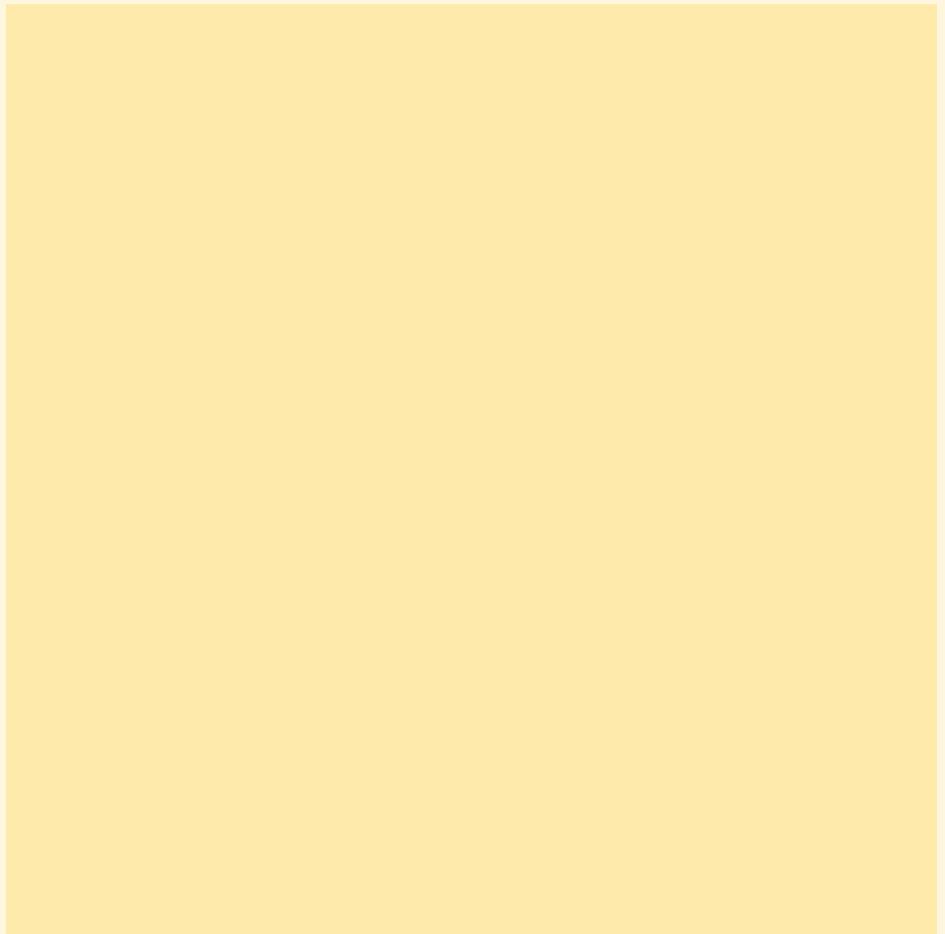




European Foundation for the Improvement of Living and Working Conditions

# Promoting gender equality in the workplace



Promoting gender equality in the workplace

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European Foundation for the Improvement of Living and Working Conditions

# Promoting gender equality in the workplace

Etta Olgiati and Gillian Shapiro

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## Preface

Corporate strategies are increasingly recognised as being critical to the achievement of gender equality in the workplace. Promoting an equality-sensitive approach to human resource management remains, however, a major challenge for companies and for policy makers.

In a series of reports on equal opportunities and collective bargaining in the European Union (1996-1999), and on gender and working conditions in the European Union (1998), the Foundation has highlighted the role of human resource policy in promoting gender equality. Faced with a persisting lack of data on company plans for equality programmes and for incorporating an equality perspective into all corporate policies, the Foundation commissioned a research project on promoting gender equality in the workplace in 1999.

This report describes and assesses the impact of corporate equality strategies on gender equality in the workplace in seven EU Member States. It outlines the reasons for the success or failure of equality programmes, and draws up recommendations for decision makers. The research findings will undoubtedly stimulate debate in this previously neglected area.

Raymond-Pierre Bodin  
Director

Eric Verborgh  
Deputy Director





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# Chapter 1

# Introduction

In 1999, the European Foundation for the Improvement of Living and Working Conditions commissioned a research project entitled, *Promoting Gender Equality in the Workplace*. The aim of the project was to analyse the impact of human resource management on equal opportunities (here referring to gender) at corporate level, using case-study research.

