer time spent on unpaid work means that in total women in the 14 countries spent an average of 30 minutes more a day working than men (Eurostat 2008). In the highest income countries, however, the difference was only around 10 minutes, while in the lowest income ones, it was almost an hour. The shorter time spent working by men in the 14 countries is reflected in them having more leisure time than women — some 36 minutes a day more on average.

1.2.7 Work-life balance: the virtuous link between demographic and gender change

Policies on gender equality may contribute significantly to meeting demographic challenges (European Commission 2006 and 2007). More specifically, they can stimulate the employment of women and at the same time support the individual choices of women and men, including decisions on the number of children they wish to have. Increased female employment is necessary at the *macro* level for compensating for the projected decline in the working population, and at the *micro* level as a strategy to reduce both the risk of female poverty (in case of divorce, for instance, or when they get older) and child poverty (children in one-income families are more at risk).

Greater gender equality and a better work/life balance seem to be conducive to increasing both female labour force participation and fertility, at least in those countries where major efforts have been made for reconciliation. However, the relation between female employment and fertility rates is much more complex. At the level of individuals, several studies have postulated theoretically and documented empirically the existence of an inverse relationship between fertility rates and labour market participation of women. Conversely, the relation between these two variables differs when observed across countries. Country correlation between female employment rates (or labour force participation rates) and total fertility rates may have changed (Ahn and Mira, 2002; and Del Boca, 2003). Others suggest that while the relationship is still negative, the degree of incompatibility between paid work and caring for children has diminished (Engelhardt et al., 2001; and Kögel, 2001, OECD 2007).

At the macro level, in fact, there has been a reversal in the correlation between fertility and female labour force participation among OECD countries since the middle of the 1980s. This

cross-country correlation switched from strongly negative in 1970 to clearly positive in more recent years (European Commission 2006, OECD 2007). Today, countries where many women are in paid employment and are often supported by effective instruments to reconcile work with private and family responsibilities (for both men and women), tend to have higher fertility rates than countries where fewer women work (OECD 2007, Plantenga and Remery 2005). Countries where it has remained difficult to reconcile employment and have a family tend to have experienced a large decline in births combined with only a modest increase in female labour force participation. In Italy, for example, female force participation went from about 34% in 1975 to just about 51% in 2004, a fairly low figure when compared to the 75% in Sweden. The TFR in Italy and Sweden stood at 2.5 and 2.3 during the first half of the 1960s, but in 2004 was 1.3 and 1.8, respectively. The availability of childcare or the availability of family-friendly flexible work arrangements helps to combine work and family and appears to have a particular effect on the probability of working for highly educated women.

The behaviour in the labour market is affected by at least two issues: first, different institutional situations in different countries and second, cultural differences in gender roles and what is considered as “good motherhood and fatherhood” (Parnanen et al. 2005).

First, there are different possibilities in different countries for men and women to find a balance between work and family. A research carried out by Parnanen et al. in 2005 (using data from the European Working Condition Survey 2000) shows that among working full-time women, 24% report difficulties.

There are extensive differences between the EU countries in the rights, lengths and subsidies of parental leave, children’s homecare or in possibilities of reducing working hours (for mothers and fathers) (Parnanen et al. 2005; OECD 2007; Plantenga and Remery 2005). Childcare facilities also make a major difference to the possibilities of participating in full-time or part-time employment. The availability and the cost of childcare are important issues that should be included in studies concerning work-life balance (Parnanen et al. 2005). It is true however that national and local budgets will have fewer and fewer resources to improve childcare facilities in ageing societies, and that could prompt tensions among different objectives.

Second, cultural assumptions of the gender roles in different countries affect the labour market behaviour of men and women. Perceptions of “good motherhood” and “good fatherhood” also vary among the EU countries. The social acceptability of working mothers or of reducing fathers’ working hours because of family life presumably differs between the countries. The institutional frame both reflects and perpetuates these ideas (Parnanen et al. 2005).

1.3 Concluding remarks: demographic and gender changes and the ERDF intervention areas

In the previous paragraphs evidence has been provided that demographic and gender changes are main concerns on the European policy agenda. Population decline and population ageing

are the major issues that, to different degrees, all European Countries have to deal with both in the short and in the long term. The European Commission states that, given the complexity of the challenges, an overall strategy seems to be essential, both at EU and at national level.

Prevention of demographic decline and an overall decrease in births may be possible - at least partially - if family-friendly policies are promptly implemented, especially in those countries where fertility rates have reached extremely low levels. The European Commission (2006) suggests policies that aim: to reduce the inequality of opportunities offered to citizens with and without children; to offer universal access to childcare and education services; and to manage working hours to give both men and women better opportunities for balancing private and working lives. Tempo policies aimed at bringing forward the entry into motherhood are also encouraged. In addition, effective gender equality policies can redistribute the costs of children more equally among men and women. On the one hand, effective policies can reduce a mother's burden in childcare and domestic activities and on the other hand, they can reduce the costs of children for working mothers in terms of their labour market participation.

The implications of demographic change for the economic system will be crucial. During the coming decade, the baby boom cohorts will start retiring from the labour market. Young cohorts entering the labour market will be much fewer in number as a result of prolonged low fertility. In about ten years, total employment in the EU could start to fall creating shortages in the labour forces. The European Commission claims that with the support of specially adapted employment policies, this phenomenon is likely to be temporarily offset during the next decade by increasing rates of employment (European Commission 2006). Consistently with the Lisbon strategy, employment can be increased through raising the employment rates of older workers and increasing effective retirement ages, by increasing women's participation in the labour market, and by increasing the number of foreign workers (European Commission 2005).

Recent projections show that although the working-age population will begin to fall from 2010 onwards, the total number of people in work in EU- 25 will continue to increase until around 2017. More than two thirds of this increase will be the result of a higher number of women in work, older women being gradually replaced by better-educated younger women with greater involvement in working life. The remainder is accounted for by the substantial increase anticipated in the employment rate for older workers (aged from 55 to 64 years). The expected positive developments tend to create a "window of opportunity" permitting the implementation of reforms before the effects of population ageing are fully perceived (European Commission 2006). It is above all the responsibility of the Member States to formulate specific responses. Recent experience in this area is encouraging, as the first retirement reforms have begun to bear fruit (European Commission 2006). However, increasing levels of employment offer temporary relief, as the full burden of the demographic changes would still subsequently be felt. Even if the objective of 70% in the overall rate of employment as set out in the Lisbon strategy is reached, the total number of employed people is set to decrease by 30 million between the end of the decade and 2050 (European Commission 2006).

Active ageing is one of the pillars of European policies facing population ageing. Indeed, if older workers constitute an increasing proportion of global labour and economic production resources, many countries still employ only a relatively small number of them. The Stockholm European Council of 2001 set the objective that 50% of the EU population in the 55-64 age-group should be in employment by 2010, while the 2002 Barcelona European Council concluded that a progressive increase of about five years in the effective average age at which people stop working in the European Union should be required by 2010 (European Foundation for the Improvement of Living and Working Conditions 2008). Many Member States are reviewing their tax and benefits systems in order to find ways to encourage workers to remain in the labour market for longer. This includes such measures as making early retirement less financially attractive, making it more difficult to remain on pension benefits until retirement, promoting flexible phased retirement solutions, and combining pensions with part-time work. The policy emphasis is on lifelong learning and improving workers' skills throughout their working lives: older people with low skill levels are almost twice as likely to be out of work as those with high skills and they generally have shorter working lives (European Foundation for the Improvement of Living and Working Conditions 2008). The EU's active ageing strategy proposes tax benefits for companies in recruiting older workers and adapting the labour market to the needs of older workers. Consequently, businesses are coming up with policies and practices to tackle issues regarding health, work organisation, training and work-life balance for their older workforce (European Foundation for the Improvement of Living and Working Conditions 2008).

Increasing women's labour market participation responds to the European Union strategy of facing both demographic challenge and gender inequalities: women's employment rate should reach 60% by 2010, consistently with Lisbon targets. For reaching this aim it is necessary to take into account that the major obstacle for women's participation is family responsibility. Younger women take care of children while older women shoulder the burden of care responsibilities for elderly relatives. This can present difficulties in finding employment, due to gender discrimination. Therefore the objective cannot be attained without solving the work and family reconciliation issue; and without an increase in men's participation in domestic and care tasks. Many more women than men work part time, often in order to fulfil domestic and caring responsibilities. This has implications for women's income, career prospects and retirement provision, with the risk of women not having an adequate income in later years. Periods of maternity leave can also impact on women's career progress, as can parental leave (European Foundation for the Improvement of Living and Working Conditions 2008). To make employment more attractive for women it is necessary to recognize that the requirements of female employees change during the course of their working life. Career paths of women tend to be less straight than those of men, interrupted due to key life events and later re-launched. The need to adapt working time arrangements and career paths to changing requirements has led some companies to systematically and regularly review the situation of their female employees (European Foundation for the Improvement of Living and Working Conditions 2008).

Ageing will lead to great pressures on public spending, related to pensions, health and services for the elderly. The situation varies widely from one country to another, but for the EU-25, it is projected that age-related public spending will rise by 3-4 GDP points between 2004 and 2050, representing an increase of 10%. These upward pressures will be felt from 2010 onwards and will become particularly pronounced between 2020 and 2040 (European Commission 2006). Plausibly, ageing will also bring about sharp rises in public spending on health and long-term care, even if much will depend on the future improvement in the state of health of the elderly. Such an improvement will require, in particular, better adapted healthcare services and a preventive approach to chronic diseases which could be helped by the use of new technologies. If the gains to be made in terms of life expectancy were generally acquired in good health and without disability, the projected increase in public spending on health and dependency care due to ageing would be reduced by half (European Commission 2006).

As the number of dependent older people increases, the care sector has needed to develop in parallel. While most care is still provided by spouses and adult children, the role and contribution of formal paid care workers has become - and will become - more important. The Lisbon goal of increasing women's employment rates - also for older women- will further affect this, as women tend to carry most responsibility in caring for family members (European Foundation for the Improvement of Living and Working Conditions 2008). Therefore reconciliation of working and caring responsibilities (also for grandchildren or for older members of the families) is becoming a key issue for the older workforce as well. Policymakers are looking for sustainable strategies to deal with the consequences, for example by providing tax breaks for those employing carers. An increasing demand for workers in the care sector also raises concerns about where suitable care workers can be found. In this context migrants often make up a large part of the workforce, so the care sector is also an important testing ground for policies directed towards integration of migrants and the transferability of qualifications (European Foundation for the Improvement of Living and Working Conditions 2008).

As the previous paragraphs have indicated, more and more countries will experience a national population reduction over the coming years, signalling that immigration might become increasingly important. Around 56 million people entering the country and finding jobs would be needed to compensate for the projected reduction in the population of working age for the EU-27 (European Commission 2006). This will at first meet the needs of the European labour market, which will need to attract a qualified labour force from outside. The need for external unskilled labour will also remain very high. While the needs are high, current national policies on immigration from third countries are not uniform. For these reasons, the EU is now working with the Member States to develop elements of a common policy on legal immigration, focussing particularly on immigration for work purposes in order to satisfy requirements in certain sectors of the labour market (European Commission 2006). This policy should be supplemented by tighter policies on integrating third-country nationals, allocating greater financial resources, and by striking up partnerships with emigration countries. At the same time, in terms of the internal mobility of Community citizens, the transition towards full freedom of movement for workers within an enlarged EU of 27 Member States will continue up

to 2014 (European Commission 2006). This internal mobility will help offset imbalances in labour markets in Europe and should be taken into consideration in planning immigration policies.

In summary, the European Commission seems confident regarding the demographic future of Europe: it is possible to tackle the demographic challenge if the window of opportunity of the next ten years is used (European Commission 2006). This should be done in parallel with the reduction of gender gaps in employment and in unfair division of domestic tasks, in order to generate a virtuous link, which also allows the EU to cope with ageing and population decrease in the long run.

1.3.1 Gender equality and demographic changes from a policy point of view: main approaches and strategies

1.3.1.1 Gender equality

Concerning the gender equality dimension, within the European Union (EU), Member States have different degrees of gender sensitivity and (gender) policy action is defined through *differentiated approaches*. *Scandinavian and Anglo-Saxon countries are usually more advanced in the mainstreaming of a gender dimension in policy-making, while Continental and Southern European countries are still mainly relying on specific gender measures, even if declaring the adoption of a dual approach.*

Some innovative approaches, tools and methodologies have been developed all along the policy cycle³, but their use and dissemination have been partly limited by the low awareness of the importance of gender equality for socio-economic growth among policy makers and administrations both at national and local level in spite of several studies highlighting the links between socio-economic development and gender equal opportunities.

Many studies show that the effective improvement of development conditions is strictly connected to the increasing participation of women in the labour market and that women can offer an essential contribution to socio-economic growth. In other words, a gendered approach is able to pursue, at the same time, efficiency and equity because (a) gender equal opportunities allow the better “use” of female resources; (b) better conditions of socio-economic development can offer more and more equal possibilities of participation and inclusion for both women and men⁴.

³ See, for example, European Commission, *Mainstreaming Equal Opportunities in the Structural Funds: how Regions in Germany, France and United Kingdom are Putting into Practice the New Approach*, DG XVI, April 1999; and Presidenza del Consiglio dei Ministri – Dipartimento per le Pari Opportunità, *Linee Guida per l’Attuazione del Principio di Pari Opportunità per Uomini e Donne e Valutazione dell’Impatto Equitativo di Genere nella Programmazione Operativa*, Roma, 1999.

⁴ Dipartimento Pari Opportunità Presidenza del Consiglio dei Ministri – IRS, *Strategies and experiences carried on local development processes at European level*, December 2007.

From a *policy point of view*, it can be said that *almost all Member States have some kind of documents⁵, as formal political support, for the implementation of gender equality and/or gender mainstreaming*. The Table below - which summaries the results of a country survey conducted by the Ministry of Integration and Gender Equality of Sweden in the first few months of 2006 - clusters European countries in relation to the existence and type of national plans (formally approved by Government or Parliament) for Gender Equality and Gender Mainstreaming. It emerges that, as of the beginning of 2006, there were six Member States with specific plans/programmes for gender mainstreaming (Austria, Denmark, Estonia, Finland, Germany and Sweden); another six countries presented mixed plans for gender equality policy and gender mainstreaming (France, Latvia, Lithuania, Luxembourg, The Netherlands, Portugal); five Member States produced gender equality plans but not special plans for the implementation of gender mainstreaming (the Czech Republic, Greece, Hungary, Slovenia, Spain); seven Member States, with no formal plans for Gender Equality and/or Gender Mainstreaming (Belgium, Cyprus, Italy, Malta, Poland, Slovakia, United Kingdom)⁶. Moreover, some Member States (Austria, Belgium, the Czech Republic, Denmark, Estonia, Finland, Ireland, Latvia, Slovenia, Spain, Sweden, United Kingdom), express the mandatory obligation for the state to carry out a gender impact analysis before introducing legislation, bills or legal acts. (Sternner and Biller 2007).

⁵ Plans, laws, declarations, etc.

⁶ Belgium is preparing a National Action plan on Gender Mainstreaming. Cyprus is also preparing a national plan for gender mainstreaming. Italy does not have a plan for gender equality nor gender mainstreaming. Malta does not have a plan. Poland used to have a national action plan for women but now has a National Road Map for the Family. Slovakia has no plan for gender mainstreaming. The United Kingdom has no national plan approved by government or parliament, but has high-level strategic targets in specific areas, for example, the Gender Equality Public Service Agreement and Women and Work Commission Action Plan.

National plans for gender mainstreaming and gender equality, 2006

Type of Plan	Countries
Plans for gender mainstreaming	Austria, Denmark, Estonia, Finland, Germany and Sweden
Mixed plans (gender equality policy and gender mainstreaming)	France, Latvia, Lithuania, Luxembourg, The Netherlands, Portugal
Only gender equality plans	Czech Republic, Greece, Hungary, Slovenia, Spain, Malta.
No Plans	Belgium and Cyprus (preparing a National Action plan on Gender Mainstreaming), Italy, Poland (National Road Map for the Family), Slovakia, United Kingdom (high-level strategic targets in specific areas)

Source: IRS adaptation from Sterner, G. and Biller, H. (2007), *Gender Mainstreaming in the EU Member States. Progress, Obstacles and Experiences at Governmental level*, Ministry of Integration and Gender Equality, Sweden

At local and regional level there is *less evidence of a systematic and institutionalised planning for gender mainstreaming* across and within European countries and, at sub-national level, the presence of official and *specific plans or guidelines on Gender Mainstreaming is still differently spread within countries.*

With specific regard to *Gender Impact Assessment (GIA)* the core tool for implementing gender mainstreaming, this methodology *appears to be more developed in some regions and government agencies than in others, as an effect of the still initial stage at which the introduction of Gender Mainstreaming process is* (Rubery et al., 2000). For example, in Belgium, more progress has been made in the development of GIA guidelines in the Flemish region, which is the first region in Belgium to have introduced regional and now local GIA guidelines, than in Wallonia or the Brussels-capital region; in Germany each *Länder*, which plays a major role in employment policy, has its own philosophy and strategy for the gender mainstreaming concept. In particular, Saxony-Anhalt was one of the first to develop specific reforms to develop gender mainstreaming. GIA guidelines have been issued by the Federal Employment office which provides a framework for GIA of employment policy at the regional and local level. In the UK, the recently established Welsh Assembly, Scottish Parliament and the Northern Ireland Equality Commission have taken initiatives to promote gender equality and mainstreaming that include proactive elements. Such decentralised bodies have policy responsibilities to promote equality and mechanisms are in place to ensure that the impact on equal opportunities is taken into account in every policy decision. Impact assessment statements are required for all Executive Bills presented to the Scottish Parliament, for which a mainstreaming checklist has been developed, and a toolkit for Structural Fund programmes has been developed. In Northern Ireland public bodies are obliged to carry out equality audits and to prepare statements about how they propose to mainstream equality, while their implementation is overseen by the Equality Commission. In the Welsh Assembly a baseline survey was conducted

to evaluate the current practices of the Assembly's functional divisions and these will be used in annual reports to monitor policy progress towards promoting equality, under the supervision of the Assembly's Equal Opportunities Committee (Rubery et al., 2000).

Nevertheless, *in the majority of Member States the promotion of Gender Mainstreaming and, more in general of Gender Equality, at regional and local level is less structured than that at the national level and varies considerably within the same country.* Only a few countries have created regional and/or local (at provincial or municipal level) governmental institutions designated to handle Gender Mainstreaming. Whereas, at this territorial level, it is more common to find institution/experts appointed with the broader task of promoting and implementing gender equality. In many cases the institution of such entities does not stem from a national plan, rather from local initiatives or from pilot projects which successively are extended to other provinces/municipalities. Finally, a form of cooperation between national institutions and women associations acting locally seems to be quite widespread across European countries. In a similar manner, institutional action plans at sub-national level are still not common across European Member States and generally are a prerogative of countries with a long tradition in gender related issues.

A broad analysis of the initiatives carried out to introduce gender mainstreaming shows that Gender Mainstreaming projects are generally “locally oriented”, rather than “nationally oriented” and the local dimension is increasingly assuming a strategic role in the implementation of gender equality (gender mainstreaming and positive actions).

As evidenced in Samek (2003) there are several reasons for this:

- The local level is becoming increasingly relevant in the design and implementation of most policies which affect women's positions in the labour market (employment policies, social policies and community services, development policies, cultural policies), being closer to the needs of the local population, which may be differentiated at the territorial level.
- The adoption of a gender mainstreaming approach is easier to be accomplished at the local level, where the integration of policies aimed at sustainable socio - economic growth is usually more common than at higher levels of policy making.
- At the local level it is probably easier to involve all the relevant actors (local authorities, enterprises, third system/social economy organisations/NGOs, social partners, local associations) in the pursuit of shared interests through the development of local networks and partnerships. It is then possible to mainstream equality issues and to build a gender awareness among all the relevant actors, by maximising the mobilisation of partnerships and local economic and social resources.
- The involvement of women and their representatives in decision making at the local level has positive effects on the implementation of gender equality policies, since it may build a shared vision of the importance of gender equality as a resource for local development which makes it easier to adopt a gender mainstreaming approach across all policy areas.

Indeed, the majority of projects is promoted by networks of local public authorities and/or local private actors and is implemented on restricted territorial areas (principally at regional/provincial and municipal level). Such projects are multi-faceted and cover a wide range of actions and strategies to introduce Gender Mainstreaming in the process of local development. From a broad perspective, there can be traced, among European countries, three main procedures to disseminate Gender Mainstreaming into local territories. The first strategy/approach entails training local actors and building capacities on models to implement Gender Mainstreaming and it is quite common across Member States. The second approach promotes Gender Mainstreaming at the local level by the creation of networks across local actors and local authorities. These networks are usually directed to accelerate and give visibility to the Gender Mainstreaming processes within local territories through the dissemination of experiences/good practices and by the strengthening of information and participation across the network members. Such a strategy is widely diffused in Italy, but also in other Southern European countries. Finally, the third common strategy to implement Gender Mainstreaming into local territories is represented by institutionalising Gender Equality monitoring and creating local “Observatories” and indicators.

1.3.1.2 Demographic change

Generally speaking, demographic issues involve *three main dimensions related to ageing, migration flows and female reproductive behaviours*. The European patterns that can be identified on these issues suggest that the *Scandinavian countries (but also the Anglo-Saxon and the Continental countries) are showing a much more proactive approach to these issues and the Southern countries, a more passive one*. Examples of a proactive approach towards these issues are the *Network of European regions affected by demographic change*⁷ and/or the *Silver Economy Network of Regions*⁸. In both networks, most of the Regions involved are in Scandinavian and Continental countries, while Southern countries are only lately starting to adopt proactive approaches in relation to demographic change.

Proactive approaches are, for example, recognising that an active professional and social life for the elderly extends their expected independent lifetime without disability and contributes to national social policy reducing the demand for social and medical services. Proactive approaches also include recognising the importance of qualitative aspects of daily life, developing services which improve the work-life balance, such as childcare and care for elderly; and the renewal of urban and local areas and the regeneration of rural ones.

⁷ The Network of European Regions affected by demographic change regards the issue of demographic change as a regional challenge and considers that this issue could be better tackled through a structured dialogue with the Commission and the European Parliament.

⁸ The Silver Economy Network of Regions is a joint initiative of European regions initiated by the region of North Rhine-Westphalia (Germany) regarding ageing not as a threat but rather as a challenge and an opportunity for regional economic growth and for improving Europe's competitiveness. To realise this, the Silver Economy Network of European Regions (SEN@ER) has been established as a European-wide network of regions to promote the development and marketing of innovative products and services aimed at this new market segment, thereby contributing to regional development and job creation.

Policy thinking about these issues emerged explicitly just around the last period of the Community programming period 2000-2006, while in the Operational Programmes written in 1999 there were not explicit references to demographic change. Thus, specific national and regional strategies on these issues are only beginning to be developed.

At national level, the main issue has been since then *much more concentrated on demographic ageing*, recognised as an important challenge for development policies across the European Union.

Policy makers and demographers are increasingly looking at the effects of population ageing across a wide policy spectrum identifying both opportunities and challenges. For some authors (Rowthorn, 2004) the negative consequences of demographic change can be avoided if incentives for more efficient utilisation of existing resources are introduced. This includes older people who are capable of working, and might do so if there were suitable jobs available, but who are currently on sickness benefits or prematurely retired. It can also refer⁹ to the informal contribution older people can make to a region's economic and social cohesion, for instance as carers or babysitters as consumers and as politically and socially active citizens (Burniaux, Duval, Jaumotte, 2004).

In the 2004 review of the Lisbon Strategy¹⁰, population ageing is underlined as one of the three main challenges facing the EU economy and the Member States are recommended to develop a "comprehensive active ageing strategy by 2006".

Among countries, different are the policies for older people and migrants for instance. In any case, the consequences of demographic changes on labour markets and national pension system are among the main issues discussed especially at a national level (Casey et al., 2003).

A second area of potential policy responses to demographic changes involves social inclusion and equality issues considering that income inequality and poverty rates will increase over the next 25 years. Many Member States have already started to programme policy responses on these issues recognising the diversity of the wealth conditions and inclusion of older people, women and migrants.

International migration policies and international migration patterns are another sensitive issue, which is almost certain to change in response to population ageing and population decline in Europe. At the same time, it is not certain that increased immigration constitutes a policy response to improve the consequences of very low fertility compared to (1) population growth, (2) working-age population growth and (3) changes in the support ratio¹¹. The United Nations in their 2000 report on replacement migration concluded that the potential of immigration to

⁹ As is the case of the considerations from the Silver Economy Network of Regions.

¹⁰ European Commission, *Facing the challenge. The Lisbon strategy for growth and employment. Report from the High Level Group chaired by Wim Kok*, November 2004. Accessed at: <http://Europa.eu.int/grwthandjobs/pdf/2004-1866-EN-complete.pdf>.

¹¹ The support ratio is the number of people age 15-64 per one older person aged 65 or older. This ratio describes the burden placed on the working population (unemployment and children are not considered in this measure) by the non-working elderly population.

substitute for domestic births is rather limited. Replacement migration refers to the international migration that would be needed to offset declines in the size of population, the declines in the population of working age, as well as to offset the overall ageing of a population. A key finding of the UN report is that if retirement ages remain essentially the same as today, increasing the size of the working-age population through international migration is the only short- to medium-term option to reduce declines in the support ratio. However, such a policy would not reverse the process of ageing.

As previously stated, different policy approaches to demographic changes involving different aspects such as ageing and female reproductive behaviour can be identified across Member States.

With specific regard to *demographic ageing*, policy makers of the Baltic and Central European countries (that show a relatively young but rapidly ageing population), for example, generally perceive ageing as important. Nevertheless, it can be said that the policy consequences of demographic trends have been overshadowed by other issues such as restructuring of national economies in the post-communist period and relatively high levels of unemployment.

In Anglo-Saxon countries, since the end of the 1990s, efforts have been made to develop an integrated policy approach to demographic issues, again with a particular attention to active ageing. The focus has been on creating a policy framework to facilitate a more positive approach to older workers on a voluntary basis. In the UK, for example, a recent government strategy paper, *Opportunity Age: Meeting the challenges of ageing in the 21st century*¹², represents the Government's strategy for an ageing society. The strategy aims to end the perception of older people as dependent; ensure that longer life is healthy and fulfilling; and that older people are full participants in society.

In Southern countries, policy responses to demographic ageing have mainly focused on the provision of services, increasing the independence of older people and weakening incentives for early retirement. Moreover, instead of comprehensive national documents, ageing-related policies are parts of broader welfare and social inclusion strategies. In the few documents where central governments refer to active ageing policies, EU Structural Funds (especially ESF) are always considered as the main source of funding, with very few references to other domestic resources. Thus, in most Southern countries, the development of regional-level ageing strategies is limited, a consequence of the fragmented approach to the ageing issue and the dominance of the national level in labour market and pension policies.

Scandinavian countries are commonly regarded to be at the forefront in the definition and implementation of ageing policies. One explanation for this is that the challenges presented by

¹² UK Department for Work and Pension, *Opportunity Age: Meeting the challenges of ageing in the 21st century*, 2005. Coordinated and led by the DWP Secretary of State, in his role as Champion for Older People, the strategy focuses on three key areas: (1) work and income - to achieve higher employment rates overall and greater flexibility for over 50s in continuing careers, managing any health conditions and combining work with family (and other) commitments; (2) active ageing - to enable older people to play a full and active role in society; (3) services - to allow people to keep independence and control over their lives as growing older. It also sets out what steps Government, at national and local level, must do in order to organise ourselves to deliver the strategy.

demographic ageing have been felt earlier here than in other European countries. As a result, comprehensive initiatives to address the challenge of demographic ageing are being planned or are in operation across the Scandinavian countries, driven by labour market considerations.

Continental Western European countries (Austria, Belgium, Germany, France, Luxembourg and the Netherlands) are also facing demographic ageing, but they present a heterogeneous demographic picture.

Reforms to social insurance systems have dominated ageing policy agendas in many of these countries. Government efforts concentrated on addressing the culture of early retirement. Representatives of older people have been involved in the corporatist debates on pension reforms, particularly through trade unions. However, raising the profile of broader policies on ageing in the national policy agenda has been more of a challenge. The Dutch government's perception of the ageing issue, for example, has broadened. At the end of 2004, the Dutch government presented a broad vision on the policy implications of the ageing population up to the year 2030. Though at an early stage, this reflects increasing efforts to integrate policy responses to ageing pressures at the national level. In addition, in the second half of 2004, the Dutch presidency of the European Council adopted, as one of its main priorities, the building of strategies for healthcare in the light of population ageing.

Generally speaking, until recently, *regional-level responses* to demographic ageing have been piecemeal. The situation is changing, however. More advanced conceptualisations of ageing and the challenges and opportunities these offer beyond the fields of pensions and welfare, mean that ageing can no longer be regarded solely as a concern of national governments. The progressive regionalisation of policy responsibilities in many EU countries has given regional-level bodies a political mandate, institutional power and financial resources to initiate and/or deliver regional strategies. In addition, as noted above, there is an increasing awareness of sub-national differences in the impact of ageing and a more sophisticated understanding of the need for multi-stranded and multi-level responses.

In terms of *female reproductive behaviour*, the central question is the assumption that women either limit their fertility to accommodate their labour force activity, or they adjust their labour force behaviour to their fertility¹³. The evidence suggests that women do both. A substantial body of individual-level research describes the various strategies by which women in industrialised settings accommodate their employment patterns to their fertility and their fertility to their labour force participation. The evidence also suggests that these strategies vary across national settings and that the ability to combine labour force participation and motherhood varies across countries (Brewster and R.R. Rindfuss, 2000). For example, in Italy low labour market participation rates of married women are observed together with low birth rates. The proposed explanation for this apparent anomaly involves the Italian institutional structure, particularly as reflected in rigidities in the labour market, the lack of part-time job opportunities and the characteristics of the public-funded child care system. These rigidities

¹³ On this point, see also paragraph 1.2.7.

tend to simultaneously increase the costs of having children and to discourage the labour market participation of married women (Del Boca, 2003).

It is clear that all the policy actions aimed to reconcile a working career with family responsibilities through the provision of care facilities or to increase flexibility at workplace should be further pursued.

A study conducted by Eurostat¹⁴ shows that, within the European Member States, participation in employment and the amount of time worked by women aged between 20 and 49 are closely linked to the number and age of their children¹⁵. The same study by Eurostat, shows that part-time work occurs more often in the case of women with children (on average for EU-25, it is 38% of total employment, compared with 20% for women without children). The percentage of women in part-time work increases overall with the number of children, which is not the case for men¹⁶.

In attempting to raise birth rates, governments are thus *increasingly seeking to address the underlying causes of low fertility and adopt policies, programs and incentives to encourage couples, in particular women, to increase their child bearing*. Maternity and paternity leaves, childcare services, after school programs, part-time employment, job security, cash allowances and other financial incentives are among the measures adopted or being carefully reviewed by governments.

Generally speaking, family policies have recently moved anew to the centre of European policies, when the 2002 EU summit in Barcelona passed a recommendation that by 2010 member states should provide childcare to at least 33% of children under the age of three and to at least 90% of children between the ages of three and compulsory school age. Only a few years earlier the EU endorsed a directive that required member states to implement a minimal standard of parental leave in their national legislation¹⁷. In both cases the purpose of the move was to raise female labour-force participation rates in EU member states by facilitating the reconciliation of family and work life.

Although the work-life “balance” is an EU policy priority, within Europe there are considerable variations in the nature and extent of supports that national governments have offered to dual-

¹⁴ Eurostat (2005), “Gender gaps in the reconciliation between work and family life”, *Statistics in focus*, n.4/2005.

¹⁵ The employment rate for women aged 20-49 tends to be lower when they have children under twelve compared with when they do not (on average for EU-25, it is 60% versus 75%). In particular, in almost all the Member States, the employment rate for women declines as the number of children under 12 increases. By contrast, the employment rate for women increases as the age of children increases. In EU-25, the employment rate of women aged 20-49 whose youngest child is aged 0-2 is 52%, growing to 60% when the youngest child is aged 3-5 and to 67% when the youngest child is aged 6-11. According to 2003 LFS data, the employment rates for women with children tend to be higher in Slovenia, Denmark, Lithuania and Portugal, followed by Austria, Finland, Cyprus and the Netherlands; whereas the employment rates are lower in Malta, Italy, Hungary, Spain, Greece and the Czech Republic.

¹⁶ In EU-25, the figures for part-time work range from 33% for women with one child under 12 to 44% for those with two children and 51% for those with three or more children. However, these figures hide divergences among European countries. Specifically, part-time work for women seems to be particularly common from the first child in the Netherlands, Germany, the United Kingdom, Austria and Luxembourg, and more common from the second child in France.

¹⁷ Council Directive 96/34/EC of 3 June 1996 on the framework agreement on parental leave concluded by UNICE, CEEP and ETUC (OJL 145, June 19, 1996, 4-9).

earner families. In general, the Nordic welfare states offer the highest level of supports, although other countries, such as France, have a long standing tradition of extensive childcare supports to working mothers.

However, it should be remembered that some countries with few supports for employed parents – notably Anglo-Saxon Countries – also have high levels of employment amongst women. The level of women's employment in individual nation states is not only a reflection of the availability of state-provided extra family support for caring, but also of wider economic and labour market policies that will include tax systems, employment protections and regulation, etc. With the election of the "New Labour" government in 1997, for the first time in British history, family policy was placed at the centre of the political agenda (Lewis, 2001). A major governmental objective was and is the reduction of child poverty. This was to be largely achieved through an increase in parental employment, and social inclusion has been defined in terms of access to paid work. Cash transfers to low-paid working parents (Working Families Tax Credit) have been introduced, and these include allowances for childcare costs. The topic of "work-life balance" has been placed on the political agenda (DTI, 2000; 2003). However, to date, the government has contributed little to direct assistance with childcare, and the growth in childcare places has largely taken place in the private sector. In addition, the government has also relied on exhortation rather than legislation in persuading employers to adopt "family-friendly" employment policies.

While different welfare regimes embrace very different philosophies and fertility-related welfare policies, the different regimes are only weakly associated with differential fertility levels in Europe: the Scandinavian Nordic countries with their universalistic welfare regimes tend to have relatively high fertility rates, while the Southern European welfare regime is associated with lowest-low fertility rates. The Anglo-Saxon welfare regime is associated with a moderately high fertility, while the Conservative welfare regimes comprise a wide spectrum of fertility levels. The largest pressures to respond with policy changes to low and lowest-low fertility currently exist in the Conservative and Southern European welfare regimes.

Nevertheless, family policies can be classified as follows (Grant et al. 2004): (a) preventive policies, aimed at affecting the demographic behaviours that are believed to lead to adverse outcomes; these preventive policies can be indirect, such as economic policies, gender policies and education policies, or direct, such as migration policy, family support, reproductive health policy and family-friendly employment policies; and (b) ameliorative policies aimed at accommodating or ameliorating the consequences of low fertility, population decline and population ageing, including for instance social security reform, labour force policy, health care policy or policies towards the elderly.

1.3.2 The potential role of ERDF in supporting gender equality and adaptation to demographic change

As seen throughout the chapter, gender equality and demographic change are long run phenomena, deriving from changes in individual and household behaviours which can be *affected by interventions such as those supported by the ERDF* in the medium-long run. Moreover, as discussed previously, they are strongly influenced by the country and regional socio-economic and cultural context and by national and regional intervention strategies.

Major findings from the literature review¹⁸ show that better results are achieved upstream in the policy process (context analysis, definition of the overall strategy), rather than downstream at the implementing stages (involving relevant expertise and representative organisations, monitoring, evaluation etc.) especially in the case of demographic changes that were not considered as a priority during the programming period 2000-2006. Nevertheless, the overall impression is that much has been done over the 2000-2006 period to set the necessary conditions for successful gender mainstreaming - in particular acknowledging the legitimacy of the gender mainstreaming strategy - and to face demographic challenges. For example, ERDF supported gender equality through measures aimed at female entrepreneurship and social (service) infrastructures that may increase and develop the reconciliation of family and working life. Regarding demographic challenges, ERDF has supported infrastructures in the framework of active ageing policies, education infrastructures, infrastructures for the provisions of key social services, specifically care services for elderly. It also contributed to both mitigating and enhancing demographic changes addressing, for example, the planning and delivery of transportation systems, the renewal of urban and local areas, the valorisation of tourism and rural areas.

The mid-term evaluations have shown that the European Cohesion Policy has supported many of these aspects concentrating its action on three main categories of intervention: 1) infrastructure (including transport and the environment); 2) productive investment (including SMEs and RTD and innovation); and 3) human resources. The first two categories have been co-financed by the ERDF, while the third mainly by the ESF (European Commission, 2007). According to the mid-term evaluations of the Cohesion Policy, while Objective 1 regions and new Member States have tended to focus on infrastructures (especially transport) and human resources, Objective 2 regions have focussed more on aid to SMEs and RTD.

According to a broader literature review, these three areas of intervention, even if not directly linked to the demographic change and gender equality issues, could help address the demographic and gender challenges previously described.

Expanding and improving transport infrastructure may increase population mobility and reduce the isolation of rural and peripheral areas, where a large part of the elderly live. If the specific needs of older people, the disabled, women and rural/peripheral relative to urban/congested areas are considered, these measures may greatly improve their living condition and help

¹⁸ For a detailed synthesis of literature review used for this chapter, see the Grids included in the Annex to this Report.

adapting to demographic change. Relevant indicators of achievements and results would be the kind and the quality of transport infrastructure in relation to accessibility by old and disabled people and by women with infants, safety and security aspects (for example with public lighting at bus stops), the timing of public transportation systems, the geographical areas involved, etc.

Expanding and improving social infrastructures is directly related to the issues of gender equality and adaptation to demographic change. The mid term evaluation (European Commission, 2004) show that several Obj.2 programmes did not incorporate a specific social inclusion focus, which was usually handled through Obj.3 national programmes. However, as underlined before, some Community development programmes have included locally based projects, providing childcare and health care facilities, crime prevention measures, the improvement of urban neighbourhoods in decay. The integration with ESF programmes seems particularly relevant for the performance of these measures, as shown by the evaluation of the Meyerside Obj.1 in the UK and by the Obj.2 programme in Catalonia, Spain. Other examples of intervention are those implemented by the Swedish Vastra Obj.2 programme aimed at equal opportunities and the integration of immigrants, as are those implemented in France and in Finland. However, the mid-term evaluation summarised by the DG Regio (European Commission, 2004) shows that most programmes registered implementation difficulties and delays, the difficulties of involving local actors and the third sector organisations, and the lack of appropriate monitoring and evaluation indicators.

Support to (Research and Development (R&D) investments and innovation is another area of ERDF intervention which could have relevant effects on gender equality and on the adaptation to demographic changes. On the one hand, greater attention could be given to women's involvement in R&D and to reducing gender segregation in education and research; on the other hand, research projects could support innovation in sectors and products helping to cope with demographic change, such as the "health care technology cluster" (European Union, 2007).

Intervention in *SMEs and entrepreneurship* could directly improve women employment and support the adaptation to demographic change by addressing the specific needs of women entrepreneurs and other disadvantaged groups, such as senior workers and migrants. In addition, support to investments and SMEs in the care, health and social sectors could improve the living conditions of the elderly and other disadvantaged groups (such as the immigrants, the disabled, etc.) and contribute to the women work-life balance.

Improving *environmental sustainability* has been mainly dealing with problems related to inadequate water supply, waste water treatment and waste in general, reducing the gap in the standard of environmental infrastructure between Obj.1 regions and others. Future demographic changes are a relevant issue to be considered in future infrastructure projects, in order to cope with population decrease (such as in Eastern Germany regions) and/or urban-rural migration trends (as in Portuguese and Spanish regions) (European Commission, 2007). In addition the issues of accessibility and of awareness rising may have a relevant gender

dimension, considering the child rearing role of women and their potential impact on the awareness raising among future generations.

Table 1.8 presents some examples of typologies of relevant ERDF interventions for gender equality and demographic change. They are taken from the literature and sources of information regarding past programming periods. One of the aims of the case studies (Task 2 of this evaluation) will be also to check if the typologies of interventions that produced the most effective results and impacts are still the same or whether in more recent years a shift in the typologies of interventions occurred.

Table 1.8: ERDF areas of intervention and demographic change, gender equality issues

ERDF areas of interventions	Issues addressed	Examples of intervention from the literature review
Financing care infrastructures for children and the elderly	<p>Reconciling of family and working life</p> <p>Ageing population</p>	<p>The provision of childcare facilities is a relevant area of intervention and of co-operation between the Funds in comparison with the previous programming period, for instance in Ireland, Greece and Italy, where childcare services are supported by both the ESF and the ERDF.</p> <p>An example is the Women’s Community Projects Association’s services and activities for working mothers, single-parent families and immigrant women in rural <i>Ireland</i>. Co-funded by the ERDF, its childcare facility starts to give a solution to the growing demand for after-school childcare places.</p> <p>Another example is the ERDF co-financed project in the <i>Land of Salzburg (Austria)</i>, aiming at increasing the level of employment among women in remote rural areas by the provision of childcare facilities. New childcare schemes have been developed in cooperation with local SMEs. At present three company nurseries are serving as a model for a better reconciliation of work and family responsibilities for women.</p> <p>Advanced Care Technology Project in <i>Sheffield (UK)</i> to support innovative partnerships among enterprises, universities and research centres, regional health care institutions to develop new healthcare technologies for older people.</p>
<p>Support (incentives, business services, etc.) to (female) enterprises</p> <p>Creation of business incubators</p>	Female employment and entrepreneurship	<p>The ERDF, through the INTERREG Community Initiative, has financed and implemented several projects dealing with female entrepreneurship creating business incubators and Resource Centres for women that want to start a business.</p> <p>In the <i>Land of Salzburg (Austria)</i>, ERDF supported companies implementing a career development plan for women employees. Another group of actions concerns the area of innovation and information society, including initiatives to promote involvement in innovation and R&D by women, or incorporate a gender perspective into the support for development and management of science parks, innovation centres, technology and new media centres.</p> <p>The Obj. 1 Programme for <i>East Finland</i> with the measure "Developing the structures of everyday life" aimed at developing new kinds of participation and innovative service structures and activities, creating new jobs for women. Integrating IT into everyday life enhances women's interest in technology and improves market</p>

ERDF areas of interventions	Issues addressed	Examples of intervention from the literature review
		<p>demand for women's skills in the IT-sector.</p> <p>Similarly, the <i>Italian Objective 1 Programme for Mezzogiorno</i> intended, within the promotion of centres of competence, to encourage women entrepreneurs in the field of environmental protection, the field of tourism and of valorisation of cultural heritage.</p> <p>In <i>Sweden</i>, ERDF co-financed four programmes to increase awareness of equality between men and women, addressing a number of key issues such as: the female demographic challenge; gender equality at work; combating harassment and discrimination.</p> <p>In <i>France</i>, an association of urban women, with support from many partners, created a multi-cultural restaurant, combining economic, social and cultural objectives. The housing authority provided the space rent-free for three years, and ERDF, local and national funding were used to convert the apartment. The ESF supported the training of some of the staff, ethnic-minority women on minimum income support.</p>
Financing transport infrastructures, ICT, cross-border commuting	Demographic imbalances within regions Migration flows	<p>A number of projects aim to promote increased mobility for women through improved knowledge of the regulatory framework and opportunities offered in the cross-border area.</p> <p>Other projects include community managed building design and estate management strategies, particularly focussing on gender, disability and age-related issues of mobility, access to services and security).</p> <p>Co-financed by the ERDF, the "<i>GenderAlp! Spatial Development for Women and Men</i>" project networked 12 towns and regions, which worked together (2005-2007) on issues linked to spatial development and public financing from the viewpoint of equal opportunities between men and women.</p> <p>Broadband expansion in the county of <i>Norrbotten (Obj.1 in Sweden)</i>, has enabled the remotest regions of Northern Sweden to access broadband, with innovative applications in: education, e-health, industrial research and engineering networking.</p>
Financing basic services for the rural economy and population	Depopulation and rural /peripheral regions	<p>Bad transport connections, the isolation from the city centres as well as the lack of easily-accessible services for old people are some of the principal issues which have to be faced by rural/peripheral areas. The <i>DESERVE project</i>, co-funded with the ERDF, supports the transferability of models of service delivery to remote and rural areas within the Northern Periphery INTERREG IIIB area.</p>

ERDF areas of interventions	Issues addressed	Examples of intervention from the literature review
Financing renovation and development of villages and protection and conservation of the rural heritage		<p>For example the <i>Scottish</i> project, which is located in the Cowal area of Argyll, aims to improve access to services for vulnerable people living in these areas.</p> <p>Another example has been the <i>Belgian</i> inter-county buses ensuring transport from rural areas to major shopping centres.</p> <p>The lack of educational institutions may imply the temporal or permanent displacement of young people to university centres. The ERDF co-financed a project <i>in Cornwall</i>, a rural and peripheral region in the south-western corner of the UK to reduce the annual exodus of young school leavers who could not pursue their preferred university subjects close to home. In addition, once they had graduated, very few returned to their hometown, which divided families and made it difficult for local businesses to rejuvenate their workforces. The Combined Universities in Cornwall (CUC) was established to tackle this loss of young, creative talent and to help the region to embrace the opportunities presented by the knowledge economy.</p>
Financing the renovation of urban declining areas	Urban declining areas	<p>To face the consequences of the abandon of the city centre in favour of the suburbs or neighbouring countryside in <i>Lepzig</i>, ERDF co-funded the “Owner-Occupier Programme”. The main aim was to make the city centre more competitive compared with the suburbs. The LOOP programme aimed at contrasting this kind of exodus through activities of marketing, network building, financial encouragement and group moderation. It also contributed to asset creation and in this way supported provision for old age.</p>
Financing infrastructures in the framework of active ageing policies (lifelong learning, health, ICT, tourism, transport services, etc.) Financing infrastructures in	Ageing population	<p>Multi-services cards for the elderly in <i>Scandinavia</i>.</p> <p>“A la carte public transport” project in the <i>Netherlands</i> co-financed with the ERDF. The lack of buses in the evenings and at weekends, suspension of certain lines and, for many inhabitants, a lack of public transport within the vicinity of their homes, as well as a greater need for public transport on account of the ageing population and an increase in the number of handicapped and ill people, made the Dutch authorities elaborate a national policy to provide a better match for the requirements of efficiency, availability and security in public transport. A flexible formula has been implemented which combines taxi-style service with traditional public transport.</p> <p>The problem of isolation can be also faced through the diffusion of ICT, since it substitutes some physical services. The ERDF co-financed a programme in <i>Sweden</i> to enable the northern regions to access broadband. The</p>

ERDF areas of interventions	Issues addressed	Examples of intervention from the literature review
<p>the framework of human capital enhancement</p> <p>Financing infrastructures to reduce the isolation of the elderly/disabled population</p>		<p>quality of infrastructures related to information and communication technologies (ICTs) is essential for such remote, sparsely populated regions. Investing in broadband internet promotes growth and local services. In this respect, the connection of northerly areas to information highways has already generated innovative applications in three specific areas:</p> <ul style="list-style-type: none"> - education: all the schools in the region are now connected and access to significant training facilities is guaranteed; - e-health: owing to the digital and audio-visual possibilities offered by broadband, remote solutions are tested for a whole range of therapeutic services, included the monitoring of the quality of healthcare in old people's homes; - industrial research and engineering networking.

Sources: Operational Programmes; W.IN D. Women in Development Catalogue of Best Practice; European Commission, 2002; European Union, 2007

2. Statistical analysis of the specific demographic and gender equality situation and trends in EU regions and selection of 20 regions where ERDF interventions were or could be relevant in addressing those issues (task 1.2)

This chapter presents the results of the statistical analysis on the gender equality and demographic situation in the EU regions undertaken to identify a group of 20 EU regions experiencing demographic change and gender equality issues and where the ERDF interventions were, or could be, relevant.

For the selection of the 20 regions, the following methodology was used:

1. identification of a set of demographic change and gender equality indicators;
2. descriptive analysis of the demographic and gender equality initial conditions and trends in EU regions according to the identified indicators;
3. ranking and clustering of the EU regions according to the identified indicators;
4. identification of criteria to select the 20 regions.

2.1 Identification of demographic change and gender equality indicators

The identification of the indicators considered both the most relevant demographic and gender equality indicators usually adopted in the literature and their availability at the regional level. The **regional focus** of the analysis limited the range of data to be used to the harmonised comparative data available in the EU regional database and to other European recognised source of information.

A **limited set of indicators covering demographic change and gender equality issues** has been considered. These indicators have been calculated for the initial and the final year of the programming period under evaluation.

The indicators considered to assess the **demographic change** are presented in table 2.1, with indication of the source of data, the territorial breakdown of information, the rationale for their selection and the reference year/s considered for their calculation¹⁹.

As **for the gender equality** indicators, the literature underlines the multidimensional character of equality (economic, social, political etc.). Due to the limited availability of data at the regional level and the operational difficulty in taking into account all these dimensions, emphasis was placed on three indicators which measure gender equality in relation to the labour market and to political representativeness²⁰. Table 2.2 presents the selected indicators specifying the source of data, the territorial breakdown of information, the motivation for their choice, and the reference year/s considered for their calculation.

The territorial unit of analysis is **the NUTS II level**, both for demographic change and gender equality indicators (**except for Germany, where the NUTS I level is considered**).

As a **by-product** of the Interim Report, a **dataset** containing the set of the calculated indicators is provided.

¹⁹ Unfortunately direct indicators for some of the most relevant dimensions of demographic change, such as life expectancy and migration flows, are not available at the regional level. Demographic change at the regional level may be however analysed considering, on the one hand, general demographic indicators which adequately account for the ageing process, the change in the population and fertility levels, and, on the other hand, indicators which measure the overall migratory process (interregional and international registered migration) on the basis of population net balances at the regional level.

²⁰ As shown by the gender equality literature, an important dimension of gender equality in economic conditions is measured by gender gaps in the labour market, while gender gaps in political representation are relevant in assessing gender empowerment and attention to gender equality issues in policy making.

Table 2.1: Selected indicators to assess the DEMOGRAPHIC SITUATION in the EU regions

Indicator	Source	Territorial unit	Rationale	Years of reference
Crude rate of population natural increase	EUROSTAT General & Regional statistics	Regional (NUTS II) (NUTS 1 for Germany)	<ul style="list-style-type: none"> • It is defined as the ratio between the natural population increase (number of live births – number of deaths) in one year and the average population in that year at the regional level, per 1000 inhabitants. • It accounts for the change in population only due to the natural dynamics, regardless of migration flows. • It is consistent with the specification of the ToR when considering the shrinking of population not mitigated by interregional and international migration. 	<ul style="list-style-type: none"> • EUROSTAT regional data provide information on births and deaths at the regional level and on the average population. • It is possible to measure the indicator with reference to the beginning of the programming period and to 2005.
Crude rate of net migration	EUROSTAT General & Regional statistics	Regional (NUTS II) (NUTS 1 for Germany)	<ul style="list-style-type: none"> • It is defined as the ratio of the net migration (the population change not attributable to births and deaths) to the average population in a given year, per 1000 inhabitants. • The indicator is given by the difference between the crude rate of population increase and the crude rate of natural population increase. • The statistics of net migration are therefore affected by all the statistical inaccuracies in the two component of this difference. • It provides a measure of the change in population due to population movement, meant as migratory interregional and international flows (this latter for the component officially registered in population movements). • It is consistent with the specification of the ToR when considering that the trends in the demographic change are mitigated by interregional and in international migration. 	<ul style="list-style-type: none"> • EUROSTAT regional data provide information on births and deaths at the regional level and on the total population. • It is possible to measure the indicator with reference to the beginning of the programming period and to 2005.
Total fertility rate	EUROSTAT Population and social conditions -	Regional (NUTS II)	<ul style="list-style-type: none"> • The indicator represents the average number of children that would be born alive from a woman during her lifetime if her childbearing years reflecting the fertility 	<ul style="list-style-type: none"> • ESPON (European observation network for territorial observation and cohesion) DATABASE provides the total fertility rate

Indicator	Source	Territorial unit	Rationale	Years of reference
	Regional data	(NUTS 1 for Germany)	<p>rates by the age of a given year.</p> <ul style="list-style-type: none"> • It can be considered as the completed fertility of a hypothetical cohort, computed by adding the fertility rates by age for women in a given year (the number of women at each age is assumed to be the same). • It is a standardized measure not affected by age structure and therefore it is particularly suitable for across-region comparisons. 	at the regional level (NUTS 2) updated to 1999.
Old age dependency ratio	EUROSTAT Population and social conditions - Regional data	Regional (NUTS II) (NUTS 1 for Germany)	<ul style="list-style-type: none"> • The indicator measures the ratio between the regional population aged over 65 and the population in working age (15-64). • It is a sound measure of the population ageing process, with special focus on the relation of ageing population with the active (working age) population. • It is consistent with the specification of the ToR when considering the ageing of population, eventually mitigated by migration, as one of the main consequences of demographic change in the EU regions. 	<ul style="list-style-type: none"> • EUROSTAT regional data provide information on population by age. • It is possible to measure the indicator with reference to the beginning of the programming period and to 2005.

Table 2.2 –Selected indicators to assess the Gender Equality in the EU regions

Indicator	Source	Territorial Unit	Rationale	Years of reference
Gender gap in employment rate	EUROSTAT Population and social conditions - Regional data	Regional (NUTS II) (NUTS 1 for Germany)	<ul style="list-style-type: none"> • It is defined as the difference between male and female employment rates. • Gender gap in employment rate represents a sound measure of gender equality as it accounts for women's integration in the labour market. • The literature, gender studies and EU policies use extensively this indicator as a benchmark to assess gender equality. • It is a sound indicator also because it varies across European countries and regions and it accounts for different patterns of female participation to active life and connected reproductive and family choices (literature shows that in recent years countries with higher level of female employment rate and lower gender gaps also show an increase in fertility rates). • It is consistent with the specifications of the ToR when considering the issue of gender equality with reference to the labour market. 	<ul style="list-style-type: none"> • EUROSTAT Labour Force Survey provides regional data on population by sex and age and employment by sex and age. • It is possible to measure the indicator with reference to the beginning and the end of the programming period.
Gender gap in unemployment rate	EUROSTAT Population and social conditions - Regional data	Regional (NUTS II) (NUTS 1 for Germany)	<ul style="list-style-type: none"> • It is defined as the difference between male and female un employment rates. • Gender gap in unemployment rate represents a sound measure of gender equality as it accounts for women's integration in the labour market with special focus on equality of job opportunities. • The literature, gender studies and EU policies use extensively this indicator as a benchmark to assess gender equality. • It is a sound indicator also because it varies across European countries and regions and it accounts for different gender equality structure of local labour markets. For instance, countries/regions that show similar female activity and employment rates can show very different gender gaps in unemployment rate since the opportunity to access a job are gender differentiated, in spite of similar female patterns of participation to labour market. • It is consistent with the ToR when considering the gender equality with reference to the labour market. 	<ul style="list-style-type: none"> • EUROSTAT Labour Force Survey provides regional data on population by sex and age and employment by sex and age. • It is possible to measure the indicator with reference to the beginning and the end of the programming period.
Share of women in regional assemblies	DG EMPLOYMENT Database Decision-	Regional	<ul style="list-style-type: none"> • The political participation of women is a general measure of gender equality and it is a well-known evidence that countries showing higher gender equilibrium in political participation also show higher gender equality in other domains. • In data provided, regional assembly is meant as the representative assembly of a region 	<ul style="list-style-type: none"> • Data available are collected in the period: 01/08/2007 – 31/10/2007

Indicator	Source	Territorial Unit	Rationale	Years of reference
	making in the political domain Regional assemblies		<p>(i.e. regional authority) and is either directly or indirectly elected by and composed of elected representatives of the popularly elected representatives of constituent local self-government authorities In the Decision-making database, the different terms used in each country – e.g. regional parliament, regional council and regional assembly - are all treated as being equivalent, irrespective of the degree of decision-making power in practice or implied by the name.</p> <ul style="list-style-type: none"> • It is consistent with the specification of the ToR when considering the general issue of gender equality. 	

2.2 Descriptive analysis of the demographic and gender equality situation and trends in EU regions according to the indicators identified

The **indicators** in tables 2.1 and 2.2 were calculated for all the EU regions in order to have a first overall picture of demographic change and gender equality conditions and trends across the EU regions. The indicators were calculated for years 2000 and 2006 for both EU 15 regions and new accession countries (when data available, or for the reference year indicated in table 2.1 and table 2.2). Annex IIa provides specification on some cases where missing or not harmonised data required alternative solutions to get regional figures.

Presented below are the results of the descriptive analysis based on the selected indicators mapping the situation across European regions and identifying those regions experiencing specific demographic change and gender equality issues. While this is not an exhaustive analysis, it is useful to identify regions where the demographic situation and gender equality issues are improving, worsening or have remained unchanged in the 2000-2006 period.

The review of the literature in chapter 1 has already highlighted common trends across EU regions as for demographic changes and gender equality and has also pointed out that the relevant differences in the country-specific conditions are often related to the differences in the architecture of welfare and social systems across Europe.

The analysis proposed in this section is not aimed at explaining differences among countries and regions, since this has been already developed by the literature review in chapter 1. Rather, the more descriptive approach of this section is focused on the identification of relevant regional cases for the ex post evaluation of ERDF interventions. To this purpose regions have been grouped on the basis of the different degrees of intensity in the identified indicators, individuating the regional cases diverging from national or macro-area patterns.

Some of the issues already discussed in the literature review will find further evidence, and some regional specificities will emerge in relation to the different indicators considered.

The analysis is complemented by Regional maps which present for each indicator, the regional situation relative to the EU-25 average. Annex IIb provides methodological details.