It was established that the project should emphasise the role of corporate strategies and equality plans aimed at promoting equal opportunities in the workplace. 'Equality plans' were defined by the Foundation as plans designed by management to incorporate an equality perspective and programme into all company policies.

The objectives set out by the Foundation were:

- to identify and describe corporate equality plans;
- to evaluate their impact on gender equality;
- to draw up recommendations aimed at promoting gender equality in the workplace.

For case-study purposes, seven countries were identified by the Foundation: Finland, France, Germany, Italy, the Netherlands, Spain and the United Kingdom.

The choice of countries does not reflect any special position, such as the state of advance these countries might represent with regard to the topic, but an effort was made to ensure a fairly equal geographical distribution within the EU.

The authors of the national reports were:

<b>Finland:</b>	Kaisa Kauppinen and Ansa Ojanlatva Institute of Occupational Health, Department of Psychology
<b>France:</b>	Jaqueline Laufer Groupe HEC-Departement MRH
<b>Germany:</b>	Anni Weiler Working World Research and Consult
<b>Italy:</b>	Etta Olgiati, Maria La Salandra and Elena Rapisardi Fondazione Regionale Pietro Seveso
<b>Netherlands:</b>	Kea G. Tijdens and Carole Sombroek AIAS-Department of Economics, University of Amsterdam
<b>Spain:</b>	Maria Carme Alemany Centre d'Estudis Dona i Societat
<b>United Kingdom:</b>	Juliet Webster Research and consultancy in work and employment

## Defining gender equality in the workplace

The definitions relevant to this research that can be found in the European Commission's glossary on equal opportunities (European Commission, 1998a) include:

**Gender equality:** The concepts that all human beings are free to develop their personal abilities and make choices without limitations set by strict gender roles; and that the different behaviours, aspirations and needs of women and men are considered, valued and favoured equally.

**Gender equity:** Fairness of treatment on the basis of gender, which could mean either equal treatment or treatment that is different but considered equivalent in terms of rights, benefits, obligations and opportunities.

**Equal opportunities for women and men:** The absence of barriers to economic, political and social participation on grounds of sex.

**Equal treatment for women and men:** The absence of discrimination on grounds of sex, either directly or indirectly.

Taken together, these definitions emphasise the importance of both not discriminating and enabling all women and men to reach their full potential in the workplace. This does not, of course, mean that all women and men employees should be treated the same. It is inevitable that men and women of different ages, backgrounds, areas of specialisation and so on, will – for example – require access to different training and development in order to reach their potential.

For the purposes of this report, our interpretation of gender equality in the workplace (incorporating the terms provided by the European Commission's glossary) may be most succinctly expressed as:



‘creating an organisational environment that enables all employees to reach their full potential and to be fairly rewarded for this, without discrimination on any basis.’

## Guide to the report

The report can be broken down as follows:

- *The context.* Chapters 1-2 describe the background to the research: the changing European and national contexts, from both a policy-making and a company (business) perspective. It was important that the report consider the results and make recommendations in the light of this. We therefore begin with an overview of the changing European landscape as regards the development of gender equality in the workplace. The issues raised are considered closely again in drawing final recommendations from the research in the concluding chapter. The research methodology, including the hypotheses, research framework and analytical model, is outlined in Chapter 2.
- *Deconstructing approaches to gender equality in the workplace.* Chapters 3-6 examine the 21 case studies from the seven countries in depth by analysing them across four dimensions, namely:
  - The motives and influences affecting gender equality action (Chapter 3).
  - The ‘content’ of equality action (Chapter 4).
  - The process for implementing equality action (Chapter 5).
  - The outcome of equality action (Chapter 6).

Examples from the national reports are used to illustrate the main points, a summary of which is included at the end of each of these four chapters.

- *Working towards sustainable gender equality in the workplace.* Chapters 7-9 reconstruct the data to produce meaningful conclusions and recommendations for both policy makers and organisational equality practitioners, with a view to promoting further progress. This is done first by linking the dimensions examined in Chapters 3-6, so as to better understand how they interrelate, by means of a **dynamic equality model**. The model demonstrates how different approaches to developing gender equality in the workplace, across each of the dimensions analysed, have a cumulative effect, producing different equality outcomes at different levels. While it needs further testing, this model – presented in Chapter 7 – has the potential to help equality practitioners and researchers to identify:
  - why an organisation is at a particular stage in the development of equality;
  - the different choices available and challenges to be faced in developing equality further and sustaining it over time;
  - why the development of equality may be blocked.