2.2.1 *Demographic change: the regional situation in year 2000 and trends 2000-2006*

A) The crude rate of natural increase

Considering **the situation at the beginning of the programming period, the lowest rates of natural increase** (significantly lower than the EU average and ranging from – 6.6 ‰ to -2.6 ‰²¹)

²¹ See Annex IIb for methodological details on the definition of low, high and null values for the indicator.

indicating a shrinking of the population due *only* to its natural dynamics are registered in several regions of **Eastern European countries** (Latvia, Hungary, Estonia, the Central Czech Regions of Praha and Stredn-Cechy, Lozkie in Poland); in the **Mediterranean countries** (several Italian Northern and Centre Regions; some Northern Spanish regions as Principado de Asturias, Galicia, Castilla y Leon; the Portuguese region of Alentejo; several Greek regions in the South –Western area as Peloponnisos. Ipeiros. Ionia Nisia, Sterea Ellada and in the East Aegean islands area as Voreio Aigaio) and in some **Continental countries** (especially Germany with the several following regions: Sachsen-Anhalt, Sachsen, Thüringen, Saarland, Brandenburg, Mecklenburg-Vorpommern; France with only Limousin). The **Swedish** regions of Mellersta Norrland and Norra Mellansverige also register very low rates of natural increase together with three region of the **UK** (Devon, Cornwall and Isles of Scilly and Dorset and Somerset).

On the contrary, the natural population dynamics showed in 2000 a **positive and significant rate** (significantly higher than the EU average and ranging from 3.6% to 9%²²) in some **Continental countries** (especially France with several regions represented: Haute-Normandie, Pays de la Loire, Picardie, Alsace, Nord - Pas-de-Calais, Rhone-Alpes, Ile de France, Franche-Comté; the Netherlands with the regions of Gelderland, Noord-Holland, Overijssel, Noord-Brabant, Utrecht, Flevoland and Zuid-Holland; the Luxembourg and the Austrian region of Vorarlberg) and the **Anglo-Saxon area** with special reference to the Irish Border, the Midlands and Western, Southern and Eastern regions but also the contiguous UK region of Northern Ireland, the urban areas of the Inner and Outer London, the Berkshire, Bucks and Oxfordshire region and the Bedfordshire, Hertfordshire region. In the **Nordic countries** only the Finnish regions of Pohjois-Suomi and Åland register a positive value of the indicator.

Some **Mediterranean** regions showed in 2000 a different situation from the one characterising the majority of Mediterranean regions: Provincia Autonoma Bolzano-Bozen in Italy, Região Autónoma dos Açores in Portugal, Canarias and the Region de Murcia in Spain, Cyprus registered indeed positive and significant rates of natural increase.

As **for regions where the rate of natural increase can be considered null** (i.e. with an indicator ranging from 0.5‰ to + 0.5‰), the majority belongs to the **Mediterranean area** (the Greek regions of Anatoliki Makedonia, Thraki and of Dytiki Makedonia; the Spanish regions of Pais Vasco, Extremadura, Castilla-la Mancha, Comunidad Foral de Navarra, the Italian regions of Lombardia, Sardegna, Lazio, Veneto and Basilicata). Also several regions in the **UK** (Lancashire, Tees Valley and Durham, East Yorkshire and Northern Lincolnshire, Derbyshire and Nottinghamshire, Herefordshire, Worcestershire and Warks, East Anglia, Shropshire and Staffordshire, South Yorkshire, East Wales and Cheshire) and some regions belonging to the **Continental** area show this kind of pattern (Kärnten in Austria, the provinces of Hainaut, West-Vlaanderen, Liège and Oost-Vlaanderen in Belgium, the regions of Hessen, Niedersachsen and Bayern in Germany, Poitou-Charentes and Bourgogne in France and). Conversely among **East**

²² Except for even very higher values registered in the overseas regions of Guadeloupe (FR), Reunion (FR) and Guyane (FR) and the Spanish border region of Ciudad Autonoma de Melilla (ES).

European regions only Lubelskie and Opolskie in Poland and the Stredné Slovensko Region in Slovenia register a null rate of natural increase. As for **Nordic** regions, the Finnish region of Länsi-Suomi is the only one evidencing a null figure for the indicator.

Regions with a **medium-high rate of natural increase** (where the indicator ranges from 0.7‰ to 3.5‰) are the most representative group accounting for 67 regions. It covers **Continental European** regions including some Austrian regions (Ober-Österreich, Salzburg, Tirol), several Belgian provinces (Antwerpen, Vlaams Brabant, Namur, Brabant Wallon, Limburg, Région de Bruxelles-Capitale), several French regions (Languedoc-Roussillon, Corse, Aquitaine, Midi-Pyrénées, Provence-Alpes-Cote d'Azur, Bretagne, Centre, Lorraine, Basse-Normandie, Champagne-Ardenne), some regions in the Netherlands (Limburg, Groningen, Zeeland, Drenthe, Friesland) but only one region in Germany (Baden-Württemberg). It also covers a **large area of the Mediterranean Europe** (the regions of Comunidad Valenciana, Cataluna, Illes Balears, Andalucia and Comunidad de Madrid in Spain; the regions of Attiki, Kentriki Makedonia, Kriti, Notio Aigaio in Greece; the regions of Calabria, Sicilia, Provincia Autonoma Trento, Puglia, Campania in Italy; the regions of Região Autónoma da Madeira and Lisboa in Portugal; and Malta). In the **Nordic countries** medium-high rate of natural increase are especially showed by Danish regions (Hovedstaden, Sjælland, Syddanmark, Midtjylland, Nordjylland) while in **Eastern Europe** it is especially Poland to show this pattern (Kujawsko-Pomorskie, Wielkopolskie, Lubuskie, Zachodniopomorskie, Malopolskie, Pomorskie, Podkarpackie, Warminsko-Mazurskie).

The **trend²³ from 2000 to 2006²⁴** shows that in a relatively short period of time some changes can take place: only 7% of the regions considered can be described as evidencing a stable pattern, while the relative majority (over 49%) registers a positive trend (that is, an increase in the crude rate of natural increase) while a very significant 44% registers a negative trend (a decrease in the crude rate of natural increase).

Considering those regions experiencing a **favourable trend**, the trends can be described as follows:

- regions showing a **positive value** of the indicator in 2000 and registering a **further increase** over 2000-2006 are mostly **French** (Ile de France, Centre, Lorraine, Franche-Comté, Pays de la Loire, Bretagne, Aquitaine, Midi-Pyrénées, Rhone-Alpes, Languedoc-Roussillon, Provence-Alpes-Cote d'Azur) and **Anglo-Saxons** (Greater Manchester, West Yorkshire, Leicestershire, Rutland and Northants, West Midlands, Essex, Inner London, Outer London, Berkshire, Bucks and Oxfordshire, Gloucestershire, Wiltshire and Bristol/Bath area in the UK and Border, Midlands and Western and Southern and Eastern in Ireland). A positive trend is also registered in some **Spanish** (Comunidad de Madrid, Cataluna, Comunidad Valenciana, Illes Balears, Andalucia, Region de Murcia) and **Greek regions** (Attiki, Notio Aigaio, Kriti). In the Northern Europe a positive trend is registered

²³ See Annex IIb for methodological details on the definition of the trends.

²⁴ As specified in Table 2.1, data on population refer to 2005.

in Sjælland and Nordjylland (**Denmark**), in Etelä-Suomi and Pohjois-Suomi (**Finland**) in Stockholm (**Sweden**) and in several **Belgian provinces** (Bruxelles-Capitale, Antwerpen, Vlaams Brabant, Brabant Wallon). **No Eastern European** country belongs to this group of regions with the exception of Wielkopolskie in Poland.

- Regions showing a **negative value** for the crude rate of natural increase in 2000 and registering a **decrease of its value** between 2000-2006, **thus indicating an improvement in the natural dynamics**, are to be found especially in the **Mediterranean regions of Italy** (Liguria, Friuli-Venezia Giulia, Toscana, Piemonte, Emilia-Romagna, Umbria, Marche), **Greece** (Voreio Aigaio, Peloponnisos, Ipeiros, Ionia Nisia, Sterea Ellada, Thessalia) and **Spain** (Principado de Asturias, Galicia, Aragon, Cantabria). This trend is also present in the **UK** (Devon, Dorset and Somerset, Lincolnshire, Cumbria, Northumberland, Tyne and Wear, Merseyside, Surrey, East and West Sussex), in the **Czech Republic** (Praha, Stredn-Cechy, Jihovýchod, Strední Morava, Jihozápad, Moravskoslezsko, Severovýchod, Severozápad) and in **Sweden** (Mellersta Norrland, Norra Mellansverige, Småland med öarna, Övre Norrland). More **isolated cases** involve instead **Continental Europe** with a **few regions in Germany** (Thüringen, Hamburg, Berlin) and **Austria** (Nieder-Österreich), **France** (Limousin) and in **Eastern Europe** with **Estonia, Latvia**, the **Hungarian regions** of Nyugat-Dunántúl and Közép-Magyarország, the **Polish** Mazowieckie and Bratislavský kraj in **Slovakia**.
- It is worth noting the trend of very few regions where the indicator **turned from a negative to a positive value from 2000 to 2006**. They are: Wien (Austria), Algarve (Portugal), La Rioja (Spain), Sydsverige and Östra Mellansverige (Sweden) and Auvergne (France). They are all regions where the indicator in 2000 was medium-low, to say that the trend has improved, with an increase of the indicator significant, even if not exceptional.

As for regions where the situation **worsened** in terms of natural dynamics, the trend registers:

- a group of regions that showed a **negative value** for the crude rate of natural increase in 2000 and where the indicator in 2006 is **even lower**. It covers several regions of the **Continental Europe** (Burgenland, Kärnten and Steiermark in **Austria**, the West-Vlaanderen in **Belgium**, Sachsen-Anhalt, Saarland, Brandenburg, Mecklenburg-Vorpommern, Bremen, Rheinland-Pfalz, Schleswig-Holstein, Nordrhein-Westfalen, Hessen, Niedersachsen in **Germany**). Several **Poland** and **Hungarian regions** (Łódzkie, Śląskie, Dolnośląskie, Świętokrzyskie, Lubelskie, Opolskie and Dél-Alföld, Dél-Dunántúl, Észak-Magyarország, Közép-Dunántúl, Észak-Alföld) and **Lithuania** in the Eastern European area and a significant number of Regions in the **UK** (Cornwall and Isles of Scilly, West Wales and The Valleys, South Western Scotland, Highlands and Islands, Eastern Scotland, East Yorkshire and Northern Lincolnshire) are also included. In the Mediterranean area some **Portuguese** and **Italian** Regions are involved (Alentejo, Centro and Molise, Abruzzo.) Isolated regional cases are present in **Slovenia** and **Slovakia**.

- A group of regions that showed a **positive value for the crude rate of natural increase** in 2000 and where its value has **diminished** from 2000 to 2006, even if **still positive**. It covers especially **the Netherlands** (Groningen, Zeeland, Drenthe, Friesland, Zuid-Holland, Gelderland, Noord-Holland, Overijssel, Noord-Brabant, Utrecht, Flevoland) and **Austria** (Oberösterreich, Salzburg, Tirol, Vorarlberg) and **Belgium** (Namur, Limburg and Luxembourg) together with **Cyprus** and **Malta** in the Southern Europe. The trend is quite country specific: several region of **Poland** are involved (Kujawsko-Pomorskie, Lubuskie, Zachodniopomorskie, Malopolskie, Pomorskie, Podkarpackie, Warminsko-Mazurskie) together with a significant part of **Portugal** (Norte, Lisboa and Região Autónoma da Madeira) and **Demark** (Hovedstaden, Syddanmark, Midtjylland). Some isolated regional cases are also present in the **UK** (Hampshire and Isle of Wight, Northern Ireland) and in **Slovakia** (Východné Slovensko).

From 2000 to 2006, the following regions instead registered a **negative trend of the indicator, which changed from a positive to a negative value**: Opolskie (Poland), Sardegna and Basilicata (Italia), Extremadura (Spain), Podlaskie (Poland), Bayern (germany), Dytiki Makedonia (Greece), Stredné Slovensko (Slovakia), Limburg (the Netherlands), Åland (Finland).

To complete the overall picture of the EU regions in terms of their natural population dynamics, the **stable regions** i.e. not registering a significant change of the indicator from 2000 to 2006, are:

- North Eastern Scotland, North Yorkshire and Shropshire and Staffordshire (**UK**), Dytiki Ellada (**Greece**), Valle d'Aosta (**Italy**), Hainaut (**Belgium**) where the negative crude rates of natural growth kept the same negative value;
- Liège (**Belgium**), Lazio (**Italy**), Cheshire and Kent (**UK**), Zahodna Slovenija (**Slovenia**) with slightly positive crude rates of natural growth;
- Bedfordshire, Hertfordshire (**UK**), Canarias and Ciudad Autonoma de Ceuta (**Spain**), Picardie, Alsace, Nord - Pas-de-Calais (**France**) with significantly positive crude rates of natural growth.

Figure 2.1a: Crude rate of natural increase, 2001

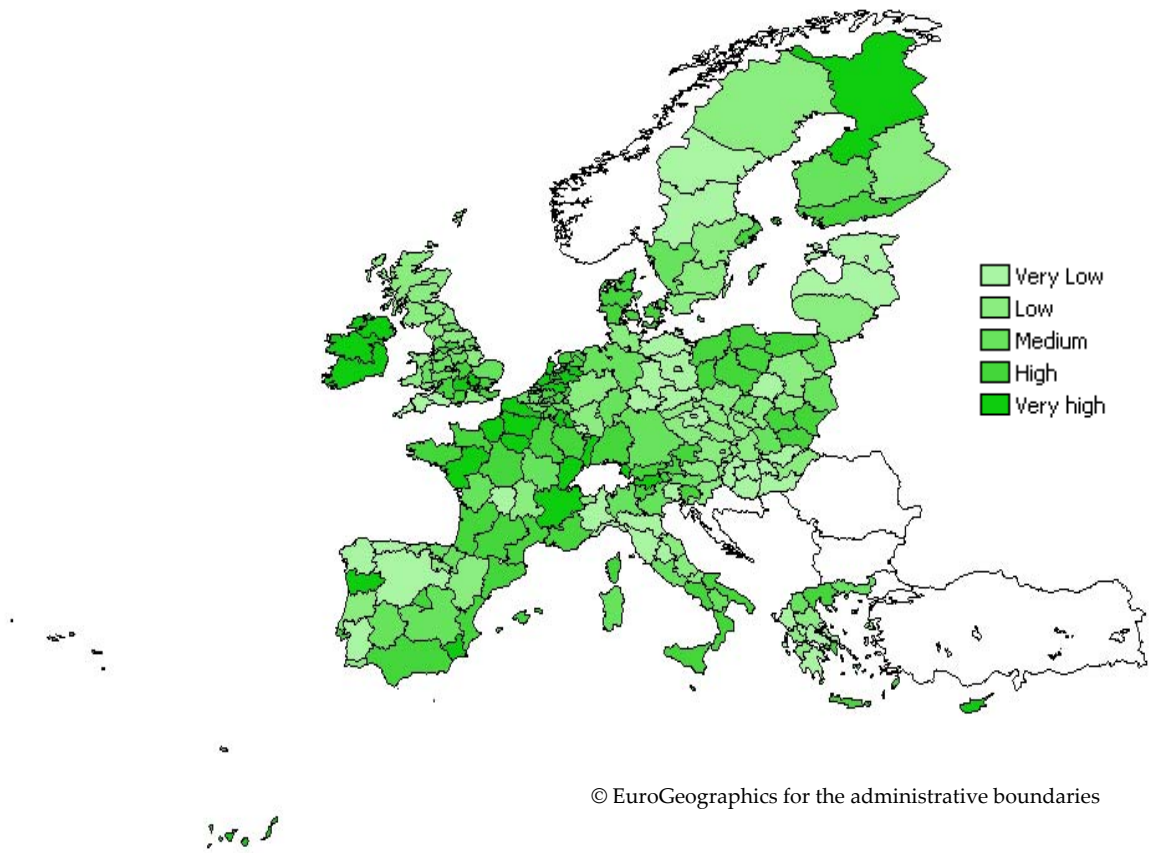
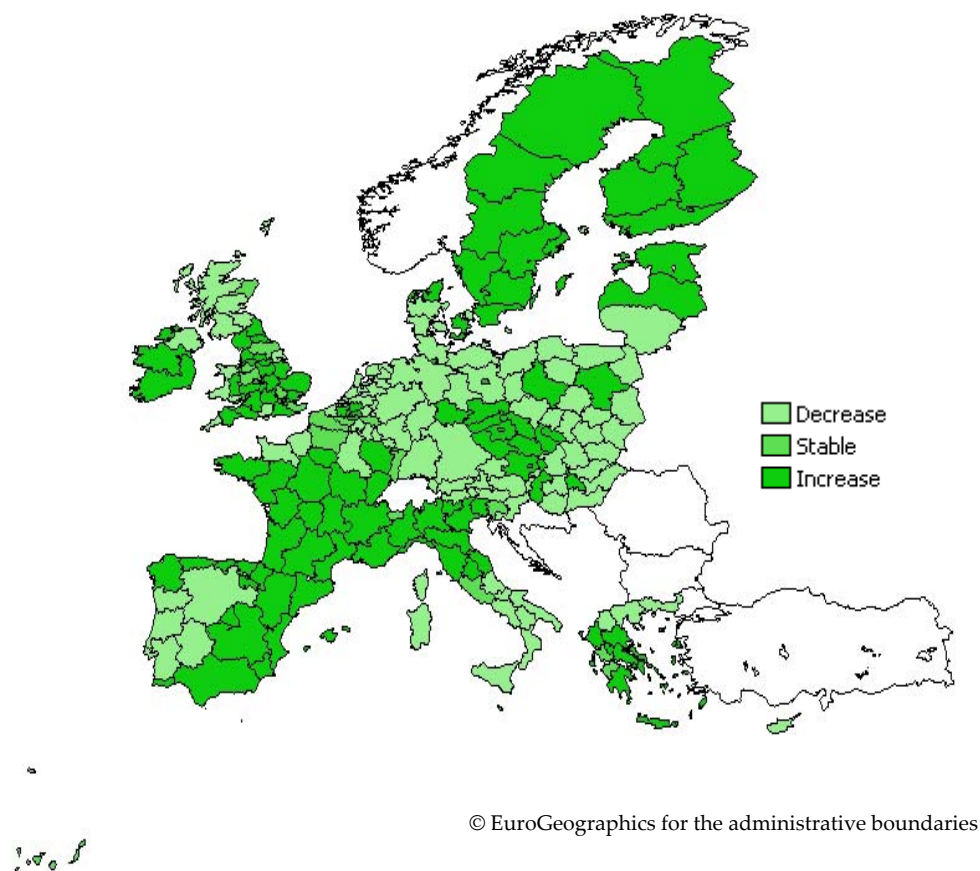


Figure 2.1b: Crude rate of natural increase, 2000-2006 trend



Source: Eurostat, General and Regional statistics.

B) The crude rate of net migration

The **migratory dynamics**, meant as the change in population due to population mobility, without distinguishing interregional and international flows, is taken into account by the **Crude rate of net migration**. This indicator shows a **significant variability across the EU regions**, as some regions (in the UK and in Slovakian Bratislavský Kraj) register a negative value of over 20‰ and some others in the Southern area (as Malta and the Spanish Canarias and Balears Islands) register instead positive values of comparable intensity.

The situation in **2000** can be described as follows²⁵:

- the regions showing the **lowest (negative) crude rate of net migration** are in the **UK**, in **Denmark** (Nordjylland, Sjælland, Syddanmark, Midtjylland, Hovedstaden) and in

²⁵ See Annex IIb for methodological details on the definition of low, high and null values for the indicator.

Germany (Sachsen-Anhalt). In these regions population inflows (wherever originating from) do not counterbalance population outflows (wherever migrating to).

- Regions showing a **quite low (negative) crude rates of net migration are present in several regions of the UK** (Devon, Leicestershire, Rutland and Northants, Essex, Hampshire and Isle of Wight, North Yorkshire, Cheshire, Inner London) and a **notable number of regions in Eastern European countries**. Outflows of population are not compensated by inflows in a large part of the **Polish territory** (Slaskie, Kujawsko-Pomorskie, Podkarpackie, Opolskie, Dolnoslaskie, Podlaskie, Lubuskie, Lubelskie, Warminsko-Mazurskie), in **Lithuania, Latvia, Slovakia**, in the **Czech regions** of Praha and Moravskoslezsko and in the **Hungarian** region of Közép-Magyarország. Also **some Mediterranean and Nordic European regions** are so characterized: Sardegna, Sicilia, Puglia, Campania, Calabria, Molise, Basilicata in **Southern Italy** (and also Sterea Ellada in Greece); Mellersta Norrland, Övre Norrland, Norra Mellansverige in **Sweden**, Åland, Itä-Suomi, Pohjois-Suomi in **Finland**. As for **Continental Europe**, the **French** Champagne-Ardenne, Nord Pas-de-Calais, Haute-Normandie, Picardie, Lorraine, Ile de France, the **German** Bremen, Sachsen, Mecklenburg-Vorpommern, Thüringen and the **Austrian** Kärnten, register this situation.
- **At the opposite, regions registering very significant (positive) crude rates of net migration are concentrated** on the one hand in **the Mediterranean area: in Northern Italy, in Central-Southern Portugal** (Centro, Alentejo, Algarve), in several **Spanish regions** (Comunidad Valenciana, Region de Murcia, Comunidad de Madrid, La Rioja, Cataluna, Galicia, Comunidad Foral de Navarra, Castilla-la Mancha, Andalucia, Illes Balears, Canarias) and in **Malta and Cyprus** (in this area the outcome is likely to be due to international migration, as also discussed in the literature review). On the other hand belong to this group some regions in **France** (Languedoc-Roussillon, Midi-Pyrénées, Corse, Aquitaine, Provence-Alpes-Cote d'Azur, Bretagne, Poitou-Charentes, Limousin), in the **UK** (Lincolnshire, Cornwall and Isles of Scilly, Highlands and Islands, North Eastern Scotland), in **Germany** (Hamburg, Bayern) and in isolated cases in **Sweden** (Stockholm) and in the **Czech Republic** (Stredn-Cechy).
- Population **inflows are higher than outflows in most of the European regions**. This is the case in the **remaining regions of Southern European countries** and in some regions in **Continental Europe**: Wien, Burgenland, Nieder-Österreich, Tirol, Vorarlberg, Ober-Österreich, Salzburg in **Austria**; **Belgium**; Rheinland-Pfalz, Nordrhein-Westfalen, Schleswig-Holstein, Baden-Württemberg, Saarland, Niedersachsen, Hessen, Brandenburg in **Germany**; Bourgogne, Franche-Comté, Centre, Alsace, Rhone-Alpes, Auvergne, Pays de la Loire, in **France**; Utrecht Noord-Holland, Overijssel, Noord-Brabant, Gelderland, Zuid-Holland, Groningen in **the Netherlands**. In Northern and Eastern Europe are involved Sydsverige, Småland Med Öarna, Östra Mellansverige, and Västsverige in **Sweden**, besides some **Polish and Hungarian regions**.
- **An equivalent dynamics** in terms of population inflows and outflows characterise a limited number of regions (around 20) that cover different countries (i.e. Berlin in Germany,

Estonia, Zahodna Slovenija in Slovenia) even though Eastern European regions are over-represented.

As for the **trends**²⁶ registered in **2000-2006**²⁷, over 60% of the EU regions register an increase in the crude rate of net migration, around 33% register a decrease and the remaining 7% can be considered as stable.

The more frequent situation is that of increasing inflows, independently from the initial situation.

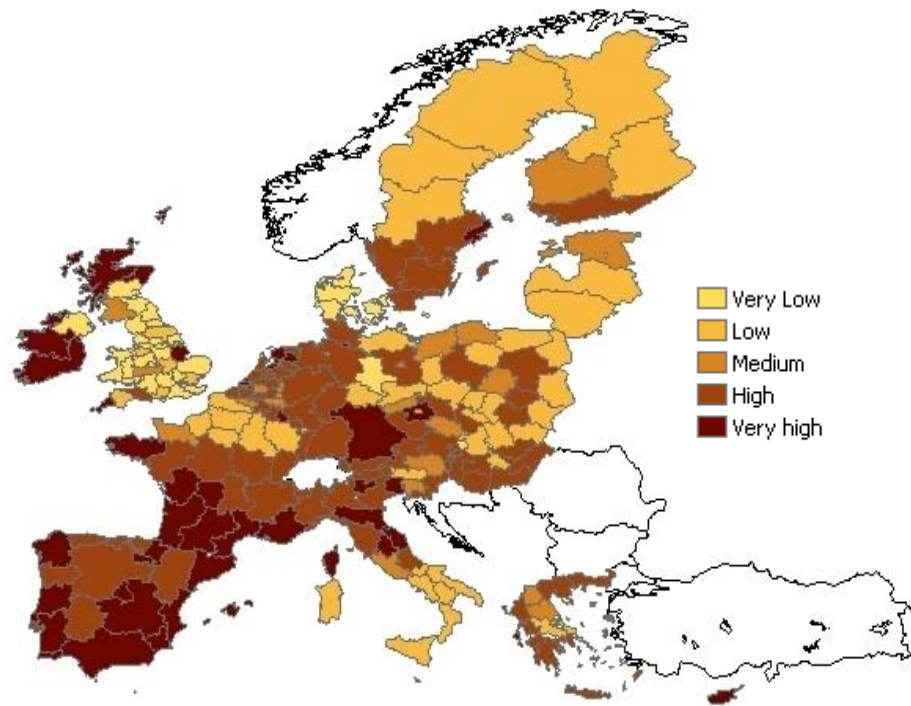
The most critical cases are:

- those regions with a **very low and decreasing crude rate of net migration**, which are likely to experience significant depopulation trends: Východné Slovensko (**Slovakia**); Lubuskie, Lubelskie, Warminsko-Mazurskie (**Poland**), Moravskoslezsko (**Czech Republic**), Thüringen (**Germany**);
- those regions with a **very high and increasing rate of net migration**, which are likely to experience significant immigration inflows: Emilia-Romagna, Umbria, Provincia Autonoma Trento, Marche in **Italy**; Comunidad Valenciana, Region de Murcia, Comunidad de Madrid, La Rioja, Cataluna, Comunidad Foral de Navarra, Castilla-la Mancha, Andalucia in **Spain**, **Cyprus** together with **Irish regions** (Border, Midlands and Western, Southern and Eastern) and the more isolated cases of Cornwall and Isles of Scilly (**UK**) and of StrednCechy (**Czech Republic**).

²⁶ See Annex IIb for methodological details on the definition of the trends.

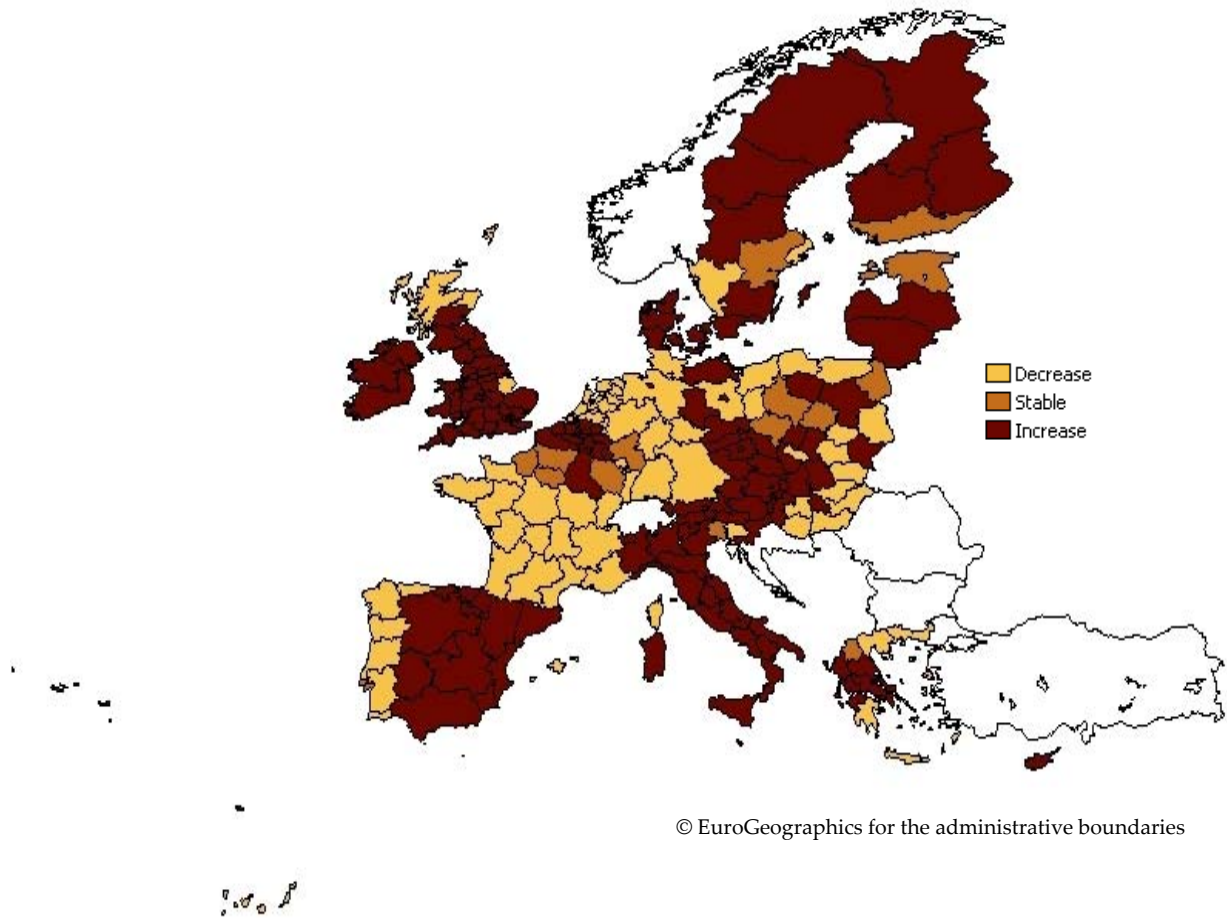
²⁷ As specified in Table 2.1, data on population refer to 2005.