This information can also be used by policy makers to track the impact of equality policies at company level, helping to identify the tools and methods that may be required to bridge the gap between policy and practice.

- *Conclusions.* Chapter 8 presents the overall conclusions of the research. This includes identifying the critical elements needed to achieve and sustain gender equality in the workplace. Recommendations relevant to policy makers and the social partners are made in order to further the development of gender equality in the workplace.

## Equality in a changing Europe

The remainder of this chapter provides an overview of the background to the research: a changing European and global organisational, labour market, social and legislative landscape. It attempts to show the implications of these changes, and the role played by research, on gender equality action in the workplace.

Labour market demographics in the European Union are undergoing a radical transformation, as are the needs and aspirations of workers. The effects of these shifting demographics, new technologies and the globalisation of the economy are sweeping across the EU.

In Europe and globally, the labour market is being directly affected by the shift from a manufacturing economy to one based on services and information technology – one in which knowledge is becoming a primary ‘product’. There is a growing need for more educated and more skilled workers. At the same time, the characteristics of the European labour force are drastically changing (Norton and Fox, 1997):

- The population and the workforce is ageing – faster in Europe than in the US.
- More women are entering the labour market than ever before.
- There are more dual-career couples (both working) than ever before.
- Ethnic minority communities (and therefore workers) are growing.
- The pool of labour overall is shrinking. Due to falling fertility rates, the gap left by retiring workers will be filled not through replacement growth as has hitherto been the case, but by two different groups: (a) immigrants and (b) those previously under-represented in the labour market.

Given the demand for high skills in a shrinking labour pool, it is important that employers build on the strengths of non-traditional labour and work to meet employees’ changing needs and aspirations.

There is growing evidence to suggest that management practice that does not build on the advantages offered by employee diversity is becoming a high-risk approach. Increased diversity inevitably goes hand in hand with an increasingly global economy, and those organisations that effectively exploit this diversity (internal and external) may be facing a very different future to those who do not (Norton and Fox, 1997; Thomas, 1996; Shapiro, 2000).

### **An unprecedented challenge for companies**

Companies in Europe are operating in a rapidly changing, developing industrial context. Most OECD countries are faced with market maturity and increased competition and fragmentation of markets, along with customers who are demanding more customised products (Maskell, 1999). In addition, the basis on which firms compete has begun to move away from the traditional ‘hard’ factors, such as access to physical and financial resources; economies of scale; and expenditure on research and development, towards ‘soft’ factors, including core competencies,

speed to market, reputation and service (Hamel and Prahalad, 1994; Porter, 1990). Many companies now seek to differentiate themselves on the basis of added value, high quality and a unique value proposition for customers, rather than low costs. This highlights the importance of attracting, developing and retaining a skilled and committed workforce:

‘The nature of work and the organisation of labour processes are undergoing fundamental change. Human labour has once more become the centre of attention. The focus has switched to human beings and human creativity, which are no longer assumed to be replaceable by automation and computer programming.’ (Littek and Charles, 1995, p. 4)

It should be noted that companies’ motives for making use of labour’s tacit skills, energy and creativity are more often related to enhancing productivity and maintaining or improving a competitive position in the marketplace than a wish to humanise work, enhance the quality of working life or provide equal opportunities. However, achieving the required levels of innovation, quality, customer satisfaction and added value now depend more on the creativity of labour. It is also widely believed that creativity and worker cooperation can no longer be achieved through control and coercion, but depend instead on increased collaboration throughout the enterprise (Ahlbrandt *et al*, 1992, pp. 91-8; Ketchum and Trist, 1992; James, 1991). Thus, organisational change cannot be effectively achieved if it is played out as a power game between management and labour, the gain of one coming at the expense of the other. New forms of work organisation need to be designed and implemented to meet the needs of both the organisation and its diverse workforce.

European businesses are faced with a human resource challenge that is virtually unprecedented. They must maintain or enhance productivity with fewer workers, who differ from their predecessors and from each other in terms of values, work ethic, expectations and motives, as well as in their ethnic, sociocultural and professional backgrounds. This must be accomplished at a time when the skills demands of many jobs are increasing; the structure of organisations and the manner in which work is done is undergoing remarkable change; and international competition for workers with the new skills is intensifying.