Figure 2.2a: Crude rate net migration, 2000



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Figure 2.2b: Crude rate net migration, 2000-2006 trend



Source: Eurostat, General and Regional statistics.

C) The total fertility rate

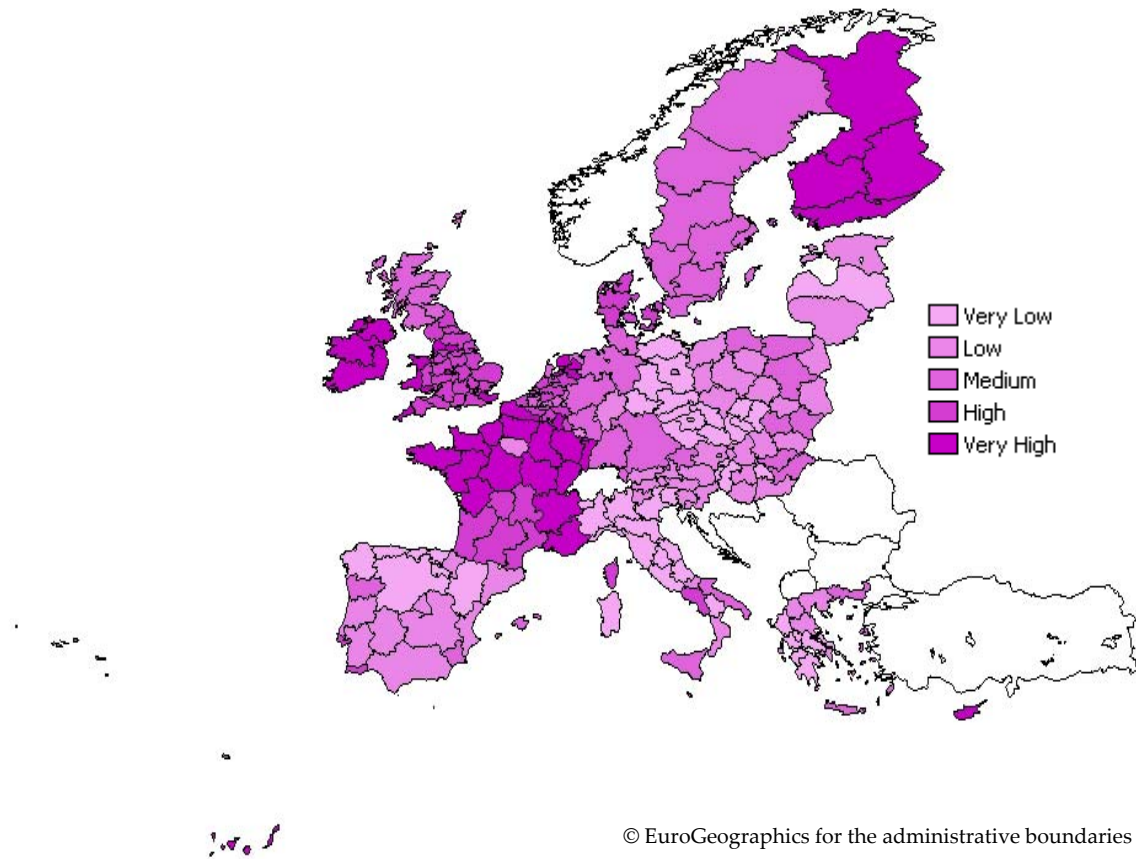
At the **beginning of the programming period 2000-2006**, the total fertility rate across European regions (ESPON data for 1999) ranged from the lowest 0.82 registered in the Spanish Principado of Asturias to the highest 2.04 registered in Finland (Pohjois-Suomi), evidencing, as pointed out by the literature review, that *all European regions are below the replacement fertility rate*.

Grouping EU regions according to the level of the total fertility rate²⁸, around the 58% of the regions considered has a medium, low or very low rate of fertility (that is anyway low in absolute terms).

²⁸ The total fertility rate has been classified as very low, low, medium, high, very high **indexing** the regional fertility rates by the average value of the rate. Where the value of the index ranges from 0.95 to 1.05 the rate is considered medium, where the value of the index is above the average value over (under) 1.05 (0.95) another average value has been calculated to distinguish between high and very high (low and very low) value of the index.

- Regions registering a **medium index of total fertility rate** are, on the one hand, **Continental regions in Germany** (Schleswig-Holstein, Rheinland-Pfalz, Nordrhein-Westfalen, Niedersachsen, Bayern, Baden-Württemberg) **Belgium** (Vlaams Brabant, Oost-Vlaanderen, Limburg) and **Austria** (Vorarlberg, Oberösterreich), on the other, a significant share of **Sweden regions** (Övre Norrland, Mellersta Norrland, Norra Mellansverige, Västsverige, Sydsverige, Småland med öarna, Östra Mellansverige, Stockholm) and some regions in the **UK** (Highlands and Islands, North Eastern Scotland, South Western Scotland, Eastern Scotland) and in **Poland** (Pomorskie, Warminko-Mazurskie, Podkarpackie, Malopolskie, Mazowieckie). Also some regions in **the Netherlands** (Limburg, Noord-Holland, Groningen), in **Greece** (Kriti, Notio Aigaiio, Voreio Aigaiio, Anatoliki Makedonia, Thraki) and in **Hungary** (Észak-Alföld, Észak-Magyarország) register a medium fertility rate. Other regional cases seem to be quite isolated in a country perspective (Norte region in Portugal, Sicilia e Puglia in **Italy**, Region de Murcia e Illes Balears in Spain).
- Regions where the **index of total fertility rate is very low** are geographically more concentrated. This includes the **Mediterranean area** (with the exception of Portugal) with several Italian, Spanish and Greek regions, and significant presence of **Eastern European regions**. In particular several **Czech** regions (Praha, Stredn-Cechy, Jihozápad, Severozápad, Severovýchod, Jihovýchod, Strední Morava, Moravskoslezsko), some **Polish** and **Hungarian** ones, but also **Latvia** and several **German regions**.
- Regions where the **index of total fertility rate is low**, still covers the **Mediterranean countries** (with also some regions in Portugal) but now includes a much more wider area of **Eastern Europe**: Slovakian, Slovenian regions, Polish and Hungarian regions and Estonia are covered together with several region of the **German** and **Austrian** Continental Europe (Hessen, Bremen, Saarland, Hamburg, Berlin, Salzburg, Nieder-Österreich, Tirol, Kärnten, Steiermark, Wien).
- The opposite situation is registered in **Northern and Western continental European regions**: very high indices of the total fertility rate are to be found in Finland, several French regions, in some Dutch regions (Flevoland, Drenthe, Friesland, Overijssel) and in some **Belgian ones** (Région de Bruxelles-Capitale, Provinve of Luxembourg) Also some **UK regions** belong to this group (Northern Ireland, West Midlands, West Yorkshire, Lancashire, Kent, Cornwall and Isles of Scilly, West Wales and The Valleys. Mediterranean regions covered by very high indices of the total fertility rate are only **Cyprus** and the Spanish autonomous border regions (Ceuta e Mellilla).
- A **medium high value of the index of the total fertility rate** involves instead the great majority of the **UK** regions, several **Dutch, Belgian** and **Danish** regions and a number of French ones. Also some **Portuguese regions** and **Malta** belong to this group.

Figure 2.3: Total fertility rate, 1999



Source: ESPON, Project 1.1.4, ITPS.

D) The old age dependency ratio

In 2000, 60% of the EU regions registered a share of the population over 65 on total population in active age (15-64)²⁹ above the EU average (around 24%), revealing that an old age structure of the population is a quite common feature of EU regions. The situation in 2000³⁰ can be described as follows;

- The regions with the **oldest population structure** belong mostly to the **Mediterranean area**: several **Italian** (Piemonte, Liguria, Friuli-Venezia Giulia, Toscana, Abruzzo, Marche, Molise, Umbria, Emilia-Romagna) and **Spanish** regions (Galicia, Principado de Asturias, Castilla y Leon, Extremadura, Aragon, La Rioja, Castilla-la Mancha) with some **Portuguese** (Algarve, Lisboa) and **Greek regions** (Sterea Ellada, Ipeiros, Peloponnisos, Ionia Nisia, Voreio Aigaio) registered the highest old age dependency ratios. A very old

²⁹ As specified in table 2.1 the old age dependency ratio measures the ratio between the regional population aged over 65 and the population in working age (15-64). This is why data here presented are different from the shares of population over 65 discussed in the section of the literature review. In the following, the reference to older/younger structures of population is always to be intended with reference to the population in working age.

³⁰ See Annex IIb for the definition of the different intensities of the old age dependency ratio.

population age structure is also present in **several French regions** (Corse, Bourgogne, Provence-Alpes-Cote d'Azur, Languedoc-Roussillon, Aquitaine, Midi-Pyrénées, Auvergne, Poitou-Charentes, Limousin), **Swedish regions** (Mellersta Norrland, Småland med öarna, Norra Mellansverige) and some **British ones** (Dorset and Somerset, Cornwall and Isles of Scilly, Devon).

- **Quite old structures of population** interest **the other regions of the Mediterranean countries** (Lazio, Lombardia, Basilicata, Valle d'Aosta, Veneto in Italy; Comunidad Foral de Navarra, Cantabria in Spain; Anatoliki Makedonia, Thraki, Thessalia, Dytiki Makedonia, Dytiki Ellada in Greece and the Norte region in Portugal) and a notable number of **British** (North Yorkshire, West Wales and The Valleys, Surrey, East and West Sussex, Merseyside, East Anglia, Lincolnshire, Derbyshire and Nottinghamshire, Cumbria, East Yorkshire and Northern Lincolnshire, Northumberland, Tyne and Wear, Herefordshire, Worcestershire and Warks, Essex, Kent) and **Swedish** regions (Övre Norrland, Östra Mellansverige, Sydsverige, Västsverige). **Also significant parts of the territories of Germany** (Sachsen, Saarland, Rheinland-Pfalz, Bremen), **France** (Basse-Normandie, Centre, Bretagne, Pays de la Loire) and **Belgium** (Prov. West-Vlaanderen, Prov. Oost-Vlaanderen, Prov. Vlaams Brabant, Prov. Antwerpen, Prov. Liège, Prov. Namur, Prov. Luxembourg, Prov. Hainaut, Région de Bruxelles-Capitale) registered quite an old age structure of population.
- Regions with **the youngest age structure of population** are instead several **Eastern European regions**. In particular the **Polish** (Opolskie, Slaskie, Zachodniopomorskie, Pomorskie, Warminsko-Mazurskie, Dolnoslaskie, Malopolskie, Podkarpackie, Kujawsko-Pomorskie, Lubuskie, Wielkopolskie), the **Slovakian regions** (Západné Slovensko, Východné Slovensko, Stredné Slovensko, Bratislavský kraj) and the **Czech** Moravskoslezsko and Severozápad. Also **Cyprus** and **Malta** belong to this group evidencing a peculiar feature in the Mediterranean area.
- In **Continental Europe** only Noord-Brabant, Utrecht and Flevoland in **the Netherlands**, Vorarlberg in **Austria** and Berkshire, Bucks and Oxfordshire and Inner London in the **UK** register a relatively young population.
- **Quite young population age structures** characterise several **Eastern European regions**: Swietokrzyskie, Podlaskie, Mazowieckie, Łódzkie, Lubelskie in **Poland**, Vzhodna Slovenija and Zahodna Slovenija in **Slovenia**, Latvia, Lithuania, Közép-Dunántúl, Dél-Dunántúl, Észak-Alföld, Nyugat-Dunántúl in **Hungary**, Střední Morava, Jihovýchod, Jihozápad, Severovýchod, Střední Čechy in the **Czech Republic**. Several regions in the **Continental and Northern Europe** also register such a structure: **several Dutch** (Limburg, Gelderland, Friesland, Overijssel, Noord-Holland, Zuid-Holland, Groningen), **French** (Nord - Pas-de-Calais, Haute-Normandie, Alsace, Picardie), **Austrian** (Tirol, Salzburg, Oberösterreich), **Danish** (Hovedstaden, Sjælland, Syddanmark, Midtjylland, Nordjylland) and **Finnish regions** (Pohjois-Suomi, Etelä-Suomi) belong to this group.
- It is worth noting those **few Mediterranean** regions showing a younger structure of population than the Mediterranean average: Sardegna and Campania in **Italy**; Attiki and Notio Aigaiio in **Greece**; Andalucia, Comunidad de Madrid, Region de Murcia, Illes

Balears in **Spain**. In **Portugal** a notable share of the territory is characterized by a quite young population age structure.

The **change**³¹ that took place in 2000-2005³² in the old age dependency ratio show that around 22% of the regions analysed registered in 2005 an old dependency ratio substantially equivalent to that registered in 2000³³. A stable old age dependency ratios is present both in regions that have an older age structure of the population and in regions having a younger population structure.

As for regions that underwent a **favourable trend**, that is regions where the old age dependency ratio decreased, the situation can be described as follows:

- A minor group of regions with a **relatively young age structure** of the population in year 2000 showed a **trend towards an even younger structure**. This group is composed by the **Czech regions** of Stredn-Cechy, the **Spanish** regions of Murcia and Illes Balears, the **Irish** region of Border, Midlands and Western, **Luxembourg**, the **Portuguese** Região Autónoma dos Açores, the **Slovakian** Stredné Slovensko and Bratislavský kraj and the regions of Inner London, Greater Manchester and Outer London in the **UK**.
- A limited group of regions with a **relatively old structure of the population in year 2000 showed a trend towards a younger structure**. This group is composed mainly by regions in **Continental Europe** (Prov. Hainaut and Région de Bruxelles-Capitale in **Belgium**; Centre, Midi-Pyrénées, Auvergne, Bretagne, Poitou-Charentes, Limousin, Pays de la Loire in **France**) and in the **Iberian area** (Algarve, Norte, Lisboa in **Portugal**; La Rioja and Castilla-la Mancha in **Spain**). Also some regions in the **UK** present this trend (Northumberland, Tyne and Wear, Herefordshire, Worcestershire and Warks, Essex, Kent, Devon). The isolated case of Västsverige in **Sweden** also belongs to this group.
- Another limited group of regions with a **relatively “balanced” structure of population** in year 2000 showed a **trend towards a younger structure**: Wien (**Austria**) and Praha (**Czech Republic**), Comunidad Valenciana (**Spain**), Rhone-Alpes and Champagne-Ardenne (**France**), Hampshire and Isle of Wight, Gloucestershire, Wiltshire and Bristol/Bath area, Cheshire, East Wales. South Yorkshire (**UK**).

As for regions that underwent a **worsening trend**, that is regions where the old age dependency ratio increased, the situation (covering a larger number of regions as a whole) can be described as follows:

- A large group of regions with a **relatively balanced age structure of the population** in year 2000 registered in **2005 an older structure**. They are around 30 regions, especially in **Continental Europe** (several German, Austrian and Dutch regions) and in **Southern**

³¹ See Annex 2B for the definition of the trends.

³² The most updated data for population by age at the regional level are for 2005. We underline that for some regions (especially Nordic ones) the trend is estimated since data for 2000 were not available (see annex 1 for detail).

³³ The intensity of the changes that took place between 2000 and 2005 has been assessed considering the **percentage variation of the old age dependency ratio in the two years considered**. A percentage variation ranged between -2% and +2% has been considered null. Percentage variations over (under) the threshold of + (-) 2% were classified in relation to the average variation: regions over the average were considered as showing a very significant change, those that were below were considered as showing a significant change.

Europe (some Italian and one Spanish region) with the presence of isolated cases from **Eastern Europe** (Észak-Magyarország and Dél-Alföld in Hungary, Estonia). Relevant are also the cases of **Finnish** regions (Åland, Länsi-Suomi) and of **British ones** (Lancashire, North Eastern Scotland, Highlands and Islands).

- A limited group of regions with a **relatively old structure of population** in year 2000 registered in 2005 an **even older structure**. They are **German** (Sachsen, Saarland, Rheinland-Pfalz, Bremenand) and **Greek** regions (Anatoliki Makedonia, Thraki, Thessalia) together with the isolated case in the Nordic area of the **Finnish** region of Itä-Suomi.
- A very large group of regions with a **relatively young population structure** in year 2000 registered a trend towards an **older structure**. This group covers mainly regions of **Continental** and **Eastern** Europe. Specifically, some regions in **Austria** (Tirol, Salzburg, Vorarlberg, Oberösterreich), **Germany** (Mecklenburg-Vorpommern, Brandenburg, Berlin), **France** (Nord - Pas-de-Calais, Haute-Normandie, Alsace, Ile de France, Picardie together with the overseas regions), the **Netherlands** (Limburg, Gelderland, Friesland, Overijssel, Noord-Brabant, Noord-Holland, Zuid-Holland, Groningen, Utrecht, Flevoland). Many regions in **Poland, Slovenia, Slovakia, Hungary, the Czech Republic, Latvia** and **Lithuania** are also in this group. Also **part of the UK** (Shropshire and Staffordshire, Bedfordshire, Hertfordshire, Leicestershire, Rutland and Northants, Tees Valley and Durham, West Yorkshire, Eastern Scotland, Berkshire, Bucks and Oxfordshire, Northern Ireland) and **some Southern regions** (Malta, Campania and Sardegna in Italy, Attiki and Notio Aigaio in Greece) are concerned.

Figure 2.4a: Old age dependency ratio, 2000

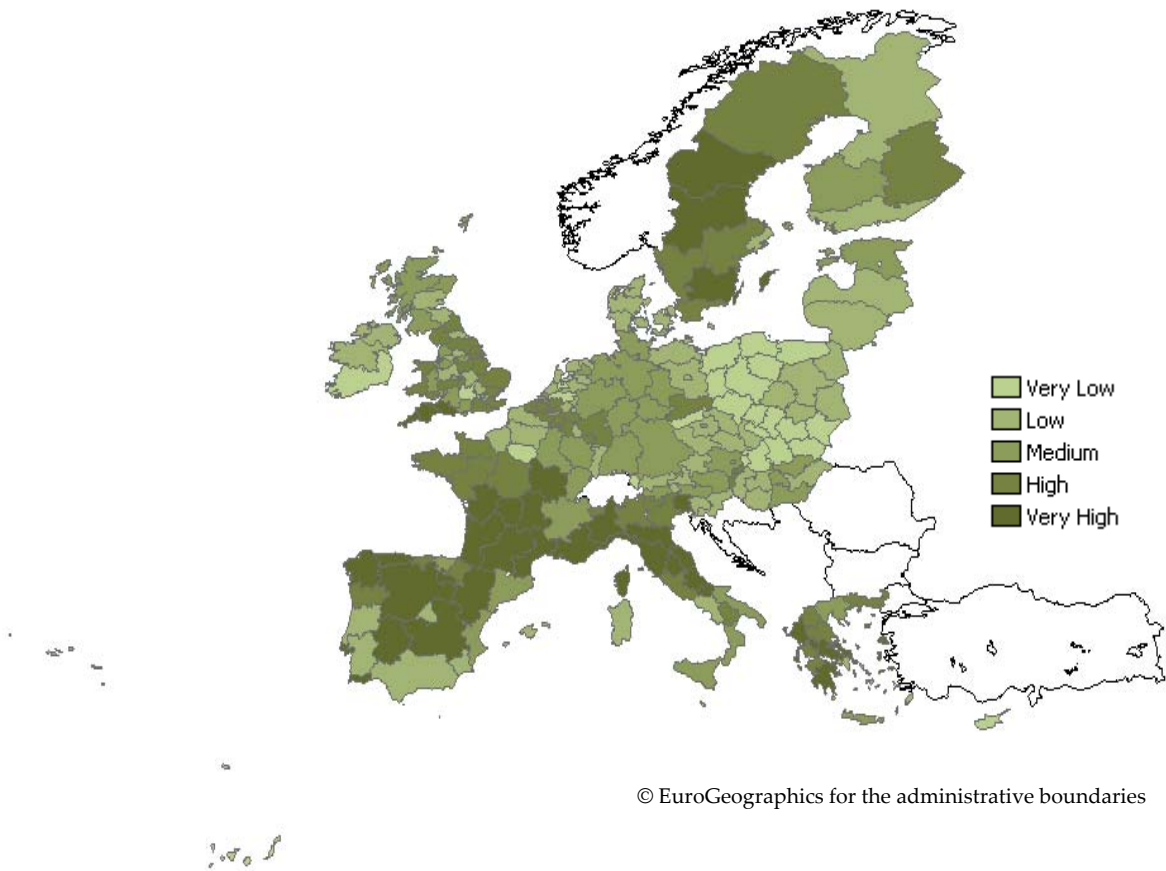
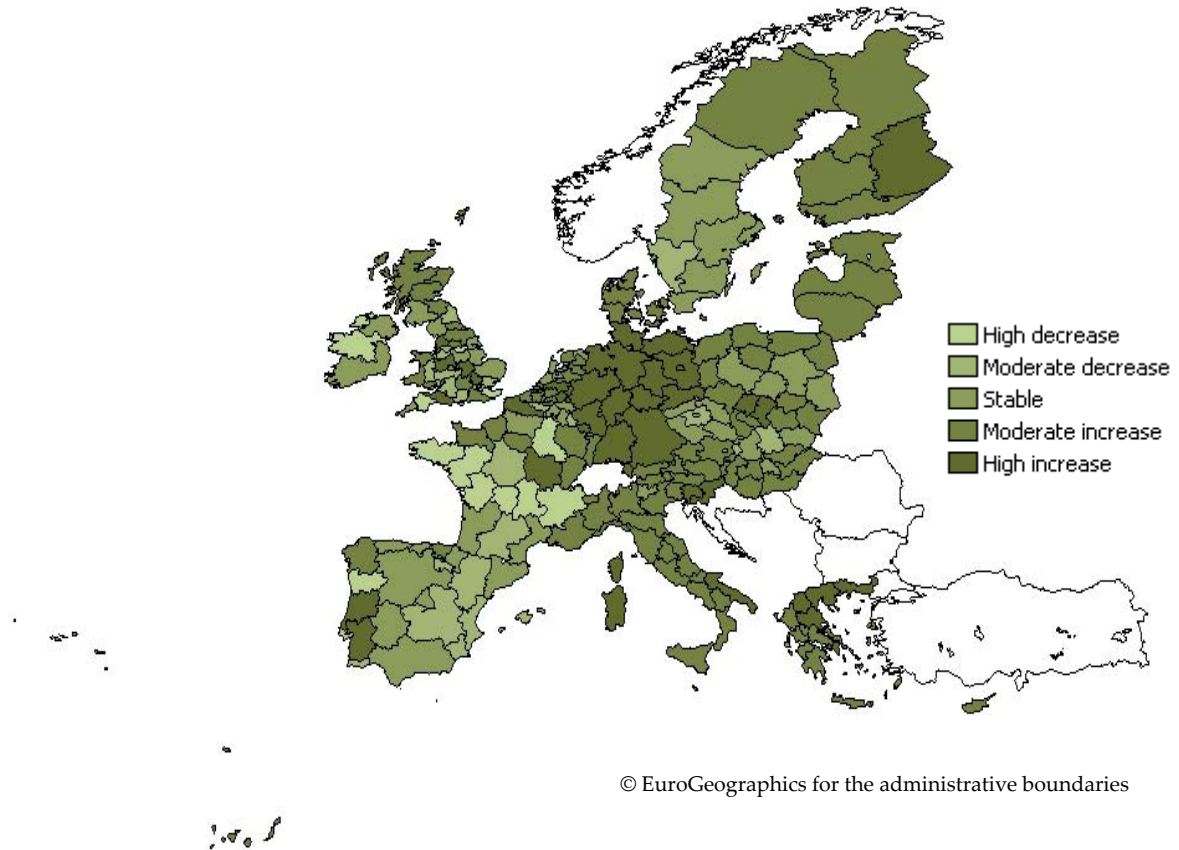


Figure 2.4b: Old age dependency ratio, 2000-2006 trend



Source: Eurostat, General and Regional statistics.

2.2.2 Gender equality: the regional situation in year 2000 and trends 2000-2006

A) The gender gap in employment

Gender gaps in employment rates across European regions are **quite differentiated**. In year 2000 the gap ranges from the exceptionally high value for Malta (over 38 percentage points) to the exceptionally low value for Övre Norrland (Sweden) (0.6 percentage points). Though, as shown in the literature review, everywhere the gap is positive indicating that in spite of territorial differences, female employment rates are systematically lower than male ones.

The situation in 2000 can be described as follows³⁴:

- Extremely **high gender gaps** in the **employment rate** are to be found in the **Mediterranean area**: together with the already mentioned case of Malta, Spanish, Italian and Greek regions belong to this group. When considering **medium-high indices** of the gender gap in employment rates **the great majority of Southern Europe is covered** (with

³⁴ See Annex IIb for methodological details on the definition of a high, low or null gender gap.

the exception of some Portuguese regions) but also some regions in **Continental Europe** (Friesland, Drenthe, Overijssel, Noord-Brabant, Gelderland, Noord-Holland, Zeeland, Zuid-Holland in the **Netherlands**; Tirol, Vorarlberg, Steiermark, Kärnten, Niederterreich, Burgenland and Oberösterreich in **Austria**; Luxembourg, Antwerpen, Liège, Limburg, Hainaut in **Belgium**; Nordrhein-Westfalen in **Germany**). In **Eastern Europe** only some **Czech regions** are involved (Stredn-Cechy, Strední Morava, Jihozápad) and in the Anglo-Saxon area only some **Irish** regions belong to this group (Border, Midlands and Western and Southern and Eastern).

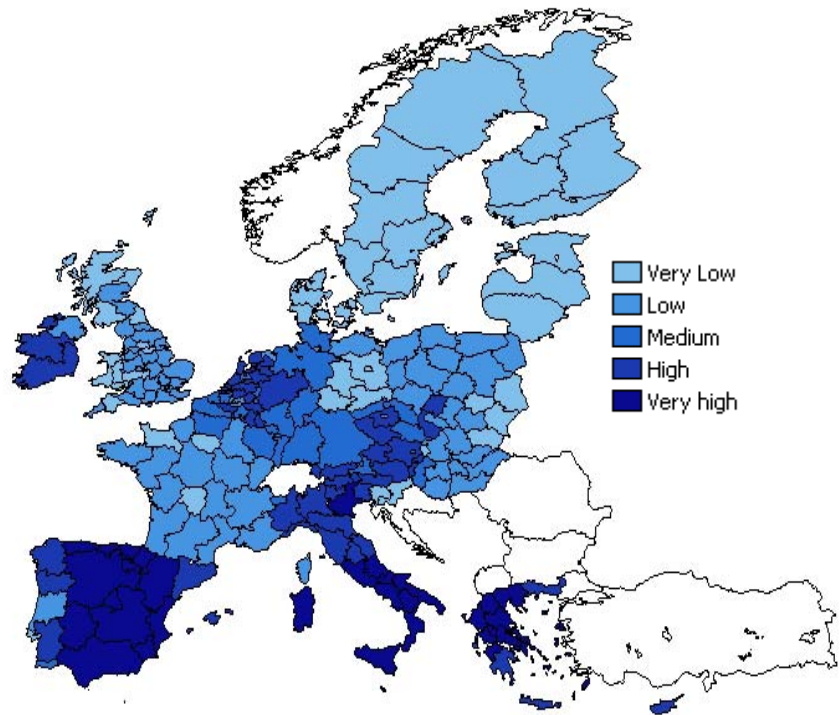
- Regions with **very low gender gaps in the employment rate** are concentrated in **Northern Europe** (regions in **Sweden, Denmark and Finland**) and in the **Anglo-Saxon area** (several regions in the **UK**). Also some **Eastern European** regions show this characterisation: in particular **Latvia, Lithuania, Estonia** and few **Polish regions** (Swietokrzyskie, Lubelskie, Podkarpackie) together with part of the **Slovakian** (Bratislavský kraj, Východné Slovensko) and **Slovenian territory** (Zahodna Slovenija, Vzhodna Slovenija). In **Continental Europe**, higher gender equality in employment can be found in **some French** (Basse-Normandie, Limousin, Ile de France) and **German** (Berlin, Brandenburg) **regions**.
- **Low indices for the gender gap in employment rates** are present in the great majority of the **UK territory**, a significant part of the **French one** and part of the **Eastern European** regions (Moravskoslezsko and Praha in the **Czech Republic**; Dél-Alföld, Közép-Dunántúl, Közép-Magyarország, Dél-Dunántúl, Észak-Alföld, Észak-Magyarország in **Hungary**, and several **Polish regions**).
- Regions with a **medium gender gap in the employment rate** belong mainly to the **Centre-Western area of Continental Europe** (several **German** and **French** regions and some **Dutch, Belgian** and **Austrian** ones) together with part of the **Czech Republic** (Severozápad, Jihovýchod, Severovýchod).