### **The position of women**

An overview of the situation of women in EU labour markets highlights both good and bad news (European Commission, 2000a).

- Women appear to be the main beneficiaries of the employment created in 1999. Female employment rates in the EU reached 52.5% in 1999, compared to 71.5% for men. The gender gap has therefore shrunk to 19% compared with 24.5% at the start of the 1980s.
- Women’s average educational level is tending to increase faster than men’s. Some 26% of women aged 25-29 had a university degree or equivalent in 1999, as against only 22.5% of men.
- Women’s employment starts to decrease when they have young children; whereas men aged 20-44 are *more* likely to be in employment when there is a child in the household.

- Gender segregation remains a core problem. This is the case even in those countries that have achieved relatively high female employment rates (e.g. Finland, Sweden and Denmark).
- It should be noted, however, that female employment remains concentrated in a few sectors: over 60% of women work in just six sectors, which have been expanding in the past few years. Women appear to outnumber men in higher-skilled occupations (e.g. as professionals and technicians), but the number of men in supervisory activities still remains higher.
- Evidence suggests that women tend to be in less senior positions than men within broad occupational groups, and they therefore tend to progress less far in their careers. This is supported by evidence from Eurostat's *Structure of earnings survey* for 1999, which indicates that the gap between men's and women's income is particularly pronounced at the top end of the scale, among men and women with the highest earnings (European Commission, 2000b). This appears to confirm the much-quoted view that there is a 'glass ceiling' restricting women's career prospects relative to men's, preventing them from attaining equal levels of seniority, responsibility and pay.
- Women are paid less than men: there is still a 15% gap in average earnings. The gap is greater (25%) in the private sector than (9%) in the public sector (European Commission, 1998a).

### **The EU equality framework**

The principle of equality and non-discrimination on grounds of sex plays a fundamental role in Community law and has been a driving force in the development of national anti-discrimination legislation within the Member States. Starting with Article 119 of the Treaty of Rome (Article 141 Treaty of Amsterdam), which enshrined the principle of equal pay for men and women, the Community has since enacted an extensive body of secondary legislation (directives, recommendations and resolutions). These have focused on equal pay; equal treatment as regards access to employment and terms and conditions of employment; equal treatment in statutory and occupational social security schemes and equal treatment for self-employed workers. Also included have been protection for working mothers, the reconciliation of work and family life and protection against sexual harassment.

At European level, equal opportunities policy has been developed through a series of Community Action Programmes. These have been aimed at enhancing women's rights in terms of employment and pay; promoting equality by means of 'positive action' in favour of women; and promoting female employment through initiatives in education and training, new technologies, social security, the reconciliation of work and family life, and culture. The Fourth Medium-Term Community Action Programme on equal opportunities for men and women (1996-2000) has further extended equality strategies and policies in Member States, reinforcing the principle of mainstreaming 'to promote equal opportunities for women and men in all actions and policies at all levels' (European Commission, 1996a)

The European Framework for gender mainstreaming adopted by the Commission in 1996 is now legally and institutionally formalised in the new Treaty of Amsterdam. In Article 3, it states that 'the Community shall aim to eliminate inequalities and to promote equality between women and men in all its activities.'



Article 137 of the Treaty of Amsterdam establishes that:

‘... the Community will support and complement the action of Member States in the following areas: ... equality between men and women regarding their opportunities in the labour market and fair treatment in employment.’

The European Council of Lisbon has invited the Commission and the Member States to further develop equal opportunities strategies and policies, laying down:

- qualitative objectives, such as furthering all aspects of equal opportunities in employment policies (including reducing occupational segregation); ensuring equal access to the knowledge-based economy and ICT; and helping to reconcile work and family life;
- quantitative targets, such as raising women’s employment rate from 51% to more than 60% by 2010 (European Commission, 2000a).

### **The new EU equality strategy**

Unlike previous Community Actions on equal opportunities, future work on gender equality will take the form of a comprehensive strategy which:

‘will embrace all Community policies in its efforts to promote gender equality, either by adjusting policies (proactive intervention: gender mainstreaming) and/or by implementing concrete actions designed to improve the situation of women in society (reactive intervention: specific action).’