In the 2000-2006 period, as already pointed out in the literature review, the great majority of EU regions registered an improvement in gender equality, with **lower gender gaps in employment**³⁵. Indeed around 75% of EU regions registered a decrease in the gap (independently from its level in 2000) and around 14% maintained the 2000 level.

Regions where the gender gap worsened deserve a deeper insight. This group is composed both by regions with only a slight worsening of the situation such as **regions in Eastern European countries** (Slovakia, Lithuania, Latvia, Slovenia, part of Poland), by regions where the gap was already relatively low (part of **UK** and **Sweden**) and by regions with a **relatively stronger worsening** (**Sweden** mostly where, however, the gap was quite low).

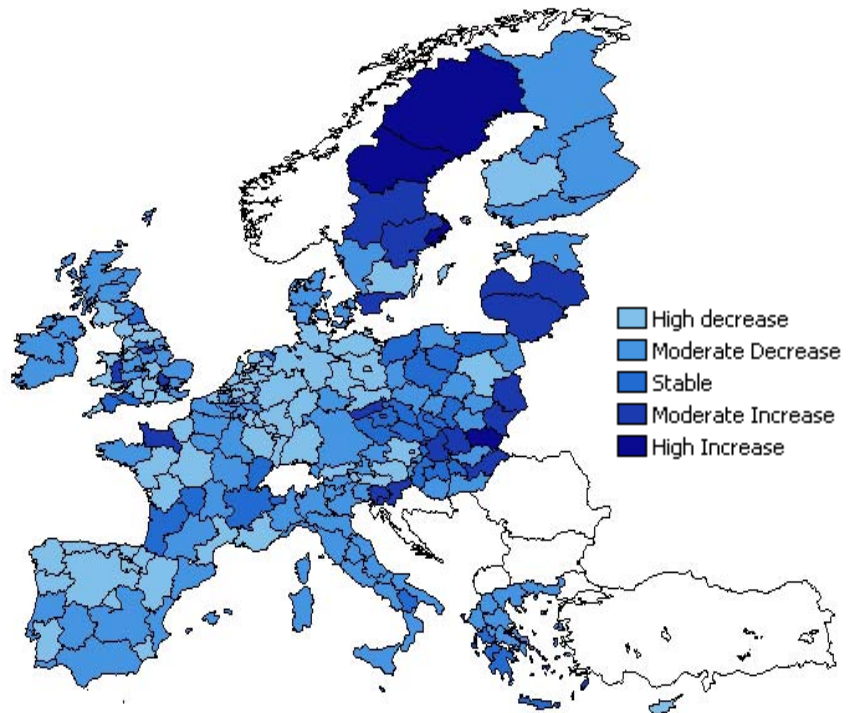
³⁵ See Annex IIb for methodological details on the definition of trends.

Figure 2.5a: Employment gender gap, 2000



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Figure 2.5b: Employment gender gap, 2000-2006 trend



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Source: Eurostat, General and Regional statistics.

B) The gender gap in unemployment

Gender gaps in unemployment rates across European regions present a quite differentiated situation. In 2000, the gap ranges from the exceptionally high value for Spanish regions as Ciudad Autonoma de Ceuta and Extremadura (around - 20 percentage points) to the exceptionally low value for Lithuania, Merseyside in the UK and Övre Norrland in Sweden (around + 4 percentage points, indicating that women are relatively less unemployed than men).

In 2000 around 60 regions registered a **null or positive unemployment gender gap**: the **UK regions, Southern and Eastern Ireland, Swedish** and several **German and Austrian regions** together with **several regions in Eastern Europe** (Estonia, Latvia, Lithuania and notable number of **Hungarian** regions).

The situation in 2000 registered anyway a more widespread presence of negative gaps, indicating a female disadvantage relative to men³⁶. In particular:

³⁶ See Annex IIb for methodological details on the definition of negative, positive, null, high, medium and low gender gap in the unemployment rates.

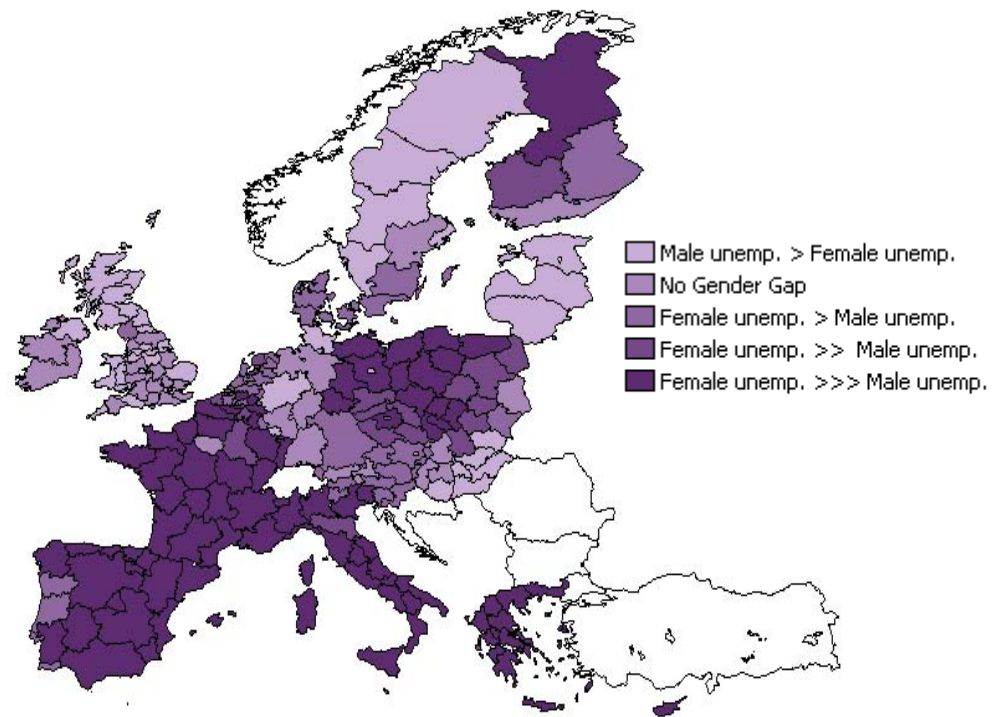
- **Very high gaps were present in** the majority of regions in **Italy, Spain and Greece**, and at a lower intensity in a notable number of regions in **Poland and France**, some regions in **Belgium, Germany** and in the **Czech Republic**.
- **High gaps were present in the following group of regions:** Stredné Slovensko in **Slovakia**; Malopolskie, Swietokrzyskie, Lozkie, Mazowieckie, Podlaskie in **Poland**, Friesland and Flevoland in the **Netherlands**; Emilia-Romagna in **Italy**, Ionia Nisia in **Greece**, Champagne-Ardenne in **France**; Länsi-Suomi in **Finland**; Sachsen in **Germany**; Jihozápad, Jihovýchod, Severovýchod and Severozápad in The **Czech Republic**; Prov. West-Vlaanderen and Prov. Namur in **Belgium**.
- **Limited gaps** (though favourable to men) are to be found in some **Swedish** (Småland med öarna, Sydsverige), **Finnish** (Åland and Itä-Suomi) and **Danish** regions (Hovedstaden, Sjælland, Syddanmark, Midtjylland, Nordjylland) as far as Nordic countries are concerned. **Portugal and the Netherlands**, also present a notable number of regions with limited gender gaps in the unemployment rate, together with several **Austrian** regions, **Slovakia, Slovenia** and the Autonomous Northern provinces of **Italy** (Trento, Bolzano).

The trend from **2000 to 2006**³⁷ highlights that, independently from the positive or negative situation in 2000, over **53% of EU regions covering all EU countries underwent a positive trend**, that is a trend where the female disadvantage was being reduced, in spite of the significant differences that still characterize **Northern, Continental, Mediterranean and Eastern European regions**.

It is worth noting that regions experiencing a **worsening situation** in terms of gender gap in unemployment rates are to be found both among **those regions where the gap was quite limited in 2000 and among those where it was severe**. In particular, regions in **Hungary, Slovakia, Slovenia, Portugal, Greece, Austria** together with a few **British regions** and **Malta** experience a negative trend.

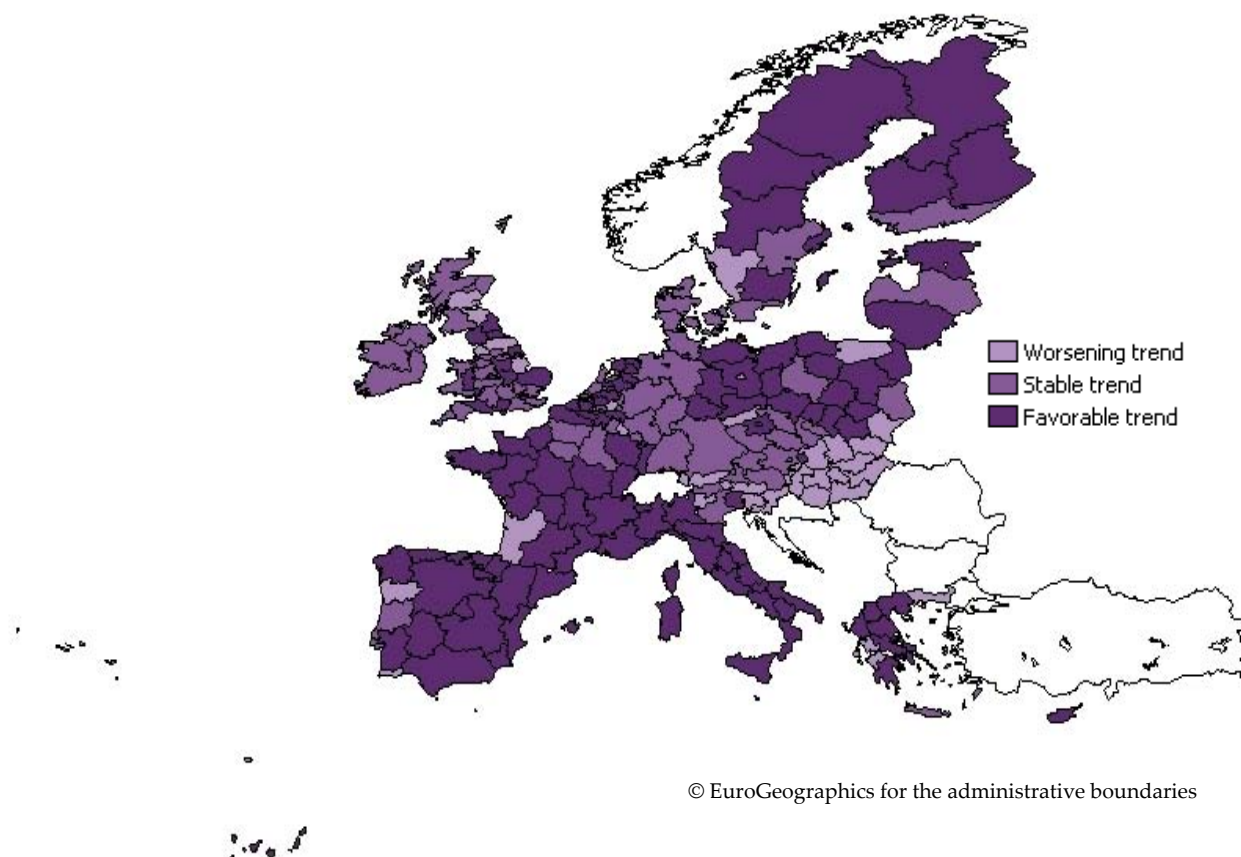
³⁷ See Annex IIb for the methodological details on the definition of trends.

Figure 2.6a: Unemployment gender gap, 2000



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Figure 2.6b: Unemployment gender gap, 2000-2006 trend



Source: Eurostat, General and Regional statistics

C) The share of women in Regional Assemblies

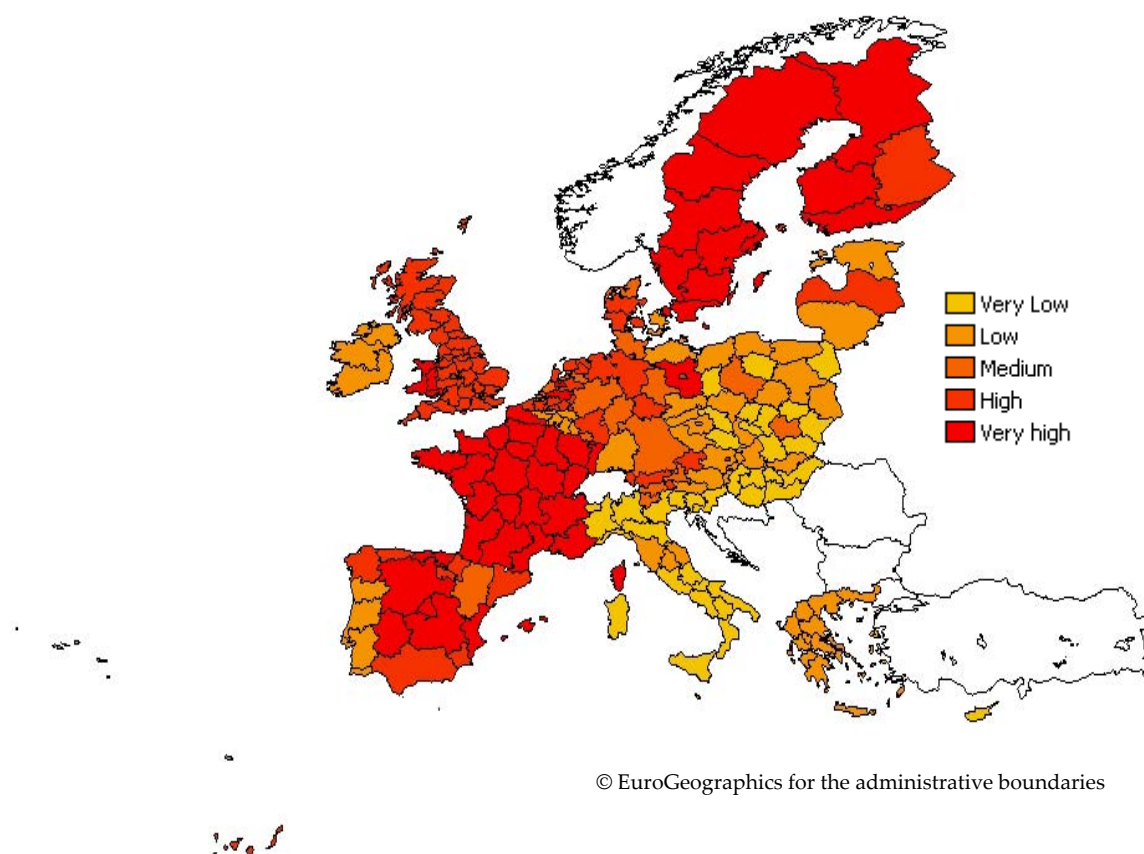
The third gender equality indicator considered in the analysis is the share of women in Regional Assemblies, used as proxy to register the political inclusion of the female population. The regional situation confirms the evidence presented in chapter 1.

- Regions where women represent a **very low share**³⁸ in the Regional Assemblies are the majority of **Italian Regions** (Lombardia, Friuli-Venezia Giulia, Lazio, Abruzzo, Emilia-Romagna, Valle d'Aosta, Piemonte, Liguria, Veneto, Basilicata, Sardegna, Molise, Campania, Calabria, Sicilia, Puglia), and a significant group of **Polish** (Kujawsko-Pomorskie, Opolskie, Swietokrzyskie, Lubuskie, Podkarpackie, Slaskie, Podlaskie), **Hungarian** (Közép-Magyarország, Közép-Dunántúl, Észak-Alföld, Dél-Dunántúl, Nyugat-Dunántúl, Dél-Alföld) and **Czech** regions (Jihovýchod, Moravskoslezsko, Severovýchod) together with **Slovenia** and **Slovakia**. In the Mediterranean area, also **Malta**, **Cyprus** and the **Greek region** of Voreio Aigaiio belong to this group.

³⁸ See Annex IIb for methodological details on the definition of high, medium and low shares of women in regional assemblies.

- Regions where women represent a **quite low share** of the Regional Assemblies are mostly **Mediterranean regions** (especially **Greek, Portuguese** and the remaining **Italian** regions) and Regions in **Eastern European countries** (mainly **Czech** regions, **Estonia, Slovakian** regions). Some regions of **Continental Europe** also belong to this group, and precisely several **Belgian, Austrian** and **German** regions.
- The **highest political participation** of women in regional assemblies is to be found in several **French, Swedish** and **Spanish** regions. **Medium-high shares of women in regional assemblies** characterise instead the **UK, regions in Continental Europe** (many regions in **Germany, Austria, Belgium**) and the **remaining regions in the Northern Europe** (Sweden, Finland).

Figure 2.7a: Share of women in Regional Assemblies, 2007



Source: our elaboration European Commission data, DG EMPL, Database on women and men in decision-making

2.3 Ranking and clustering of the EU regions according to the indicators identified

To proceed with the selection of the 20 EU regions, where the ERDF interventions were or could be relevant as far as demographic change and gender equality issues are concerned, two different statistical steps have been considered:

1. **The ranking of the EU regions according to each indicator** in order to identify the best and worst performers in relation to every single indicator. This approach was used to determine whether in the final selection of regions, those regional cases which should deserve special attention due to their “extreme” positioning in the regional ranking were adequately taken into account.
2. **The clustering of the EU regions according to the selected set of indicators**, in order to identify clusters of similar EU regions in relation to demographic change and gender equality. This **cluster analysis** allows the **natural groupings** (or clusters) of observations to be identified, and could be viewed as an **exploratory data analysis technique**.

A set of 9 regional clusters has been identified (see Annex IIb for the statistical details, the methodology and the list of the Regions by cluster).

Compared with the average values of the indicators calculated on all the European regions, the nine clusters can be qualitatively described as follows:

1. **Cluster 1** (17 regions, mostly **French**): Medium-low gender gaps in employment and unemployment, positive and high natural population balance; quite negative migration balance; significant fertility rates and quite young population; very high share of women in regional assemblies.
2. **Cluster 2** (45 regions, mainly **Continental European** plus **Scotland**): Average gender gaps in employment and low gender gaps in unemployment; positive and high demographic balances; fertility rates, old age dependency ratio and share of women in regional assemblies are similar to the average.
3. **Cluster 3** (42 regions, **Eastern European** regions): Low gender gaps both in employment and unemployment; negative demographic balances; very low fertility rate and very young population; very low share of women in regional assemblies.
4. **Cluster 4** (37 regions, mainly **UK regions** plus **Denmark**): Low gender gaps both in employment and unemployment; very negative migration balances; fertility rate and old age dependency similar to the average; high share of women in regional assemblies.
5. **Cluster 5** (33 regions, **North-Centre Italy, Greece and Spain**): significant gender gaps both in employment and unemployment; negative natural balance and positive migration balance; low fertility rates and population older than the average; low share of women in regional assemblies.

6. **Cluster 6** (9 regions, mostly **islands**); very high gender gaps in employment; unemployment gender gap lower than the average; positive and high demographic balances, particularly the migration balance; very high fertility rates, quite low share of woman in regional assemblies.
7. **Cluster 7** (20 regions; e.g. **Southern Italy and Spain, Greece**); Very significant gender gaps both in employment and unemployment; positive demographic balances; very low fertility rates and quite old population; medium-low share of women in regional assemblies.
8. **Cluster 8** (3 regions, Ciudad Autonoma de Ceuta and Melilla- ES- and Guyane –FR). Very significant gender gaps both in employment and unemployment; positive demographic balances; high fertility rates and population younger than the average; medium-high share of women in regional assemblies..
9. **Cluster 9** (28 regions; e.g. **Sweden**); Very low gender gaps in employment and unemployment; positive demographic balances; significant fertility rates and old age dependency ratio; very significant share of women in regional assemblies.

Apart from cluster 8, not considered for the selection due to its very peculiar characteristics, the final selection of the 20 regions considers that **all clusters are to be represented**. Additionally, the overall size of the clusters has to be taken into account as larger clusters will have to register a greater number of regions in the final sample selection, relative to smaller clusters.

2.4 Identification of integrative criteria to select the 20 regions

At this step of the analysis, clusters of similar regions and regional rankings in relation to demographic change and gender equality are available. In order to select the 20 regions among those clustered in a given group, **integrative criteria** have been considered, with special focus on:

- a) ERDF resource allocation;
- b) programme coverage;
- c) territorial coverage.

In addition, to select the regions within each cluster, preference was given to the regions included in the tentative list provided by the ToRs and to regions belonging to the Silver Economy Network³⁹. The Regions selected includes 15 regions indicated and 5 regions not indicated in the tentative list and 2 regions belonging to the Silver Network Economy.

- a) In relation to the **ERDF financial relevance**, priority was given to regions that presented the highest value of ERDF expenditure *within the same cluster*. In the case that several regions within the cluster were present in the tentative list, ERDF financial relevance became the discriminating criterion to choose the regions to be considered for the final choice.

The rationale is that of considering, among potentially equivalent regions, those covered by more consistent ERDF resources. The relative extended number of cluster identified has secured that also Regions where gaps in terms of gender equality and demographic change are present (even if they are not mainly addressed by Structural Funds) have been taken into adequate account.

- b) In order to guarantee **Programme Coverage**, coverage for Programme/Objective 1 and 2 regions was considered⁴⁰. Given the scope of the study, priority has been given to the **ERDF Regional Programmes**, in case the set of potential regions to be chosen within a given cluster were covered by different types of Structural Fund Programming. However, **National Programmes** were necessarily considered in the case of New Member States⁴¹.

The following table lists the selection output in terms of Programme Coverage.

Selected regions by Objective	
	N
Objective 1	11
Objective 2	9
Total	20

- c) With respect to **territorial coverage**, no more than two regions per country have been considered (especially for those countries where regional differences are extremely significant, such as Italy).

³⁹ The SEN@ER - Silver Economy Network of European Regions is a joint initiative of European regions initiated by the region of North Rhine-Westphalia (Germany). This European initiative regards the ageing trend not as a threat but rather as a challenge and an opportunity for regional economic growth and for improving Europe's competitiveness. To realise this, the Silver Economy Network of European Regions (SEN@ER) has been established as a European-wide network of regions to promote the development and marketing of innovative products and services aimed at this new market segment, thereby contributing to regional development and job creation.. <http://www.silvereconomy-europe.org/network/index.htm>.

⁴⁰ According to the DG Regio data base during the 2000-2006 and 2004-2006 programming period, a total of 226 Programmes have been funded, totally (82) or partially by the ERDF. They include Objective 2 as well as Objective 1 regions, and they can be regional programmes (most), national programmes (especially for new member states) and multiregional (addressing more than one region in a country but not all of them). The figures are the result of IRS_CSIL processing of the database provided by the DG REGIO. More specifically, from the full list of the programmes only Objective 1 and 2 Programmes with a contribution of ERDF have been selected.

⁴¹ This is because in these countries only two regional programmes have been funded by the ERDF (Prague and Bratislava), while all the others have been financed by national or multiregional programmes.

The following table provides the selection output in terms of Programme Coverage, which respects the initial hypotheses on the threshold proposed in the Inception Report: 14-16 regions covering old EU member states and 4-6 regions covering new Member States.

Selected regions by old/new member states	
	N
Old member states	14
New member states	6
Total	20

The coverage of **different Settlement Structures** was also considered in order to take into account the dimension of the spatial differentiation of demographic change, using the Settlement Structure classification elaborated by the ESPON project⁴² which distinguishes between regions on the basis of the population density and the presence of urban centre, from demographic data for the period 1995-1999⁴³.

The settlement structure was used in order to have a sample covering as much as possible the different settlement structures. The output of the selection in terms of different Settlement Structures coverage is presented in the table below.

Selected regions by Settlement typology (ESPON)	
	N
1: very densely populated with large centres,	4
2: very densely populated without large centres,	1
3: densely populated with large centres,	4
4: densely populated without large centres,	1
5: less densely populated with centres,	4
6: less densely populated without centres	4
Total	18*

* Missing data for 2 German Regions

The selection has also considered, among the regions within a given cluster, those which presented a significant ranking position with reference to the values of the indicators.

⁴² European observation network for territorial observation and cohesion http://www.espon.eu/mmp/online/website/content/tools/832/873/605_EN.html

⁴³ This classification considers six different typologies of regions: 1.very densely populated regions with large centres, 2.densely populated regions without large centres, 3.densely populated regions with large centres, 4.densely populated regions without large centres, 5.less densely populated regions with centres, 6.less densely populated regions without centres

2.4.1 The selected regions

The 20 regions selected are listed in the following table.

Number	Country Code	Region	Number	Country Code	Region
1	fr	Nord - Pas-de-Calais	11	sk	Bratislavský kraj
2	fi	Pohjois-Suomi	12	uk	Eastern Scotland
3	at	Salzburg	13	it	Liguria
4	de	Baden-Württemberg	14	es	Castilla y Leon
5	nl	Gelderland	15	mt	Malta
6	de	Sachsen	16	ie	Southern and Eastern
7	lv	Latvia	17	gr	Thessalia
8	hu	Közép-Magyarország	18	it	Basilicata
9	pl	Dolnoslaskie	19	se	Övre Norrland
10	cz	Praha	20	uk	Cornwall and Isles of Scilly

Details on the list of the 20 regions are provided below. Table 2.3 presents details on the Programme and territorial coverage; ERDF expenditure in the programmes implemented in the regions; whether the region is or is not present on the tentative list provided by the ToRs; and the specification of settlement patterns, according to the ESPON Settlement Typology.

In table 2.4, the demographic change and the gender equality indicators for the selected regions are presented, together with the belonging cluster (with cluster average values). Note that some regions belonging to specific clusters may show indicators assuming values particularly different from the cluster average. This is because the cluster analysis can exhibit outlier values for one indicator when all the others are similar to the cluster average.

Table 2.3: Selected Regions by cluster, Programme Coverage, ERFD Financial Allocation resources and Settlement Typology

	Country	Region	Obj. 1/2	Programme	ERDF Financial Allocation 2000-2006	ToR Tentative list	Silver Network Economy	Espon Settlement typology
Cluster 1 (N. 17)	1) FI	Pohjois-Suomi	1	Ob.1 Programme for northern Finland Western Finland Ob.2 programme	169,719,000 227,507,000	Yes	No	6
	2) FR	Nord - Pas-de-Calais	2	SPD Obj. 1 Nord-Pas-de-Calais SPD obj. 2 Nord-Pas-de-Calais National Programme national d'assistance technique Programme National Informatique PRESAGE	271,917,658 556,166,269 3,087,000 5,828,696	Yes	No	3
Cluster 2 (N. 45)	3) AT	Salzburg	2	SPD obj. 2 Salzburg	18,533,000	Yes	No	5
	4) NL	Gelderland	2	Ob.2 programme for east Netherlands Ob.2 programme Urban areas	147,960,000 208,170,000	Yes	Yes	3
	5) DE	Baden-Württemberg	2	SPD obj. 2 Baden-Württemberg	98,320,852	No	No	
Cluster 3 (N. 42)	6) CZ	Praha	2	SPD Ob. 2 National OP Infrastructure	71,295,400 246,360,355	No	No	1
	7) DE	Sachsen	1	PO obj. 1 Sachsen multiregional OP obj. 1 Transport	3,425,898,314 1,661,000,000	Yes	No	
	8) LV	Latvia	1	National OP Ob.1	382,043,677	No	No	5
	9) HU	Közép-Magyarország	1	Human Resources Development operational Programme ob. 1 (national) Regional Development OP ob.1 (national) Environmental Protection and Infrastructure ob.1(national) Economic Competitiveness ob.1(national)	177,381,752 305,744,465 327,245,758 429,009,213	No	No	1
	10) PL	Dolnoslaskie	1	multiregional Integrated Regional Development OP multiregional OP Improvement of the Competitiveness of Enterprises multiregional OP Transport-Maritime Economy Technical Assistance	2,530,001,234 1,251,098,419 1,163,384,465 28,304,465	Yes	Yes	2
Cluster 4 (N.37)	11) UK	Eastern Scotland	2	SPD obj. 2 Eastern Scotland	264,969,100	Yes	No	3
	12) SK	Bratislavský kraj	2	Bratislava SPD Ob. 2	37,032,713	No	No	1
Cluster 5 (N. 33)	13) ES	Castilla y Leon	1	OP obj. 1 Castilla y León National OP Lucha contra la Discriminación National OP Société d'information Multiregional OP obj. 1 Asistencia Técnica Multiregional OP obj. 1 Local Multiregional OP Obj 1 Investigación, Desarrollo e Innovación Multiregional OP obj. 1 Competitividad y desarrollo del Tejido Productivo	2,301,773,395 99,815,195 446,568,000 7,640,000 1,120,298,122 1,520,188,173 1,864,082,108	Yes	No	5
	14) IT	Liguria	2	SPD Liguria Ob 2	201,443,238	Yes	No	1

	Country	Region	Obj. 1/2	Programme	ERDF Financial Allocation 2000-2006	ToR Tentative list	Silver Network Economy	Espon Settlement typology
Cluster 6 (N. 9)	15) MT	Malta	1	National OB.1 OP	46,697,639	Yes	No	3
	16) IE	Southern and Eastern	1	Regional OP Ob. 1 National OP obj. 1 Technical Assistance National OP obj. 1 Productive Sector National OP obj. 1 Economic and Social Infrastructure	407,666,601 4,900,000 211,521,023 1,039,621,077	Yes	No	5
Cluster 7 (N. 20)	17) GR	Thessalia	1	Regional OP Ob. 1 National Promotion de l'emploi et formation professionnelle National OP obj. 1 Pêche national Assistance technique national Santé et prévoyance national Formation et éducation professionnelle initiale national OP obj. 1 Environnement national OP obj. 1 Culture national OP obj. 1 Société de l'information national OP obj. 1 Chemins de fer, Aéroports et Transport urbain national OP Compétitivité National OP obj. 1 Routes	414,299,200 10,000,000 34,121,411 76,782,626 171,700,001 364,510,327 398,467,238 480,585,030 1,242,283,999 1,293,752,693 1,826,498,523 3,519,500,473	Yes	No	6
	18) IT	Basilicata	1	OP OBJ 1 BASILICATA Multiregional OP OBJ 1 EDUCATION Multiregional OP OBJ 1 SECURITE Multiregional OP OBJ 1 RECHERCHE Multiregional OP OBJ 1 TRANSPORT Multiregional OP OBJ 1 INDUSTRIE	433,885,000 109,816,000 568,704,003 814,125,003 1,904,642,003 2,181,369,003	Yes	No	6
Cluster 9 (N. 28)	19) SE	Övre Norrland	2	Multiregional SPD obj. 2 Norra OBJ 1 NORRA NORRLANDREGIONEN	164,621,351 259,784,129	Yes	No	6
	20) UK	Cornwall and Isles of Scilly	1	SPD OBJ1 CORNWALL AND THE ISLES OF SCILLY	326,559,500	Yes	No	4

Sources: European Commission, DG Regio, database Fields of Intervention, ToRs Tentative List, SEN@ER Website, ESPON Data Base.

Table 2.4: Selected Regions by demographic change and gender equality indicators and belonging cluster (with cluster average values)

Cluster	Region	Employment gender gap	Unemployment gender gap	Crude rate of population natural increase	Crude rate of net migration	Total fertility rate	Old age dependency	Share of women in assemblies
1	Nord - Pas-de-Calais	18.4	-4.5	5.2	-3.0	2	21.5	50
1	Pohjois-Suomi	9.8	-3.5	3.8	-3.8	2.04	20.4	42
	<i>Cluster average</i>	14	-3.1	6.0	-0.8	1.8	20.6	45.8
2	Salzburg	17.2	-0.5	2.3	1.6	1.39	19.6	31
2	Baden-Württemberg	18	-0.5	1.1	3.6	1.43	23.2	24
2	Gelderland	19.9	-2	4.4	3.5	1.7	20.2	38
	<i>Cluster average</i>	18	-1.2	1.4	3.1	1.5	23.0	31.7
3	Sachsen	12.7	-2.7	-4.3	-3.4	1.15	26.5	27
3	Latvia	12.7	1.6	-5.0	-2.3	1.18	22.3	34
3	Közép-Magyarország	15.3	0.8	-4.3	-0.9	1.17	23.1	14
3	Dolnoslaskie	14.4	-3.8	-0.7	-0.9	1.2	17.5	17
3	Praha	15.2	-1.3	-3.3	-1.5	1.13	23.3	19
	<i>Cluster average</i>	14.3	-1.8	-1.5	-0.4	1.2	20.0	17.5
4	Bratislavský kraj	12.2	-1.2	-1.5	-28.5	1.33	16.9	26
4	Eastern Scotland	13.6	1.4	-0.6	-28.2	1.53	22.2	33
	<i>Cluster average</i>	13.7	0.6	0.7	-12.7	1.6	23.5	34.8
5	Liguria	22.8	-5.4	-6.6	1.1	0.95	39.0	10
5	Castilla y Leon	28.7	-15.6	-2.9	0.6	0.93	33.8	43
	<i>Cluster average</i>	24.1	-6.4	-1.2	3.5	1.2	28.7	19.9
6	Malta	38.2	-0.3	2.1	27.0	1.72	18.0	9
6	Southern and Eastern	22.5	0.3	6.8	7.8	1.85	15.7	18
	<i>Cluster average</i>	26.6	-2.8	4.6	15.5	1.8	17.9	24.2
7	Thessalia	30.7	-16.9	-1.3	-0.4	1.31	27.7	21
7	Basilicata	28.5	-13.5	0.3	-3.7	1.19	27.3	10
	<i>Cluster average</i>	29.3	-13.2	0.7	3.4	1.2	25.3	27
9	Övre Norrland	0.6	4.3	-1.2	-4.5	1.49	27.3	47
9	Cornwall and Isles of Scilly	15.4	0.6	-2.8	10.6	1.76	31.4	36
	<i>Cluster average</i>	11.4	-2.1	0.7	5.2	1.6	29.3	44.6
	TOTAL AVERAGE	17.7	-2.7	0.7	0.5	1.5	23.8	30.0

Sources: Eurostat Database, General and Regional Statistics; ESPON project 1.1.4, ITPS for the total fertility rate; European Commission, DG EMPL, Database on women and men in decision-making for the Share of women in assemblies.

3. Selection of the 12 regions for the case studies

As required by the Terms of Reference, a subset of 12 regions is to be selected out of the 20 regions previously identified in which to conduct the case studies.

This chapter presents the analysis carried out in order to select the 12 regions, following the steps described in the Terms of Reference, namely:

- review of the existing literature on the 20 regions' national/regional strategies in gender equality issues and demographic change;
- selection of 12 regions where ERDF interventions were or could be relevant in addressing gender equality and demographic change;
- formulation of a number of hypotheses on ERDF interventions addressing gender equality and demographic change to be tested in the case studies.

3.1 Analysis of the national and regional strategies in the 20 regions in relation to gender equality and demographic change (task 1.3)

The primary aim of this section is to analyse national and regional strategies on gender equality and demographic change issues in the 20 regions previously singled out:

In detail, the analysis is based on Regional Programming Documents (Single Programming Document - SPD) and Operational Programmes (OPs). In some cases, regional strategies on gender equality and adaptation to demographic change are assessed on the basis of official publications and other policy documents relating to the 20 regions involved in the study. When relevant, national programmes affecting the regions are considered in the comments⁴⁴. In particular, national programmes have been considered for Italy and Spain⁴⁵.

The following table presents only the regional programmes by region analysed through "Classification Grids".

⁴⁴ For these Programmes, no specific Assessment Grids have been prepared. When relevant, national Programmes affecting Regions have been considered for a better understanding of the position of a specific region towards demographic changes and gender equality. During the regional case studies, care will be taken to include these elements within the analysis of the results achieved.

⁴⁵ In both case, the Ob.1 National Operational Programme for Local Development.

Table 3.1: Analysed programmes according to region

	Country	Region	Objective 1 or 2	Programme	Resources
Cluster 1 (N. 17)	1) FI	Pohjois-Suomi	1	SPD Obj.2 Western Finland	227,507,000
	2) FR	Nord - Pas-de-Calais	2	SPD Obj. 2 Nord-Pas-de-Calais	556,166,269
Cluster 2 (N. 45)	3) AT	Salzburg	2	SPD Obj. 2 Salzburg	18,533,000
	4) NL	Gelderland	2	SPD Obj. 2 East Netherlands	147,960,000
	5) DE	Baden-Württemberg	2	SPD Obj. 2 Baden-Württemberg	98,320,852
Cluster 3 (N. 42)	6) CZ	Praha	2	SPD Obj. 2	71,295,400
	7) DE	Sachsen	1	OP Obj. 1 Sachsen	3,425,898,314
	8) LV	Latvia	1	National OP Obj. 1	382,043,677
	9) HU	Közép-Magyarország	1	Regional Development OP Obj. 1 (national)	305,744,465
	10) PL	Dolnoslaskie	1	Multiregional Integrated Regional Development OP	2,530,001,234
Cluster 4 (N.37)	11) UK	Eastern Scotland	2	SPD Obj. 2 Eastern Scotland	264,969,100
	12) SK	Bratislavský kraj	2	SPD Obj. 2 Bratislava	37,032,713
Cluster 5 (N. 33)	13) ES	Castilla y León	1	OP Obj. 1 Castilla y León	2,301,773,395
	14) IT	Liguria	2	SPD Ob 2 Liguria	201,443,238
Cluster 6 (N. 9)	15) MT	Malta	1	National OP Obj. 1	46,697,639
	16) IE	Southern and Eastern	1	OP Obj. 1 Southern and Eastern Ireland	407,666,601
Cluster 7 (N. 20)	17) EL	Thessalia	1	OP Obj. 1 Thessalia	414,299,200
	18) IT	Basilicata	1	OP Obj. 1 Basilicata	433,885,000
Cluster 9 (N. 28)	19) SE	Övre Norrland	2	OP Obj. 1 Norra Norrland	259,784,129
	20) UK	Cornwall and Isles of Scilly	1	OP Obj. 1 Cornwall and the Isles of Scilly	326,559,500

Our systematic review of the literature aims to assess: (a) the extent to which gender equality issues and demographic changes are explicitly taken into account in the design and implementation of the Programmes, and (b) the extent to which the Programmes and policies are specifically targeted at gender equality and address demographic change. The review also aims to identify the specific approaches adopted. This literature review will be facilitated with the use of “classification grids” (see Annex III) distinguishing between different intervention approaches/strategies according to different dimensions such as:

- identification of key aspects in regional conditions and contexts related to gender equality and demographic change addressed by the strategy;
- the presence of elements related to gender equality and demographic change within the general and specific objectives of the strategy and thus identification of different intervention approaches;
- the procedures and the main answers to policy needs in relation to gender equality and demographic change.

3.1.1 Context analysis

Looking at the national and regional programmes, *elements related to gender issues and demographic change are given due consideration when assessing the strengths and weaknesses of the 20 regions in the context analysis.*

Regarding gender equality, each programming document identifies, at least at the formal level, the *positive correlation that emerges between economic growth and gender equality* underlying the equity and efficiency arguments to support the position of women in the economy and in policy-making, as well as the concept that the benefits of eradicating discrimination derive from the better utilisation of resources, which can enhance the competitiveness of the economy.

The Regional Operational Programmes (ROPs) generally take into account the gender dimension in the context analysis with appropriate reference to gender specific issues and indicators, and with special focus on the structure and dynamics of the labour market. Less well-grounded is the policy makers’ capacity to include gender-relevant dimensions in those issues that are not “immediately” related to women such as transport infrastructure and services not related to childcare or elderly care provisions, where the European Regional Development Fund (ERDF) is significantly involved.

One specific aspect of the consideration for gender issues in the context analysis is the use of *sex-disaggregated statistics*. According to a study on the integration of equal opportunities between women and men in Objective 1 & 2 Structural Funds Programming Documents (Engender, 2002), approximately half of the programming documents reviewed refer to sex-disaggregated statistics. Generally speaking, Objective 2 Regional Programmes are stronger in this respect.

Most of the programmes present a *detailed analysis of the female population, in particular concerning labour market conditions*. Attention is paid to participation, employment and unemployment rates, horizontal segregation in educational choices and working sectors, vertical segregation in the labour market and relative wage pay gaps. On the other hand, rather *less attention is paid* to wage determination and work organisation practices, to policies influencing family care tasks, social and cultural environments (such as communication and educational policies) and to development patterns (industrial and infrastructural policies).

For example, in the Objective 2 French region and Objective 1 Irish region *female labour market conditions* are analysed together with *family patterns indicators*: fertility rate, number of children, mean age of women on the birth of the first child, etc.. This issue is *also relevant to demographic change*, but it is of particular importance in investigating other factors, in addition to the national and regional socio-economic context, that typically predict women's employment status and the labour market patterns in the medium and long term. The same can be said of the Objective 1 Spanish region, which considers among other things in the context analysis the problem of re-conciliation of family and professional life.

In general, the regions in the sample appear to differ greatly in terms of the extent of collection and usage of indicators dealing with gender equality and demographic change. Sex disaggregated data tend to be collected in programmes but not always for all measures/actions. Gender specific indicators are found in approximately half of the Programming Documents reviewed, but they are seldom associated with quantified baseline and final targets.

The Italian Basilicata, Latvia, the Austrian Salzburg and the Hungarian Közép-Magyarország programmes are characterized by exhaustive indicators in this respect.

Another aspect related to gender equality, but which also has implications for demographic change, is the composition of population by gender and the distribution between rural and urban areas. In the Objective 2 Scandinavian regions (Finland and Sweden), female migration trends are considered in relation to depopulation of rural areas and examples of particularly affected districts are provided (Pajala in the Sweden region, Kokkola, Pori and others in the Finland region). In the Objective 1 Spanish region, migration from rural to urban areas is seen to involve above all the female population. In Southern and Eastern Ireland, women living in rural areas face particular difficulties such as lack of training and employment opportunities, lack of childcare and care for the aged, and indeed of various other services, and poor representation in decision-making bodies.

With the diversity of the demographic structure and trends and the increasing importance of regional and local public authorities as policy initiators and service providers, it is important that the *effects of long-term population trends be taken into account in framing medium-term strategies and consequently in the context analysis*.

Population change has two components: the so-called "natural increase" (defined as the difference between the numbers of live births and deaths) and net migration (the difference between inward and outward migration). *In the 20 regions, population growth has varied*

significantly over the past years and, according to national population forecasts will show even greater change until 2010. Whilst overall the phenomenon of demographic ageing will be growing considerably more important in the coming decades, different regions are currently facing widely divergent developments in population. Some regions face a “natural increase” accompanied by positive net migration (e.g. Ireland), while others are experiencing dramatic population loss (e.g. Germany, Poland, Slovakia, Malta).

Generally speaking, *more attention is given to demographic changes in the context analysis in the case of Objective 1 Regional and National Programmes*. More specifically, the regional programmes for Spain (Castilla y Leon), Italy (Basilicata), Poland (Dolnoslaskie), Ireland (Southern and Eastern) and the Single Programming Documents for Latvia and Malta contain information on the demographic profiles of the regions. These include *data and considerations on population density, depopulation in urban, rural and sparsely populated areas as well as migration trends*. With the exception of the Objective 1 Poland region, where the population is relatively young as compared to the other European countries, the phenomenon of an ageing population and the resulting decrease in the working age population is, to different extents, affecting all the regions in the sample.

Migration is often considered in terms of internal migration, to the extent that this affects the distribution of population in rural and urban areas and regional unbalances.

For example, the Single Programming Document for Latvia underscores the importance of human resources for regional development, recognising that Latvia does not attract specialists from other countries. Further on, in this context, demographic dispersion becomes relevant when it is the younger people who are more likely to leave their home region (Basilicata in Italy, Latvia, Nord-Pas-de-Calais in France). In the Objective 2 Italian region (Liguria) the decrease in incoming population is due also to the slowdown in the tourism sector, which usually also represents attractions for the elderly population.

Two programmes explicitly refer to minorities in disadvantaged situations within the population: the Roma population in Objective 1 Hungarian region and Sami population in Objective 2 Swedish region. The fact that specific groups of the population live in the most disadvantaged areas of the region suggests extending the strategy to measures also targeted to this population.

3.1.2 General objectives and design of the strategy

As previously discussed (see section 1.3.1), gender equality and demographic changes are considered at different levels in the policy agendas of European Countries. Gender Equality, in particular, has been mainly driven by EC interventions and Structural Fund regulations, while demographic changes have only been considered a priority in the last years of the 2000-2006 period. This is, of course, reflected in the OPs and SPDs analysed⁴⁶.

⁴⁶ These aspects will also be analysed in the case studies.

From the analysis undertaken it emerges that the mere fact that *gender and demographic specific context analyses are carried out does not automatically mean that concrete actions are taken on them*. It has been found that even if various questions have been raised during the context analysis, the *same approach has not always been envisaged in the strategy objectives and measures*.

Referring to the extent to which the general objectives and strategy design explicitly mention gender-relevant issues, *almost all the regions in the sample refer to gender mainstreaming as the approach adopted to improve equal opportunities between men and women*⁴⁷.

In addition, *half of the documents also mention positive action measures in this sense*. In the sample, Ireland (Southern and Eastern), Latvia, Malta, Austria (Salzburg), the UK (Scotland) and Italy (Basilicata) seem to be the most active in taking gender issues seriously when defining the general objectives and designing their Regional Programme strategies. In the Single Programming Document for Malta, the general objective of equal opportunities is promoted through a twofold strategy, combining gender mainstreaming and specific measures targeted to women. Positive action measures are also applied, in addition to the existing legislation, in the Irish region in order to maximise equality of opportunities. In the Regional Operative Programme for Spain (Castilla and Leon), within the gender mainstreaming approach, some objectives are identified: to increase female participation in the labour market and decrease horizontal segregation in the labour market and in female educational choices, as well as decreasing vertical segregation and boosting female entrepreneurship.

Equality of opportunities and social inclusion are also considered as pre-conditions for development. The main fields where these issues must be taken into consideration are employment opportunities, the qualification of human resources and all the areas concerning access to and participation in the labour market.

For example, in Liguria, general objectives of investment and innovation development must be achieved in an equal opportunity perspective, while improvement in the occupational structure, in particular supporting women and young, is considered a means to strengthen the entrepreneurial system and, at the same time, a remedy against social exclusion.

As for Slovakia (Bratislavsky Kraj), France (Nord-Pas-de-Calais) and Poland (Dolnoslaskie), they tend to be less concerned with gender issues at this stage of the programming process.

*It is more difficult to find ready-reference to elements related to demographic change in the general objectives*⁴⁸. The main reason is that the objectives do not directly refer to particular groups of the population, even if there should be an indirect effect on the population as a whole or on some specific groups. When a strategy aims to improve the competitiveness and modernity of the economy, it also ensures a good standard of living for the inhabitants. Much the same applies to

⁴⁷ As previously pointed out (paragraph 1.3.1), the differences between national policy contexts are great. Nevertheless, Gender Equality and Gender mainstreaming have been set in all Member States policy agendas during the period 2000-2006. It has to be said that these issues have been considered especially in ESF and Equal Initiative.

⁴⁸ In this case, as previously pointed out (see paragraph 1.3.1), demographic changes have been explicitly set in policy agendas only recently. Demographic issues have been considered much more at a national level considering the main area of active ageing.

strategies aiming at adaptability, occupational and geographic mobility, and in general reducing territorial disparities.

An interesting example is reported in the Single Programming Document for Latvia where, among other things, the development of human resources is to be encouraged by the private sector in partnership with the universities. Therefore tailored training instruments are to be designed to address particular needs of marginalized sections of the community.

3.1.3 *Specific objectives and design of the measures*

Setting targets associated with specific objectives is one way to ensure that the objectives will be pursued. *While there is often an intention to treat gender and demographic change as a cross-cutting theme, gender and demographic dimensions are commonly lacking in the description of priorities and measures.*

The design of the specific interventions in the programming shows even more clearly the two different approaches to the 'gender question' within the EU countries. On the one hand there is the approach to the gender mainstreaming principle (Anglo-Saxon and Northern Countries), and on the other the dual approach combining gender mainstreaming with positive/affirmative actions (Continental and Southern Countries). With regard to gender mainstreamed fields of intervention, Enterprise and Innovation, Strategic Development Opportunities, Sustainable Communities and Development of rural area seem to be those where Structural Fund Programmes drew the major policy-makers' attention. As for affirmative actions, the fields of intervention are mainly focused on training and labour market policies.

Generally speaking, the review found *more measures with an indirect effect on gender equality and demographic change than measures directly targeting this intent.*

Concerning *gender issues*, specific objectives and measures are related to the *access to quality social health infrastructure, labour market and educational services on the one hand, and support for female entrepreneurship on the other.*

With regard to social health infrastructures, the examples of Objective 1 Latvia and Southern and Eastern Ireland are quite interesting. One of the specific objectives of the Irish strategy is to increase the number of childcare places available, creating a quality environment for children through the provision of capital grants for the refurbishment and construction of care facilities. In addition, the strategy aims to support initiatives to increase the participation of women in economic and social life and in decision making. An original point stressed by the Irish strategy is the consideration of women's particular environmental needs by consulting women's groups on the renovation of local and urban areas. Latvia, as well, focuses on the need to promote health care and social care and improve the quality of education in order to reduce social exclusion.

There are also many typologies of measures that directly or, more often, indirectly, are related to regional demographic change. It is quite common to find, within these measures, reference to the needs to

improve the quality of life and develop rural and disadvantaged areas. This is particularly stressed in the strategy of Latvia, Southern and Eastern Ireland, Castilla y Leon (Spain), Közép-Magyarország (Hungary) for the Objective 1 regions and Praha (Czech Republic) and Pohjois-Suomi (Finland) for Objective 2.

Tourism is, in some cases, identified as a way to provide new and alternative opportunities for the development across the territory, as well as to improve the quality life of the inhabitants. This is specifically envisaged in the programmes of the regions Dolnoslaskie (Poland), Latvia, Hungary, Liguria (Italy).

An important role is also the *infrastructure and transport networks* (railways, roads, ports, etc.). Another relevant point is *improvement of quality in transportation and environmental and social infrastructure*, which has consequences on citizens' quality life. Interesting examples here are Poland, Spain, Czech Republic, and Finland.

3.1.4 Procedures envisaged for the selection of projects, monitoring and evaluation

Another way to assess whether gender mainstreaming and demographic-related objectives are realised concretely is by looking at the project selection procedures adopted across the regions.

Demographic-related issues are not commonly considered in the process of selecting projects or monitoring and evaluation, while a few more interesting examples can be analysed for gender-related issues.

In an overall assessment, on the one hand the OPs show good efforts in designing gender indicators connected with the monitoring and the evaluation of specific measures, even though the efforts are often limited to the consideration of data broken down by gender. On the other hand, comprehensive Programme Evaluation from a gender mainstreaming perspective (along with connected methodologies and tools) does not seem to be adequately considered. In this respect the availability of gender-disaggregated data and gender-sensitive monitoring systems is a central question.

Only a few programmes however, contain a systematic gender impact assessment as well as tools and instruments to ensure that gender equality is one of the criteria for project selection, monitoring and evaluation. Within the selected Objective 1 regions, these are Southern and Eastern Ireland and Malta, while within Objective 2 these are Pohjois-Suomi (Finland), Eastern Scotland (UK) and Övre Norrland (Sweden).

Examples of “gender and demographic sensitive” selection criteria comprise criteria dealing with planned output (e.g. targets for women's participation), projects' subject or content (specifically addressing to women's or defined population groups' needs) or flanking measures (facilitating access to projects and to the labour market for women and other population groups).

The Single Programming Document for the Objective 2 Czech Republic region contains specific indications for the selection of projects in terms of equal opportunities, in particular those concerning support for small and medium-size enterprises and all the projects which indirectly affect labour market and social exclusion. Also interesting is the case of the Objective 2 French region, where the successful instances of improved equal opportunities will be taken as examples of good practices.

“Demographic change sensitive” selection criteria are hardly more classifiable. The review found that less than one-quarter of the selected programmes give some indication to this extent. These criteria should be identified in the creation of new jobs, the reorganisation/revitalisation of those that already exist and in more general promotion of social cohesion. Only in the Hungarian Objective 1 region’s programme is identification made of disadvantaged areas in terms of population characteristics, and this is taken into account in the project evaluation criteria.

Another aspect of incorporating the gender and demographic dimension into programming process concerns the involvement and/or consultations of organizations or authorities responsible for gender equality and/or demographic change in the design of the strategy and its implementation. Relevant issues relate to whether such organisations are represented within the Managing Authorities, and if the Managing Authorities have access to expertise in the field of gender mainstreaming and demographic change.

At a general level, managing organisations have started to take into account the need to involve bodies that, at different levels, are responsible for equal opportunities, as well as gender experts. This involvement is still at a formal level and often limited to consultative roles.

On the subject of authorities or bodies in charge of demographic change, the review has not evidenced significant involvements in the programming process. In general, the Managing Authority has the responsibility to examine and approve the criteria for selecting projects financed under each measure and regularly review the progress made towards achieving the specific objectives of the Programme. Only Spain, Latvia, both the Italian regions (Basilicata and Liguria), the Czech Republic, Slovakia, Austria and Hungary indicate specific involvement of association and/or authorities dealing with gender equality. In the Hungarian Programme the same operation is carried out also for authorities dealing with issues related to demographic change.

3.2 Preliminary identification of the 12 regional case studies (task 1.4)

The aims of this section are to:

- 1) present the impact assessment exercise carried out in order to select the 12 regional case studies;
- 2) present the restricted group of 12 regions to be considered for the regional case studies.

- 3) use the results of the impact assessment exercise in order to draw some working hypotheses on the potential effects of ERDF interventions on gender equality and demographic change.

3.2.1 *Impact assessment exercise*

In order to identify the 12 regional case studies, the analyses the 20 Operational Programmes previously described was supplemented with an *impact assessment exercise* based on the GIA (Gender Impact Assessment) methodology⁴⁹, which was also adopted to address the demographic change issues. More specifically, for each of the 20 Programming Documents:

- each Measure was analysed, paying careful attention to the most significant contribution that may have effects in terms of gender equality and demographic change;
- each Measure was assessed, considering the potential impact on gender equality and demographic change.

As specified in the Inception Report, the potential impact was distinguished between *direct* and *indirect* impacts⁵⁰:

- by *direct impact* of an intervention we mean an impact which *directly affects specific target populations* (for example, female entrepreneurs, ageing people, migrants, etc.) present in a territory;
- by *indirect impact* we mean an impact which *indirectly affects specific population targets* present in a territory (for example, social infrastructures or transportation and environmental infrastructures indirectly affecting women, older people and migrants living conditions and behaviours and that, even if not directly geared to equal opportunities or demographic change aims, may contribute, if properly designed and implemented, to improving gender equality and adaptation to demographic change)⁵¹.

This distinction between direct and indirect impacts is particularly important in the case of ERDF interventions. Many interventions (such as building infrastructures or designing transport systems) may in fact, at a first sight, appear to be neutral (because indirect) from a

⁴⁹ GIA Gender Impact Assessment, Sourcebook 2, Tavistock Institute, GHK, IRS - Istituto per la Ricerca Sociale, *The Evaluation of Socio-Economic Development. The Guide*, December 2003. As stated in EVALSED – Sourcebook 2, GIA is a tool which “helps to estimate the different effects (positive, negative or neutral) of any policy or activity implemented in terms of gender equality (...). This means that GIA should be applied ex ante at the level of (...) every single measure included in the Operational Programme, in order to establish a specific typology of projects or actions in terms of positive, negative or neutral impacts on equal opportunities”.

⁵⁰ The distinction between direct and indirect impact is stated in GIA Gender Impact Assessment, Sourcebook 2, Tavistock Institute, GHK, IRS - Istituto per la Ricerca Sociale, *The Evaluation of Socio-Economic Development. The Guide*, December 2003.

⁵¹ The distinction between direct and indirect impacts is related to the effects of interventions, not to the type of interventions or their objectives, even if direct impacts are usually the result of interventions targeted at specific population groups (specific measures or positive actions), while indirect effects are usually related to “system interventions”, such as infrastructures, which are not targeted to specific population groups (mainstreamed measures).

gender and demographic perspective, but may have strong impact on these areas, which, over the medium and long run, may be even stronger than impacts caused by interventions directly addressing specific groups of population.

Both direct and indirect impacts have been considered according to a different *level of intensity* (high, medium, low) in order to achieve closer specification. The level of intensity is assessed combining both quantitative elements (the number of interventions that may have an impact on gender equality and on the way regions will adapt to demographic change)⁵² and a qualitative assessment. For example, the same Measure is considered to have a high potential level of intensity for one Operational Programme and a medium potential level of intensity for another, in relation to the number of gender or demographic oriented interventions.

The exercise has produced the following main results. For specific details, see Impact Assessment Grids for each of the 20 Operational Programmes (Annex II).

Generally speaking, the first element emerging from the analysis is that for Measures funded by the ERDF, we must speak mainly of *indirect impact*.

In particular *all the Measures* considered in the 20 assessed Programmes *have a potential indirect impact on demographic change*.

In the *case of gender equality*, the situation is slightly different because *some of the Programmes* analysed present a *direct impact*, since they include some specific and direct gender equality actions. This is, of course, due to the specific structure of the ERDF and to the fact that, while gender equality is considered a horizontal priority⁵³ for all Structural Funds, demographic changes are not considered in the same way. So, even if (as seen in the previous section) most of the Programmes take into consideration issues related to demographic change when analyzing their context of intervention, this consideration is not internalized directly within specific Measures.

However, although direct specific actions for gender equality have been promoted in the framework of all Structural Funds programmes and initiatives for more than 10 years, and are clearly identified as part of the gender mainstreaming strategy, *more than the 80% of the programmes make no mention at all of specific direct actions*.

In reviewing the assessment exercise in greater detail, it is possible to identify those *ERDF interventions assessed as having a high–medium level of intensity as being more likely to address gender equality* such as⁵⁴:

⁵² Quantitative elements have consistently been considered together with qualitative assessment: quantitative analysis alone cannot be perceived indicating good quality.

⁵³ This means that Community Support Frameworks (CSFs) and Single Programming Documents (SPDs) often aim at a horizontal integration of gender equality into all actions and programme priorities together with specific measures to reduce gender gaps.

⁵⁴ The interventions reported are those considered in the Assessment Grids to have been assessed with a medium and indirect and direct impact. Given the fact that each Operational Programme or Single Programming Document assessed uses different ways of labelling Measures and interventions, those listed above are representative of all the Measures and the interventions that may be found in the Assessment Grids.

- Shared business services (business estates, incubator units, stimulation, promotional services, networking, conferences, trade fairs);
- SME support services (financial and technical) to meet better the needs of entrepreneurs wishing to start and develop new businesses;
- Measures to increase the local development of specific key growing sectors (such as tourism, the cultural field, etc.);
- support and advice in areas such as ICT, science and technology/ telecommunications and information society measures;
- Measures to improve the health infrastructures;
- Measures to improve and develop education infrastructures (schools at all levels, Universities or e-learning for all ages) in the framework of human capital enhancement;
- Measures to restructuring social services facilities
- Measures to improve care services for elderly people and/or disabled;
- Measures to increase childcare infrastructures; and
- urban and environmental improvements that improve mobility/accessibility by public transport, safety and security.

These can be collected into *two broad categories* that summarise the most important examples of interventions/Measures:

- a) developing and supporting the local system of enterprises;
- b) developing and enhancing local infrastructures at an urban and regional level improving the quality of life for both women and men.

The first category referring to the *local system of enterprises* is considered to have a *high potential impact on gender equality*, in many cases also at the direct level (interventions specifically directed to female entrepreneurs).

This category includes support for the development and competitiveness of local enterprises that may better meet the needs of women, support for women's entrepreneurship (considering both hard measures – direct investment aid, physical infrastructure, purchase of machinery, etc. – and soft measures – advice, counselling, access to credit, credit subventions and non-refundable grants, etc.), and/or support for networks and associations of women business owners, and mentoring activities by and for women.

All these factors are crucial and may influence the success or failure of the entrepreneurship projects, especially in the more delicate start-up stage: women have many more difficulties in accessing loans and micro credit initiatives and female enterprises usually have a higher mortality rate than the male counterparts.

These measures, *when related to specific economic sectors may increase their potential impact on gender equality*, as is the case of sectors aiming at development of the environment, or the local culture, or the tourist sector, which is often related to female competences and aptitudes. Tourism growth offers additional employment opportunities, immediate prospects and flexibility, especially to women wishing to return to paid employment. The linkage between female capacity and area development (especially in the tourism sector) has been seen as offering an opportunity to give concrete answers to many needs, such as the valorisation of the territory, tourism promotion and female potential in the field of entrepreneurship, emphasising resources that are drawn upon only in part. The interventions characterized by the close connection between territorial resources and their usability in the field of entrepreneurship may, in fact, contribute to the empowerment of sustainable tourism and resources based enterprises, with a strong territorial identity which could be diffused using the new technologies.

The expansion and development of areas such as ICT, science and technology/telecommunications and information society are also sectors in which female enterprises could enter with positive results and contribute to enhancing gender equality. Such enterprises could support the diffusion of the new digital technology tools, with particular attention to the “more disadvantaged” customers/users (such as children, elderly and disabled), and through the formulation of strategies for reconciliation between work and family life. To reduce inequalities between women and men in IT qualifications and employment, specific actions could include the promotion of women’s involvement in innovation and R&D and incorporating a gender perspective into the development and management of science parks, innovation centres, technology and new media centres.

The second category refers to *local infrastructures*, which have a *medium-high level of indirect impact on gender equality*.

Within this category comes the implementation of a number of interventions aimed to maintain and improve the transport infrastructure, provide and develop access to advanced telecommunications infrastructure, and improve the quality of the environmental, cultural, social and recreational infrastructure. Relevant ERDF typologies of interventions are also to be seen in support for social infrastructures⁵⁵ (i.e. health, care and education infrastructures) and/or infrastructure or services enabling the reconciliation of family and working life.

Local transport infrastructures, while not an obviously gender differentiated area, impact women and men differently across many sectors. As women are more reliant on public transport than men, investment in roads will decrease bus journey times and increase safety levels. This investment will also lead to greater ease of access to urban centres which may provide more training and employment opportunities for women.

Such gender differences also arise with regard to all the interventions aiming to support urban renewal and requalification of local areas. As women have less access to private cars than men,

⁵⁵ By social infrastructures we mean all the material infrastructures aiming to deliver social services of different kinds (for example, hospitals, care institutes for elderly, childcare services, etc.).

are generally more dependent on public transport and spend more time with children, they have different environmental needs to those of men. For example, women place more emphasis on the importance of secure and well-lit environments, fewer steps and safe play areas for children. All the interventions aimed to improve the living and environmental conditions in local and urban areas could be used as an opportunity to increase participation, or activate/encourage inhabitants to improve their environment or promote wellbeing for children, young people and the elderly. Other interventions include community managed building design and estate management strategies, particularly those that focus on tackling gender-, disability- and age-related matters of mobility, access to services and security.

In this context, the importance of developing and supporting social infrastructures has the most significant emphasis on gender equality. The promotion of equality between women and men and facilitation of greater female participation in the workplace and in business (especially for mothers wishing to take up a full-time employment) will be achieved through investment in the development of affordable, quality childcare facilities, particularly in disadvantaged areas and/or health and care services for older people.

Many of these aspects have been considered to have a *potential medium-high impact on the possible strategies that regions may choose to adapt to demographic change*. In particular:

- measures to develop and support strategic and growth sectors, such as tourism, the environment and culture in order to attract people and avoid depopulation, especially in specific deprived areas;
- planning and adapting infrastructure and services to changing needs and migration flows (i.e. restructuring of public transport, social services and care services for older people and/or providing key services in demographic decline areas);
- setting up infrastructures for all ages. This would primarily concern transport (i.e. accessibility), but also infrastructures such as health, education, tourism and leisure;
- expanding new technologies, especially those found in public services, to improve access also by older people who have difficulties in moving.

In this case, the *two broad categories* summarising the most important examples of interventions/measures are:

- a) developing and supporting local development to make the region an attractive place to stay, live and work;
- b) developing and enhancing local infrastructures at the urban and regional level to improve the connections within the region and between regions.

The two categories are, of course, interconnected and their impact on the regional capacity to adapt to regional changes is paramount.

All the interventions aiming at enhancing local development in terms of both economic and social factors such as spatial planning, housing, social support networks and community

development, mobility conditions, pollution and environmental conditions become particularly relevant for young migrant workers or single elderly people. Increased migration and mobility flows affect health, social care, education, housing and transportation systems which, if adapted, may impact positively to support the integration of incoming populations and their contribution to economic development.

Interventions focused on the renewal of urban and local areas will also have a potential impact on the possibility of adapting to the demographic change of depopulation. Especially in rural areas and/or areas isolated from others, there is the need to attract/ maintain young people and demographic renewal through the provision of basic services (including social, cultural and educational services). On this issue, transport infrastructure and the development and expansion of new technologies could help remote areas become “closer” (even if they are not so geographically). Specific measures enhancing accessibility and connectivity could potentially have a high impact on demographic change and also contribute in the fight against the exclusion of older people, ensuring that ICT itself does not constitute a barrier to participation.

3.2.2 The selection of the 12 regions for the case studies

The 12 regions proposed for the case studies were selected on the basis of the impact assessment exercise previously described, together with the preceding literature review (section 2.1) and analysis of national/regional strategies.

Particular attention was paid to those regions that in the Impact Assessment Exercise show ERDF interventions with potential high/medium impacts on gender equality and adaptation to demographic changes and therefore adopt a proactive approach to these issues.

Additional criteria were cluster representation, territorial representation, and specific Programming Objective (Objective 1 and Objective 2) representation.

The following table identifies the 12 regions selected among the 20 regions obtained from the cluster exercise.

Table 3.2: The 12 regions proposed for the case studies

	Country	Region
Cluster 1 (N. 17)	1) FR	Nord - Pas-de-Calais
Cluster 2 (N. 45)	2) AT	Salzburg
	3) NL	Gelderland
Cluster 3 (N. 42)	4) GE	Sachsen
	5) LV	Latvia
Cluster 4 (N. 37)	6) UK	Eastern Scotland
Cluster 5 (N. 33)	7) ES	Castilla y León
	8) IT	Liguria
Cluster 6 (N. 09)	9) MT	Malta
	10) IE	Southern and Eastern
Cluster 7 (N. 20)	11) IT	Basilicata
Cluster 9 (N. 28)	12) SE	Övre Norrland

All nine clusters are represented with at least one region; in some cases with more. The European areas are considered because among the selected 12 regions, three are from Mediterranean countries (Italy⁵⁶ and Spain), one is a Scandinavian country (Sweden), two are Anglo-Saxon countries (Ireland and UK), two are from the New Member States (Latvia and Malta that represent a Nordic and a Mediterranean country) and four are Continental Countries (Germany, The Netherlands, France and Austria). Considering the specific Programming Objective, six regions are covered by Objective 1 and six by Objective 2.

The main reasons for selection are the following:

1. The **Nord Pas de Calais region (France)** was chosen because it shows *both gaps in gender equality and problems related to demographic issues* (especially regarding *migration*). Migration involves mainly young people. Between 1990 and 1997 there was an appreciable increase in migration. The issues of gender equality and demographic change in the Regions also need to be considered within the national frame work. It is important to remember that both welfare and family policies in France pay particular attention to gender equality issues, supporting one of the higher fertility rates in Europe. With specific attention to the Single Programming Document (SPD) analysed, it is to be underlined that, in relation to gender equality, the principle of equal opportunities between women and men was promoted in all the project formulations. *Successful interventions affecting gender equalities are taken as examples of good practices*. The SPD contains a certain number of interventions assessed as presenting a *high-medium indirect impact on gender equality and demographic change*: all the Measures aimed to support endogenous development for enterprises and the Measure for developing social infrastructure with the provision of family-friendly facilities. In relation to demographic change, specific Measures aim to improve the attractiveness of the region, like those promoting cultural development projects, local development and local labour markets, the development of damaged areas and urban requalification policies.
2. **Salzburg region (Austria)** was chosen because it presents *both gaps in gender equality and problems related to demographic issues* (especially regarding internal and external *migration and urbanization*). With regard to demographic issues, tackling outward commuting and migration is part of the Single Programming Document (SPD) strategy as well as the extension of the social and cultural infrastructures and the provision of goods and services in peripheral communities. These elements are considered to be very important, so that specific targets are included in the SPD to monitor its effects (e.g. reduction of the outward migration balance by 0.5 percent; reduction in the number of “problem commuters” by 2 percent). As far as gender equality is concerned, the gender mainstreaming approach was adopted in all the SPD measures with specific gender assessment; each Measure was monitored in relation to the extent of its potential impact

⁵⁶ Italy presents two regions (Liguria and Basilicata). The choice of both is justified by the great heterogeneity of the Country (Liguria is in the North and Basilicata in the South), by the fact of representing two different Programming Objectives (Liguria was covered by Objective 2 and Basilicata by Objective 1), by the fact that one presents many more elements and interventions related to demographic change issues (Liguria), the other (Basilicata) to gender equality.

on gender equal opportunities thanks also to regional gender mainstreaming support co-ordinated by regional managers for equal opportunities. The specific attention to gender equality issues is also confirmed by the decision of the sub-committee on regional economy of the Austrian Conference on Spatial Planning to work on the topic of the equalisation between women and men in the regional objective 1 and 2 programmes. In addition, it is worth mentioning the INTERREG IIIB Alpine space project “GenderAlp” in which the Salzburg Region has the lead. The project mainly aims to create sensitivity in gender planning and gender budgeting processes in order to implement gender mainstreaming. With regard to the specific regional Programme analysed, the SPD contains a certain number of interventions assessed as having a *high direct and indirect impact on gender equality and demographic change*. In particular: the Measure for “Improvement of equal chances through further education and provision of places in kindergarten” directly addresses increase in equal opportunities with direct impact on gender equality. Other interventions with high indirect impact on gender equality are those aiming to improve regional attractiveness for living, the quality of the environment and the participation of women, those fostering company plans to hire women, and those supporting greater participation in regional decision-making processes. With regard to demographic change, improvement of the attractiveness of the area with inter-communal cooperation and enhancement of local structures and organizations for regional development are both assessed as presenting a high indirect impact.

3. **Gelderland (The Netherlands)** was chosen because it belongs to the Silver Economy Network of the European regions which highlights the economic opportunities inherent in this demographic change, and because of its attention to demographic change issues. The Eastern part of the Netherlands is characterized by medium-sized cities, rural areas, and natural parks. In the rural areas, the economic structure has undergone major transformations leading to a decrease in the standard of living and population ageing. The SPD contains a certain number of interventions assessed as showing *high indirect impact on demographic change*. In particular, the main objective in the Measures of Priority 1 “Land-use planning” is to foster diversification of the economic activities through land development. The planned Measures include the revitalisation of economic sites, the development of knowledge-based infrastructures and the strengthening of the tourism industry. The creation of new natural parks and the enrichment of cultural and historical sites are also considered. In addition, in the Measures of Priority 2 “Economic stimulation”, the goal is to reinforce the competitiveness of businesses by improving their ability to innovate, encouraging the transfer of knowledge and favouring co-operation between companies. These Measures will apply both to small and medium-sized businesses and to the tourism sector. As far as gender equality is concerned, all the Measures in Priority 3 “Social cohesion” are to be mentioned because of their aim to increase the human resource (women and men) potential in local companies and to strengthen the cultural identity of the region.

Improvement in the economic and social conditions for the settlement of enterprises and citizens is also considered an important objective, while creation of sustainable employment is another significant aspect.

4. **Sachsen (Germany)** was chosen because it presents *interrelated problems on gender equality and demographic issues* such as, for example, a *high number of older women living alone and getting social help and a high rate of unemployed older women*. In relation to demographic issues Sachsen presents a significant *phenomenon of urbanization* (with depopulated rural areas with a high rate of older population), but, at the same time the suburbanisation process, due to migration of families from the urban centres to the suburbs (Chemnitz, Zwickau, Dresden, Leipzig) is continuing. Improvement of the living- working- and life-conditions of the population and improvement of the rural transport system in order to connect peripheral and structural disadvantaged areas to the transnational highways are considered strategic tools, monitored during the programming period. The attention of this Region to demographic issues is also confirmed by the fact that Sachsen has delivered, together with other Central Europe Regions, a *joint declaration called "Facing demographic change as a regional challenge"* highlighting the approaches needed in order to deal effectively with demographic change at the European level and regional level. Particular attention is also paid to the development of the agricultural and tourist sector and to encouraging job-creation for women, especially with new enterprises. The SPD contains a certain number of interventions that have been assessed to have a *high-medium direct and indirect impact on gender equality and demographic change*. In particular, the Measures aiming to support new businesses or those in the field of "improving the economy's competitiveness" that pay particular attention to women's target; the Measures aimed to improve and develop urban and local infrastructures and transportation systems.
5. **Latvia (Latvia)** was chosen because it presents *elements related to gender equality and demographic issues* (especially regarding *urbanization and depopulation*). The introduction of active employment policies and educational systems, ensuring equal opportunities and social inclusion, is one of the preconditions for the development of Latvia's economy and workforce. Reductions in gender gaps in employment and unemployment rates are among the priorities for the period 2004-2006 with use of the gender mainstreaming approach in gender equality policy development. In relation to demographic change, the Operational Programme also aims to reduce territorial disparities through infrastructure Measures supporting new businesses and employment. Attention is also paid to promoting tourism, in order to improve the quality of life in rural areas and to avoid territorial diversification and the marginalisation of specific parts of the region. The Operational Programme contains a certain number of interventions assessed as having a *high-medium indirect impact on gender equality and demographic change*. In the case of gender equality, Measures dedicated to improving credit access for small and medium-size enterprises and related to the development of education, health care and social infrastructures are assessed as

having a high indirect impact on gender equalities and demographic change; in addition, all the Measures aiming to improve and develop the accessibility to the transport system and the information and communication technologies are relevant.

6. **Eastern Scotland (UK)** was chosen because it presents *elements related to gender equality and demographic change* (especially regarding *ageing population and depopulation*). Projects are considered high priority if they aim to remove barriers to access and actively promote equality of opportunity. In particular, interventions to support entrepreneurship and enterprise activities include actions which encourage and promote the increased participation of women entrepreneurs and the provision of integrated child/dependent care facilities in support of business creation/ development. Every funding application made for ERDF support must have clear quantified equal opportunity target goals and appropriate and realistic performance indicators. With regard to demographic issues, investment in locations and sectors of strategic importance for the region as a whole, as well as support for the development of new ventures targeted to activities with growth potential and where there is limited local displacement, are considered the way to make the region more attractive, especially for young people, and to fight depopulation. The exit of older workers from the labour force is addressed in order to support economic and social cohesion and economic efficiency. The SPD contains a certain number of interventions assessed as having a *high-medium direct and indirect impact on gender equality and demographic change*: in particular, for gender equality the Measure for SME Creation and Development (1.1) and other related measures, such as access to risk capital (1.2) and strategic locations and sectors- capital (2.2). For demographic change, all the Measures related to the support and requalification of strategic locations for growing economic sectors.
7. **Castilla y Leon (Spain)** was chosen because it presents *specific issues related to demographic changes such as demographic dispersion, ageing of population and internal migration flows*. The region is characterized by marked demographic dispersion: the territory is divided into 2248 municipalities, most having only a few hundred inhabitants; very strong internal migration flows from rural areas to urban ones and, at the same time, not so strong migration flows of people coming from other countries (those who arrive in Castilla y Leon are from Portugal and from North African countries). Depopulation is also a major problem, especially in the rural areas, together with the ageing of population. All these elements are interconnected with gender issues, due to low fertility rates and the fact that migration flows from rural to urban areas have a marked female connotation with considerable social exclusion problems. In this context, increasing social infrastructures to improve citizens quality life and supporting the development of disadvantaged areas, especially the rural ones, are the main objectives. The gender mainstreaming approach is also considered a general objective to be achieved with the programme. The Operational Programme contains a certain number of interventions assessed as showing a *high-medium indirect impact on demographic change*. In particular, all the Measures aiming to develop the attractiveness

of the region and towns, such as those supporting the urban and the touristic infrastructures, show a high indirect impact on demographic change, as do all the Measures aiming to develop and enhance the connections between rural and urban areas and measures to improve the quality of life for all and cope with the ageing of population phenomenon, such as the social and health infrastructures. The attention to the issue of urban renewal is also confirmed by the Ob.1 Programme Local Development involving seventy-two Spanish towns with more than 50,000 inhabitants (towns in Castilla-Leon were also covered). In particular, Priority 5, Local and urban development, includes the regeneration and equipping of urban areas, and the improvement of urban transport, urban social integration facilities and tourist and cultural infrastructure. Actions are also planned for the conservation and development of the historical, artistic and cultural heritage. Towns with fewer than 50,000 inhabitants benefit from measures to improve infrastructure, public amenities and social and health facilities, to encourage the opening of sports and leisure facilities and to promote local development initiatives.

8. **Liguria (Italy)** was chosen because it presents *specific issue related to demographic changes such as depopulation, ageing of population and internal migration flows*. The population is constantly decreasing above all because of ageing and low migrational inflows; this decrease is particularly marked in the urban and metropolitan areas where there is a clear trend towards deurbanization. Ageing population is a phenomenon typical of both hinterland and coastal places, where there is also marked displacement of citizens from other areas of the region. These problems are aggravated by the weaknesses of the welfare system throughout Italy. All these elements are taken into account by the Region and within the SPD objectives (for example, through attention to development of tourist infrastructure and port areas and support for those hinterland areas characterized by depopulation, to coastal areas with an economy essentially founded on tourism). The importance of tourism also emerges in the approach adopted for gender equality issues and, in particular, in the support and the development of female entrepreneurship. The Liguria Region recently organised a regional Forum on active ageing that also summed up the strategies and the demographic issues tackled by the Regions using the Structural Funds in the programming period 2000-2006. The SPD contains a certain number of interventions assessed as showing a *high-medium direct and indirect impact on gender equality and demographic change*. In particular: measure 1.1 supporting female entrepreneurship: interventions concerning small enterprises with a marked female component, in the sectors of tourism, trade, business and services; measure 3.4 envisaging social interventions specifically for families and excluded groups of population, and to support women employment (for example, day-care centres, centres for elderly and disabled); measure 3.7 envisaging information programmes, training and assistance, in particular to women entrepreneurs. In relation to demographic change all the Measures related to the coastal heritage management (2.5) and the port areas requalification (3.2) together with the Measures aimed to

strengthening and enhance requalification of tourist services (3.3), and urban requalification (3.5).

9. **Malta (Malta)** was chosen because it presents *interrelated problems on gender equality and demographic issues* such as ageing population and decline in birth rates. Moreover, Malta suffers from the very acute environmental pressures of urban areas because of the high density of its population is moving from rural villages to the capital. The issues related to gender equality are consistent with the low female activity and employment rate. Although Malta's Operational Programme is quite modest, also from the financial point of view, several interventions are envisaged in order to ensure that economic development is equitably spread socially and geographically and to promote the provision of personalised quality social services by ensuring equal opportunities for all, with special emphasis on the most vulnerable members of Maltese society (females). In particular, the final beneficiaries of the measures relating to supporting small and medium-size enterprises and human capital should consider the gender equality priority established by the Operational Programme and develop criteria leading to positive actions to favour women. Selection criteria are to be set in order to monitor the integration of the equality principle during project definition, and indicators on how the principle of equal opportunities is taken into account are to be established. The OP contains some interventions assessed as showing a *high-medium indirect impact on both gender equality and demographic change*; in particular, the Measures related to the infrastructures that may support local economy enterprises, especially in the tourist sector.
10. **Southern and Eastern Ireland (Republic of Ireland)** was chosen because it shows *specific attention to gender equality issues*. Also *demographic changes* are considered, especially those related to the phenomenon of a *predominantly urban population concentrated in a relatively small number of centres*. Attention to gender equality concentrates particularly on the possibility that the ERDF interventions be used to *increase the number of childcare places available*, while creating a quality environment for children through the provision of capital grants for the refurbishment and construction of care facilities. Another important objective to be achieved through the ERDF is the *promotion of social inclusion in deprived urban and rural areas* where gender differences are to be taken into account by consulting women's groups in the requalification of local and urban areas. Projects founded under the Tourism Measure are targeted, for the most part, at very peripheral and remote areas where employment opportunities for women are minimal. The gender mainstreaming principle is applied along all the Operational Programme (OP). One of the criteria in the selection process is the impact of a proposed project on equality of opportunities, and particularly on gender equality. Where data do not currently exist, statistical information is to be gathered on a gender disaggregated basis, especially in relation to participation and access. This should assist in the projects design, and ensure that they contribute to gender equality. The promotion of active interventions to foster gender equality in the project work-plans

has been encouraged. The OP contains a certain number of interventions assessed as having a *high-medium direct and indirect impact on gender equality and a high -medium indirect impact on demographic change*, and in particular: for gender, the Measures related to the support to entrepreneurship and the growing sectors in which women can be hired; for demographic change, all the Measure related to the Urban and Village Renewal, to E-Commerce and Advanced Communications Systems. On these issues, it is important to underline also the presence of the National Economic and Social Infrastructure Operational Programme that places special emphasis on extending transport networks.

11. **Basilicata (Italy)** was chosen because it shows *specific attention to gender equality issues*. The gender mainstreaming principle is spread along all the Operational Programme (OP) thanks also to the *presence of an Authority for Equal Opportunities within the Managing Authority*. This has involved particular attention to including specific gender criteria for all the Measures of the OP, *activating specific gender oriented monitoring activities in most of the ERDF interventions*. Reconciliation between family and working life is considered particularly important and promoted with several interventions implementing childcare facilities and developing social infrastructures. Specific gender criteria have been designed and used for the selection of ERDF interventions giving additional points to specific projects that pay attention to gender elements. In particular, it is important to underline the presence of specific gender criteria also in the Integrated Territorial Projects. The issues related to demographic changes are also relevant, especially when considering inland mountainous areas and the Ionic coast, which show depopulation because of migration and ageing population. The OP contains a certain number of interventions assessed as having a *high-medium indirect impact on gender equality and demographic change*. In particular, for gender equality, all the Measures aiming at the preservation and enhancement of historical and cultural resources, as well as those for supporting services for enterprises, especially in strategic sectors like tourism, crafts and services are assessed as having a high indirect impact. With regard to demographic change, some Measures aim to improve the attractiveness of the region and avoid depopulation (especially of young people), such as support for tourism and business ventures and/or policies for the reinforcement and requalification of urban areas. On these issues, it is also important to mention the National Operational Programme for Local Development, which has provided support for initiatives aiming at preventing or reducing the environmental impact of economic activities. Integrated aid packages have also been granted covering investment in equipment, research and development, innovation, guaranteed access to credit and staff qualification.
12. **Norra Norrland region (Sweden)** was chosen because of its *specific attention to demographic changes*. Norra Norrland has one of the sparsest population densities in the European Union. In addition, two-thirds of its inhabitants live in coastal towns with consequent population reduction and ageing in the inland centres. Norra Norrland's main problem is the depopulation caused by a low birth-rate and out-migration of

women and young people. Birth rates have significantly decreased during the last few years, and the negative net migration constitutes the main problem for the region. In certain areas, the imbalance is not limited to age but also to gender. Pajala is nationally known for its lack of women, who often migrate temporarily to larger urban centres seeking training and jobs. The region is “a melting pot” of the Sami, Finnish and Swedish culture. The Operational Program contains a certain number of interventions that have been assessed as having a *high-medium indirect impact on gender equality and a high-medium indirect impact on demographic change*, and in particular: all the Measures aiming at development of the Sami countryside and culture, and those related to the living environment, cultural life and local development. In the Measures dedicated to rural development, the programme will concentrate on investments in businesses, aid for young entrepreneurs, and improving product marketing and training. Specific measures relating to rural development are also planned, such as the diversification of activities, promotion of quality products, protection of the rural heritage, the development of villages and infrastructure and environmental protection.

Table 3.3: The 12 selected regions by selection criteria and main interventions/measures

Regions	Selection criteria	Main Interventions/Measures addressing gender equality and demographic change
1. Nord Pas de Calais region (France)	<ul style="list-style-type: none"> ▪ Gaps in gender equality and migration issues. ▪ Successful interventions affecting gender equalities are taken as examples of good practices. 	<p>Interventions with <i>high-medium indirect impact on gender equality and demographic change</i>:</p> <ul style="list-style-type: none"> ▪ Gender equality: social infrastructures with the provision of family-friendly facilities. ▪ Demographic change: promoting cultural development projects, local development and strengthening of local markets; renewal of damaged areas and cities; urban requalification.
2. Salzburg region (Austria)	<ul style="list-style-type: none"> ▪ Gaps in gender equality and internal and external migration and urbanization. ▪ Tackling outward commuting and migration; extension of the social infrastructures, proving the provision of goods and services in peripheral communities. ▪ Gender equality: each Measure has been monitored by the indication of the extent of potential impact on gender equal opportunities. 	<p>Interventions with <i>high direct and indirect impact on gender equality and demographic change</i>:</p> <ul style="list-style-type: none"> ▪ Gender equalities: Improvement of equal chances through further education and provision of places in kindergarten. Improvement of regional attractiveness, the quality of the environment and the participation of women; increasing the hiring of women, and support for women's participation in regional decision-making processes. ▪ Demographic change: improvement of the attractiveness of the area with inter-communal cooperation and the enhancement of local structures and organizations for regional development.
3. Gelderland (The Netherlands)	<ul style="list-style-type: none"> ▪ Part of the Silver Economy Network. 	<p>Interventions with <i>high indirect impact on demographic change</i>:</p> <ul style="list-style-type: none"> ▪ Measures of Priority 1 (Land-use planning) to foster diversification of economic activity through land development; Measures of Priority 2 (Economic stimulation) to reinforce businesses competitiveness and innovation encouraging the transfer of knowledge and favouring business co-operation. ▪ Measures in Priority 3 (Social cohesion) to increase resource (women and men) potential in local companies and to strengthen the cultural identity of the region.
4. Sachsen Region (Germany)	<ul style="list-style-type: none"> ▪ High gender gaps especially for elderly women. ▪ Urbanization, depopulation and increase of elderly people in rural areas. ▪ Sustained outward migration. 	<p>Interventions with <i>high-medium indirect impact on demographic change and gender equality</i>:</p> <ul style="list-style-type: none"> ▪ Demographic change: Measures aiming to facilitate access to national and international markets, fairs and exposition; Measures dedicated to the renewal of urban and local infrastructures; Measures aiming to support and develop transportations systems. ▪ Gender equality: Measures aiming to support entrepreneurship also through interventions in the field of financial support; Measures aiming to develop

Regions	Selection criteria	Main Interventions/Measures addressing gender equality and demographic change
		infrastructures in the field of professional education, training and further education.
5. Latvia (Latvia)	<ul style="list-style-type: none"> ▪ Gender gaps, urbanization and depopulation issues. ▪ Reduction in gender gaps in employment and unemployment rates is one of the priorities. ▪ Reduce territorial disparities through infrastructure and measures aimed to new businesses. ▪ Promotion of tourism, improving the quality of life in rural areas in order to contrast territorial diversification and social exclusion in disadvantaged areas. 	<p>Interventions with <i>high-medium indirect impact on gender equality and demographic change</i>:</p> <ul style="list-style-type: none"> ▪ Gender equality: Measures dedicated to improve the access to credit for small and medium size enterprises; development of education, health care and social infrastructure; ▪ Demographic change: Measures aiming to improve and develop accessibility and the transport system, as well as information and communication technologies.
6. Eastern Scotland (UK)	<ul style="list-style-type: none"> ▪ Gender gaps, ageing population and depopulation. ▪ Quantified Equal Opportunities target goals and appropriate and realistic performance indicators. ▪ Investment for the development of new activities with growth potential and where there is limited local displacement to increase regional attractiveness and to fight depopulation 	<p>Interventions with <i>high-medium direct and indirect impact on gender equality and demographic change</i>:</p> <ul style="list-style-type: none"> ▪ The Measure for SME Creation and Development (1.1), measures on access to risk capital (1.2), strategic locations and sectors-capital (2.2). ▪ Demographic change: all the Measures related to support and requalification of strategic locations for growing economic sectors.
7. Castilla y Leon (Spain)	<ul style="list-style-type: none"> ▪ Demographic change: such as demographic dispersion, ageing population, internal migration flows of rural areas. ▪ Low fertility rates, marked female connotations of migration flows from rural to urban areas, social exclusion of female immigrants. 	<p>Interventions with a <i>high-medium indirect impact on demographic change</i>:</p> <ul style="list-style-type: none"> ▪ Measures aiming to develop the attractiveness of the region and towns such as those supporting urban and the tourist infrastructures. ▪ Measures aiming to develop and enhance the connections between rural and urban areas and to improve the quality of life and adapt to the ageing of population, such as the social and health infrastructures.
8. Liguria (Italy)	<ul style="list-style-type: none"> ▪ Depopulation, ageing of population and internal migration flows. Ageing population is a phenomenon widespread in inland mountainous areas and coast areas. 	<p>Interventions with <i>high-medium direct and indirect impact on gender equality and demographic change</i>:</p> <ul style="list-style-type: none"> ▪ Gender equality: measure 1.1 supports female entrepreneurship in small enterprises, tourism, trade, business and services; measure 3.4 envisages social interventions specifically for families and excluded groups of population, and to support women's employment (for example, day-care centres, centres for elderly and disabled); measure 3.7 envisages information programmes, training and assistance in particular to women entrepreneurs. ▪ Demographic change: Measures related to coastal heritage management (2.5) and port area requalification (3.2) together with Measures aiming to strengthen and enhance tourism (3.3), and urban requalification (3.5).
9. Malta (Malta)	<ul style="list-style-type: none"> ▪ High gender gaps and ageing population, decline in birth rates. ▪ Very acute environmental pressures of urban areas because of 	<p>Interventions with <i>high-medium indirect impact on both gender equality and demographic change</i>:</p>

Regions	Selection criteria	Main Interventions/Measures addressing gender equality and demographic change
	<p>the high density of the population moving from villages to the capital.</p> <ul style="list-style-type: none"> ▪ Low female activity and employment rate. ▪ Selection criteria in order to monitor the integration of the equality principle during project definition and indicators on how the principle of equal opportunities is taken into account. 	<ul style="list-style-type: none"> ▪ The Measures related to the infrastructures that may support local economy enterprises, especially in the tourism sector.
<p>10. Southern and Eastern Ireland (Republic of Ireland)</p>	<ul style="list-style-type: none"> ▪ Specific attention to gender equality issues. ▪ A predominantly urban population concentrated in a relatively small number of centres. ▪ ERDF interventions to increase the number of childcare places, while creating a quality environment for children through the provision of capital grants for refurbishment and construction of care facilities. ▪ Promotion of social inclusion in deprived urban and rural areas ▪ Attention to gender mainstreaming. The promotion of active interventions to foster gender equality in project work-plans has been encouraged. 	<p>Interventions with <i>high-medium direct and indirect impact on gender equality and an high-medium indirect impact on demographic change</i>:</p> <ul style="list-style-type: none"> ▪ Measures related to the support the female entrepreneurship. ▪ Measures related to urban and village renewal, to e-commerce and Advanced Communications Systems.
<p>11. Basilicata (Italy)</p>	<ul style="list-style-type: none"> ▪ Specific attention to gender equality issues: gender mainstreaming principle adopted thanks also to the presence of an Authority for Equal Opportunities within the Managing Authorities. ▪ Specific gender criteria for selection of ERDF interventions. ▪ Reconciliation between family and working life promoted with various interventions supporting childcare facilities and the development of social infrastructures. ▪ Inland mountainous areas and the Ionian coast show a depopulation trend because of migration and ageing population. 	<p>Interventions with <i>high-medium indirect impact on gender equality and demographic change</i>:</p> <ul style="list-style-type: none"> ▪ Gender equality: all the Measures aiming to preserve and enhance historical and cultural resources, as well as those to support services for enterprises, especially in strategic sectors like tourism, crafts and services. ▪ Demographic change: all the Measures to make the region more attractive and avoid depopulation (especially of young people); support for tourism and business ventures and/or the policies for requalification of urban areas.
<p>12. Norra Norrland region (Sweden)</p>	<ul style="list-style-type: none"> ▪ Specific attention to demographic changes. Norra Norrland has one of the sparsest population densities in the European Union. Two-thirds of its inhabitants live in coastal towns with consequent population reduction and ageing in the internal ones. ▪ Norra Norrland's main problem is the depopulation caused by a low birth-rate and out-migration of women and young 	<p>Interventions with <i>high-medium indirect impact on gender equality and an high-medium indirect impact on demographic change</i>:</p> <ul style="list-style-type: none"> ▪ All the Measures aiming at the development of the Sami country side and culture and related to the living environment, cultural life and local development. ▪ Measures dedicated to rural development, concentrating on business investments, aid to young producers, product marketing and training,

Regions	Selection criteria	Main Interventions/Measures addressing gender equality and demographic change
	<p>people. In certain areas, the imbalance is not limited to age but also to gender. Pajala is nationally known for its lack of women, who often migrate temporarily to larger centres seeking training and jobs.</p> <ul style="list-style-type: none"> ▪ The region is “a melting pot” of the Sami, Finnish and Swedish culture. 	<p>diversification of activities, promotion of quality products, protection of the rural heritage, development of villages and infrastructure and environmental protection.</p>

3.2.3 Formulation of hypotheses on ERDF interventions addressing gender equality and demographic change to be tested in the case studies

In the literature review in chapter 1 we discussed the main dimensions and regional trends in relation to gender equality and demographic change and presented the ERDF interventions which could support gender equality and adaptation to demographic change within the broad areas of ERDF intervention, namely: transport infrastructure; social infrastructures, R&D investment and innovation, SMEs and entrepreneurship, and environmental sustainability.

The analysis of the national and regional strategies in this chapter shows that gender equality and demographic change are usually considered in the context analysis, but continue to find little further development in the intervention design, implementation and evaluation system.

The 12 selected regions proposed for the case studies present, however, a proactive approach to these issues which should help to generate hypotheses on how ERDF interventions may address gender equality and adaptation to demographic change, and help also in assessing and evaluating their actual outcomes and impacts.

Gender equality and ERDF interventions

Although the European Social Fund (ESF) and EQUAL programmes are the primary tool of structural interventions in the field of gender equality, ERDF interventions also play an important role. Evidence from the analysis carried out so far shows that the ERDF may have an impact on gender equality through the following interventions:

- Supporting *business investments* employing women;
- the re-orientation and design of *SME support services* (financial and technical) to meet better the needs of women wishing to start and develop new businesses;
- Measures to support the increased participation of women at all professional levels in growth sectors, such as *tourism, environment, telecommunications and biotechnology, care services*;
- *career support and advice in areas such as ICT, science and technology/ telecommunications and information society*;
- initiatives to *promote the involvement of women in innovation and R&D*;
- supporting *networks and associations* of women entrepreneurs, and *mentoring activities* by and for women, also through the *provision of information*;
- supporting *urban and environmental* measures that improve *mobility and accessibility* to services by public transport and urban time policies, *safety and security* of transportation and urban facilities (e.g. public lighting);
- promoting a *balanced participation in decision-making*;

- *adapting structures and systems* (e.g. for the delivery of education, training, employment and enterprise support) to meet the needs of women better;
- *supporting family friendly policies* (child-care and dependent care programmes, flexible working hours, etc.) and measures to improve the *social infrastructure* (e.g. health infrastructures, education and lifelong learning infrastructures, child and elderly care facilities, ICT infrastructures, etc.);
- *information campaigns* on the gender dimensions (advertising in the local press, publication of good practices, etc.), organization of *seminars and thematic days*, support services for companies, public institutions and other bodies seeking to acquire gender equality measures.

The international literature⁵⁷ on the theme provides a comprehensive assessment of different policy instruments dealing with gender equality. Given the remit of the present evaluation, the results of the analysis of the national and regional strategies and the most important examples of interventions listed before, the analysis will primarily focus on the following ERDF typologies of intervention:

- support for female entrepreneurship (considering both hard measures – financial support and access to physical infrastructures, etc. – and soft measures – advice, counselling, training, etc.);
- social infrastructure or services enabling the reconciliation of family and working life;
- transport infrastructures facilitating mobility for women.

ERDF and demographic change

The period 2000-2006 saw a growing awareness of the importance of demographic change within the framework of Cohesion Policy, due also to the different demographic developments taking place in the European regions.

Although there is no explicit reference to the demographic challenges in the ERDF Regulation, the Fund has addressed the effects of ageing and population changes, especially through:

- Financing and adapting infrastructures to demographic change and migration flows:
 - this primarily concerns *transport infrastructures and their accessibility*, but also *ICT and social infrastructures* such as health, education, tourism, leisure tackling age related issues of access to services, mobility and security;
 - the provision of *basic services* (including transport, ICT, social, cultural and educational services) in *rural and/or peripheral areas* to attract and keep young people and combat depopulation;

⁵⁷ See the list of references presented in Annex 1 for further details.

- interventions in *spatial planning*, urban renovation, *social support networks and community development*, *mobility infrastructures* in urban areas.
- Creation of specific products/services and employment opportunities for the elderly population:
 - supporting innovation and development in the health and care sector;
 - fostering employment for elderly people through home-working and migrants through training, and entrepreneurship support;
 - e-inclusion, using ICT to overcome factors of exclusion and ensuring that ICT itself does not constitute a barrier to participation. Support for accessibility, connectivity, education and attention to the needs of specific population groups, such as the elderly (whose employability might be underused as a result of not having ICT skills).
- Creation of specific services and employment opportunities for migrants:

Table 3.4. presents the main areas of interventions envisaged in the 12 regional OPs, that are addressed to gender equality and demographic change and the main questions which will be considered in the case studies in order to evaluate the performance of the ERDF in terms of expected and unexpected impacts, utility and sustainability.

Table 3.4: ERDF intervention areas and research questions for the case studies

Broad areas of intervention	ERDF interventions	Working hypothesis on the potential effects of ERDF interventions on gender equality and demographic changes	Research questions to be tested in the case studies
Developing and supporting the local system of enterprises	<ul style="list-style-type: none"> ➤ Support for SMEs (incentives, business services, etc.) to female/immigrants enterprises ➤ Creation of business incubators 	<p>ERDF interventions may have a potential <i>high direct and indirect impact on gender equality</i> supporting female entrepreneurship.</p> <p>ERDF interventions may have a potential <i>medium/high indirect impact on demographic changes</i> supporting migration and senior workers business start ups.</p>	<p><i>Outputs:</i> Did the Measures achieve their target? What kind of services and support has been implemented? How many and what kind of enterprises have been supported? What sectors of interventions are mainly taken up by women/immigrants/senior workers?</p> <p><i>Results and impacts:</i> What are the main benefits stemming from interventions on the ground? Does the presence of gender oriented supports/services for female enterprises help reduce their mortality rates and/or increase female enterprises start ups and employment? Which groups of women/immigrants/senior workers benefit the most (least)? What measures appear to be particularly effective for women immigrants/senior workers business start ups (the provision of training, of technical assistance and services, of financial support, etc.)? What are the main positive unexpected effects (for example: new areas of intervention, increased employment, product/process innovation, new services provided at the local level), what are the negative ones (low take up rate, high firms mortality, high gender segregation, high expected deadweight effects, etc.)?</p> <p><i>Sustainability:</i> Are the interventions sustainable at the local/national level? What conditions are necessary to consent sustainability?</p> <p><i>Utility:</i> Do the results/impacts obtained correspond to the local needs?</p> <p><i>Implementation and Strategy:</i> Which implementation conditions supported (limited) the observed results? Were the relevant stakeholders involved? Which selection criteria were put in place to support entrepreneurship? What are the interactions with existing “ordinary” national/regional/local policies and services? Did the intervention involve other structural funds (ESF, EAGGF, FIGF)? Did this enhance the results?</p>
Developing and enhancing local infrastructures at the urban and regional level	Financing care infrastructures for children, the elderly, the disabled	ERDF interventions may have a potential <i>medium/high indirect impact on gender equality</i> increasing and supporting reconciliation of family and working life and improving the quality of life for both women and men.	<p><i>Outputs:</i> Which services have been supported? Who are the main suppliers (private firms, non profit organisations, public-private consortia, etc.)? Who are the main users? Did the measure achieve the target? Have the needs of women/older people/migrants been considered (opening hours, accessibility)?</p> <p><i>Results and impacts:</i> what are the main benefits stemming from interventions on the grounds? Did the ERDF intervention in care infrastructures support women/immigrants/senior workers labour participation and employment at the local level? Did the support for care services help to reduce population outflows and increase the attractiveness of the local area (in relation to living conditions</p>

Broad areas of intervention	ERDF interventions	Working hypothesis on the potential effects of ERDF interventions on gender equality and demographic changes	Research questions to be tested in the case studies
		ERDF interventions may have a potential <i>medium/high indirect impact on the adaptation to demographic changes</i> (population ageing and depopulation).	<p>for all, attracting young families with children, reducing isolation for older people, reducing depopulation trends, increasing employment opportunities, etc.)?</p> <p>What are the main (positive/negative) unexpected effects (for example: new economic activities activated by the creation of care services, improving professional qualification, creation of new networks and partnerships, etc.)?</p> <p><i>Sustainability:</i> Are the interventions sustainable at the local level? What conditions are necessary to consent sustainability?</p> <p><i>Utility:</i> Do the results/impacts obtained correspond to the local needs?</p> <p><i>Implementation and Strategy:</i> Which implementation conditions supported (limited) the observed results? Were the relevant stakeholders involved? What are the interactions with existing “ordinary” national/regional/local policies and services? Did the intervention involve other structural funds (ESF, EAGGF, FIFG)? Did this enhance the results?</p>
	Financing and adapting transport infrastructures	ERDF interventions extending and improving the accessibility of transport infrastructure may have <i>medium/high indirect impact on adaptation to demographic changes</i> and to <i>gender equality</i> , supporting population mobility and reducing the isolation of women, the elderly, the disabled and immigrants; avoiding the population decline in rural areas and the congestion of urban areas.	<p><i>Outputs:</i> What kind of transport infrastructures has been implemented (roads, rail, public transport, etc.)? What areas do they reach? Has accessibility by women and older people been considered? Who are the main users of transport infrastructure? In which context (urban / rural) was the project located? How was the financial and physical performance? Were the target achieved?</p> <p><i>Result and impacts:</i> Did ERDF interventions help to improve the population mobility and reduce the economic and social costs associated to mobility/migration?</p> <p>Do they help in reducing depopulation in peripheral/rural/internal areas and congestion in urban/coastal areas?</p> <p>Which groups of population benefit the most/least? Does the support of transport infrastructure increase the attractiveness of regions (in relation to reduction in mobility costs, increase in tourism, reduction in pollution, etc.)?</p> <p>What are the main unexpected effects (for example: encouraging mixed use development in areas near the transport infrastructure; higher accessibility to social and public services; increasing housing costs,...)?</p> <p><i>Utility:</i> Do the results/impacts obtained correspond to the local needs?</p> <p><i>Sustainability:</i> Are the interventions sustainable at the local level? What are the necessary conditions</p>

Broad areas of intervention	ERDF interventions	Working hypothesis on the potential effects of ERDF interventions on gender equality and demographic changes	Research questions to be tested in the case studies
			<p>for sustainability?</p> <p><i>Implementation and Strategy:</i> What implementation conditions support/limit the observed results? Were the relevant stakeholders involved in design and implementation? What are the interactions with existing “ordinary” national/regional/local policies and services? Did the intervention involve other structural funds (ESF, EAGGF, FIFG)? Did this enhance the results?</p>
	<p>Financing infrastructures in the framework of active ageing policies (lifelong learning, health, ICT, etc.) and human capital enhancement</p>	<p>ERDF intervention may have a <i>medium – high direct and indirect impact on adaptation to demographic change and gender equality</i> by supporting active ageing and female human capital, reducing the isolation of disadvantaged population groups (women, the elderly, the disabled, immigrants, ...), improving health and living conditions.</p>	<p><i>Outputs:</i> What kind of interventions has been implemented and what are their outputs? Have accessibility (in relation to opening hours for example) for women, older people, immigrants been considered? Who are the main beneficiaries? In which sectors of activity and occupations is training carried out? How was the financial and physical performance? Were the targets achieved?</p> <p><i>Results and impacts:</i> what are the main benefits stemming from interventions on the ground? Do the interventions improve the employability of older workers, women and immigrants? Do they improve active ageing (reduction in the inactivity rates among women and older workers)? Which groups of population benefit the most/least? Do these interventions increase the attractiveness of regions (in relation to improving employment conditions, reducing the isolation of peripheral/rural/internal areas, etc.)?</p> <p>What are the main unexpected effects (for example: improving social integration at the local level, attracting firms from outside and supporting business start ups,)? Which measures appear to work more? For which groups?</p> <p><i>Utility:</i> Do the results/impacts obtained correspond to local needs?</p> <p><i>Sustainability:</i> Are the interventions sustainable at the local level? What conditions are necessary for sustainability?</p> <p><i>Implementation and Strategy:</i> What implementation conditions support/limit the observed results? What are the connections with existing “ordinary” national/regional/local policies and services? Did the programme involve the relevant stake holders in design or implementation phase? Did the intervention involve other structural funds (ESF, EAGGF, FIFG)? Did this enhance the results?</p>

Broad areas of intervention	ERDF interventions	Working hypothesis on the potential effects of ERDF interventions on gender equality and demographic changes	Research questions to be tested in the case studies
Supporting local development and the renewal of urban and densely populated areas	<p>Financing basic services for the local economy and population</p> <p>Financing renovation and the development of rural and urban areas</p>	ERDF interventions may have a potential <i>medium/high indirect impact on demographic changes</i> tackling urbanisation and rural depopulation.	<p><i>Outputs:</i> What kind of interventions has been implemented, and where, and what are their main outputs? Have the needs of women, older people, immigrants been considered? Who are the main beneficiaries of the interventions? How was the financial and physical performance? Were the target achieved? Were the projects innovative in the local context?</p> <p><i>Results and impacts:</i> what are the main benefits stemming from interventions on the ground? Do the interventions improve the living conditions and the development of the local economy? Do interventions contribute to a better balancing between urbanisation and rural depopulation, by attracting (or maintaining) young generations? Which groups of the population benefit the most/least? What are the effects on women, immigrants, young and older people? Do these interventions increase the attractiveness of the intervention areas (in relation to improving housing and living conditions, attracting new families, attracting new firms, tourism, etc.)?</p> <p>What are the main unexpected (positive/negative) effects (for example: improving social integration at the local level, supporting business start ups at the local level, increasing housing prices, displacing original population)?</p> <p><i>Utility:</i> Do the results/impacts obtained correspond to local needs?</p> <p><i>Sustainability:</i> What are the necessary conditions for sustainability? Are the interventions sustainable at the local level?</p> <p><i>Implementation and Strategy:</i> What implementation conditions support the observed results? What are the connections with existing “ordinary” policies and services? Did the programme involve the relevant stake holders in the design and implementation phase?</p> <p>Did the intervention involve other structural funds (ESF, EAGGF, FIFG)? Did this enhance the results?</p>

4. The case study methodology: an integration (Task2)

4.1 Aim of the case studies

The aim of the case studies is to provide an analysis of the performance of ERDF interventions within the selected 12 regions when supporting gender equality and enabling adaptation to demographic change. More specifically the case studies are aimed at:

- providing factual evidence about results and impacts (expected and unexpected; direct and indirect) of the ERDF measures addressing gender equality and adaptation to demographic change;
- testing/validating the hypotheses on the expected impacts, as formulated in task 1, concerning ERDF interventions which generate effects in terms of gender equality and adaptation to demographic change.

The present chapter integrates the methodology for the case studies presented in the Inception Report, by providing details on the organisation of the case studies and on the data collection plan, while the template for the country experts is presented in Annex V.

4.2 Methodology

The impact assessment exercise carried out in task 1. 4 is the starting point for identifying the measures and interventions of each OP which could have had relevant impacts in terms of gender equality and adaptation to demographic change in the 12 selected regions.

The research questions to be addressed and the working hypotheses to be tested by the case studies were presented in the previous chapter, and they are derived from the literature review and the first assessment of the regional OPs.

The proposed methodology for the regional case studies includes two different steps:

- Data gathering and analysis of the existing available data at the European/national and local level;
- Data gathering and analysis on the field: data on outputs and results coming from the regional monitoring systems will be integrated with semi structured interviews, focus groups, survey on the beneficiaries and specific Project's site visits. The aims of these on the field activities are:

- gathering the information about results/ impact when not available from the existing data (mainly from the monitoring system);
- in depth analysis of specific topics emerging from the desk analysis;
- identifying good practices.

Evidence for the case studies will be collected on the basis of the data collection plan presented hereafter.

An integrated template (see Annex V) will provide guidance for the national expert on: the data collection, field analysis, interviews and the Table of contents for the final report. The template is expected to be user friendly for the national expert, who will have a single reference document plus the assistance by the core team to organize his/her work and provide the final deliverable.

The Table of contents for the case study reports will be the following:

1. REGIONAL CONTEXT

- 1.1. *General economic and social context*
- 1.2. *Overview of demographic change in the Region*
- 1.3. *Overview of Gender equality in the Region*
- 1.4. *The Regional performance and strategies with respect to the national context*

2. DIRECT AND INDIRECT EFFECTS OF ERDF INTERVENTIONS ON GENDER EQUALITY

- 2.1. *Analysis of the regional strategy and implementation procedure*
- 2.2. *Output*
- 2.3. *Results and Impacts*
- 2.4. *Complementarities with ESF, EAGGF⁵⁸ and FIFG⁵⁹*
- 2.5. *Sustainability*
- 2.6. *Lessons learned and policy implications*

3. DIRECT AND INDIRECT EFFECTS OF ERDF INTERVENTIONS IN ENABLING ADAPTATION TO DEMOGRAPHIC CHANGE

- 3.1. *Analysis of the regional strategy and implementation procedure*
- 3.2. *Output*
- 3.3. *Results and Impacts*
- 3.4. *Complementarities with ESF, EAGGF and FIFG measures*
- 3.5. *Sustainability*
- 3.6. *Lessons learned and policy implications*

4. SUMMARY OF THE MAIN FINDINGS

5. BIBLIOGRAPHY

6. LIST OF PEOPLE INTERVIEWED

⁵⁸ European Agricultural Guidance and Guarantee Fund.

⁵⁹ Financial Instrument for Fisheries Guidance.

ANNEX

List of charts

List of tables

4.3 Organisation and mini case studies

The case studies will be the core of the field work for the present evaluation exercise.

The **country experts** will be in charge of carrying out the case studies, under the supervision of the **core team** and following a common template. The core team will be coordinating the network of experts, providing guidelines and clarifications when necessary. Moreover, the core team will provide a common set of statistical data and information to the country experts, as coming from the statistical analysis and regional literature review carried out in task 1.

The template for the case study will be discussed with the Steering Committee and will later be tested with the pilot cases.

Besides the regional case studies the ToRs asks for **mini-case studies** to be carried out. They are intended to be a brief presentation of a good practice identified on field.

The methodology proposed for the mini-case studies is the following: each country expert will be requested to propose 2-3 good practice examples which could be either a specific implementation approaches or a projects. The good practices are requested to have the following features:

- the idea and/or the implementation should be innovative in relation to project content and/or the implementation approach;
- the result and impact regarding the issues of interest must be evident;
- the transferability and sustainability of the innovative idea and/or implementation should be evident.

The country experts will provide the good practice examples in the format defined by DG REGIO database of good practices. The core team will select a short list of cases on the basis of their representativeness in terms of typologies of projects and approaches, regions. The list will be submitted and discussed with the Scientific and Steering Committee. The core team will make the final selection (6 projects – no more than one example for Region) on the basis of the suggestions emerging from the Scientific and Steering Committee.

The format for the mini case studies is the one defined by the Commission at the following link: (http://ec.europa.eu/regional_policy/cooperation/interregional/ecochange/studies_en.cfm?nmenu=5).

4.4 Data collection plan

The data collection plan is based on a twofold approach:

- a) a set of basic information, consistent and homogeneous at the EU-27, provided by the core team to all the country experts will constitute the initial input for the case studies; and
- b) region-specific information as the main input of the case study exercise.

The case studies will take advantage of the analysis already carried out within task 1 and presented in the previous chapters. The information will be collected in two different steps. During the first step the core team will conduct a desk research in order to provide the country experts with a bulk of consistent and organized set of statistical and qualitative data (coming from the literature review, the cluster analysis and the GIA exercise). The Country experts will therefore be provided with an organised analytical framework, from which they will develop the regional cases. The information will mainly concern the Policy, Economic and Social Context. During the second step, the Country experts will collect data and information on the field. The information will be related to the output/ result and impact indicators of the Programs. Each national expert will be provided with a Data Collection Kit containing: the Case Study Template, the Interview Guide, Collection Data Fiches, the Commission's Database with Program Indicators (Objectives 1 and 2 – Work package 2: Data Feasibility study).

Qualitative information will come mostly from semi-structured interviews to independent evaluator(s), representatives from stakeholders' associations (women, immigrants, older people and local communities associations), academics and experts, officials in charge of policies aimed at Gender Equality / Demographic Change at the national/ regional level (depending on the degree of decentralization), main official(s) at the Managing Authority of ERDF interventions. It is expected that up to 5-6 interviews will be realized for each case study on the basis of the Interview Guide.

Quantitative information is related to the Program indicators (output, result and impact) which will come from the Regional Monitoring systems, monitoring and evaluation reports, Annual Implementation Reports. The Country experts will also verify the coherence of the collected data with those included within the Commission's Data Base on ERDF Program Indicators (Objectives 1 and 2 – Work package 2: Data feasibility study).

Whenever possible, the Country experts will collect information at December, 31st 2007. If this information is not available, the country experts, supported by the core team, will carry out a field analysis, using different methodologies depending on the nature of the measure under evaluation. The following list includes some of the methods which are likely to be used:

- a) Focus groups with the main stake holders.
- b) Visits on the main Projects' sites (in case of infrastructures).
- c) Surveys of the beneficiaries (when relevant: for example in the case of measures supporting business start ups and SMEs).

The Country experts are asked to organize and keep the outcome of their activities in specific "Data fiche". The Data Fiche will include:

- a Measure Data Fiche containing a short description of the measure (objectives, implementation arrangements, and beneficiary) and the financial - physical indicators;
- a Project Data Fiche providing a short description of the project (location, budget, beneficiary) and its main output, result and impacts.

The core team will verify the Data Fiches received by the Country experts and collect them in a Data Base which will be available with the final Report. The Data Fiches will be elaborated by the core team on the basis of the experience of the two Pilot cases.

5 Upcoming activities

After the discussion, revision and approval of the present report, the forthcoming activities will proceed as planned, taking into consideration the indications emerged during the discussion with the Steering Committee. In particular, the activities will focus on Task 2.

In the first part of Task 2 the two pilot regional case studies will be conducted on the basis of the methodological template proposed. Because of easiness in personal contacts and the direct knowledge of the two OPs, the two proposed regions are Liguria (IT) and Nord-pas-de-Calais (FR).

The pilot cases reports will be delivered by the 25th of July 2008 (this deadline reflects the postponement of one week of the deadline for the delivery of the present report). However, should the approval of the present report take more time than foreseen (it can be considered mid June as a borderline date), it will be discussed with the Steering Committee whether the deadline of end of July remains realistic, given also the proximity of the summer holidays which will make it difficult to arrange the interviews to stakeholders and relevant actors. The evaluation team will do its best to respect all the deadlines and avoid any postponement of future activities, if not detrimental for the quality of outputs to be produced.