(European Commission, 2000a)

In its efforts to bring about the structural change required to achieve gender equality, the Commission has identified five interrelated fields of intervention for its framework strategy:

- economic life;
- equal participation and representation;
- social rights;
- civil life;
- gender roles and stereotypes.

Within each of these areas a range of operational objectives and related actions are highlighted, so as to ‘chart the course towards gender equality over the next five years’. Some of these are likely to have a direct impact on equality in the workplace, including:

- improving the use of structural funds to promote gender equality (e.g. improving the ‘mainstreaming’ of gender equality and supporting the desegregation of the labour market via Community initiatives such as *Equal*);
- developing strategies to encourage gender mainstreaming in all policies that have an impact on the position of women in the economy (developing social dialogue with senior management in European companies on their contribution to gender equality; creating an equality label or prize for companies that have developed good practice in promoting gender equality);
- improving the gender balance in economic and social life (monitoring and evaluating the transition from education and training to working life; recruiting and developing women as

potential senior managers; establishing and monitoring statistics on women in decision-making roles in business, industry, social partner organisations and major NGOs);

- improving knowledge and monitoring as regards the relevant legislation in the social sphere;
- overcoming gender stereotypes.

In the fight against social exclusion, European equality policy is also widening to take explicit account of the diverse forms discrimination can take. In addition to a longstanding commitment to gender equality, the Commission adopted a package of proposals to combat wider discrimination on 25 November 1999. The proposals are based on Article 13 of the EC Treaty, which provides the Community with new power to adopt measures to combat discrimination on grounds of sex, racial or ethnic origin, religion or belief, disability, age or sexual orientation. The preparatory documents emphasise the need for the programme to take into account the differences, as well as the similarities, in different groups' experience of discrimination as defined at national level, and in the methods developed to tackle it.

### **From policy to action: the need for a pathway**

The key challenge facing gender equality in the workplace is to build a clear pathway between European/national policy aspirations and practical outcomes on the ground. The path between policy and practice is inevitably a complex one. As already outlined above, the pace of change facing organisations is rapid, and the competitive challenges great. There is a need to ensure that gender equality is made central to all. It therefore has to be reflected in discussions, policy making and the development of European programmes and strategies.

The role of research is important in mapping the path – but only if the results are continuously built on and disseminated both at policy level and in companies. Social partnership at European level has a significant role to play here in ensuring that two fundamental elements are covered: firstly, that the mechanisms are in place for disseminating good practice and fuelling discussion and exchange between and within groups of policy makers and equality practitioners; and secondly, that tools (e.g. models, programmes and training) that can achieve practical improvements as regards key problematic issues are developed and implemented.



## Chapter 2

## Methodology

This chapter outlines the research framework and how it was developed by the authors, and presents the research questions and the hypotheses set. It provides some detail on the case companies selected by the national researchers, and discusses the challenges and limitations of the methodology.

### **Background**

The research framework has its roots in other case-study research conducted by the authors during the 1990s (Olgiati and Shapiro, 1999). This highlighted some key issues to be explored further in the Foundation's project.

- Equality is not just an ethical issue. Case studies have shown that equality action at company level can benefit women, men and the organisation as a whole.
- Equality actions in organisations are often marginalised, with the result that ownership and responsibility for equality on the part of *all* employees is low, and the impact of equality action on the whole organisation is limited.
- Monitoring, assessing and measuring the impact of equality action on women, men and the organisation as a whole is often a neglected area.
- Organisational change provides a potential opportunity for overcoming gender segregation, provided that equality is explicitly considered in planning and implementing change. In some organisations, however, it can also pose a threat to equality budgets, action and progress as a result of merging, restructuring, downsizing and so on.

The research referred to above showed that organisational approaches to equality are influenced by the European legal and policy contexts; by changes in national legislation; and by market conditions and the labour market. It was therefore important that the research framework

consider the relationships between European policy, the national contexts – with their different opportunities, constraints and resources – and organisational action as regards equality. The authors argued that these relationships should be considered in two main ways. Firstly, the research should provide a greater understanding of whether and how equality policy (macro level) is being implemented at micro level. Secondly, several micro-level conferences, seminars and reports have also clearly shown that the development of good practice in the workplace can positively influence policy and performance at macro level. (In some cases, employers and trade unions have been shown to be in the vanguard as regards measures to redress gender imbalance, often acting in advance of and beyond any legislative requirements or national policies.)

### The research questions

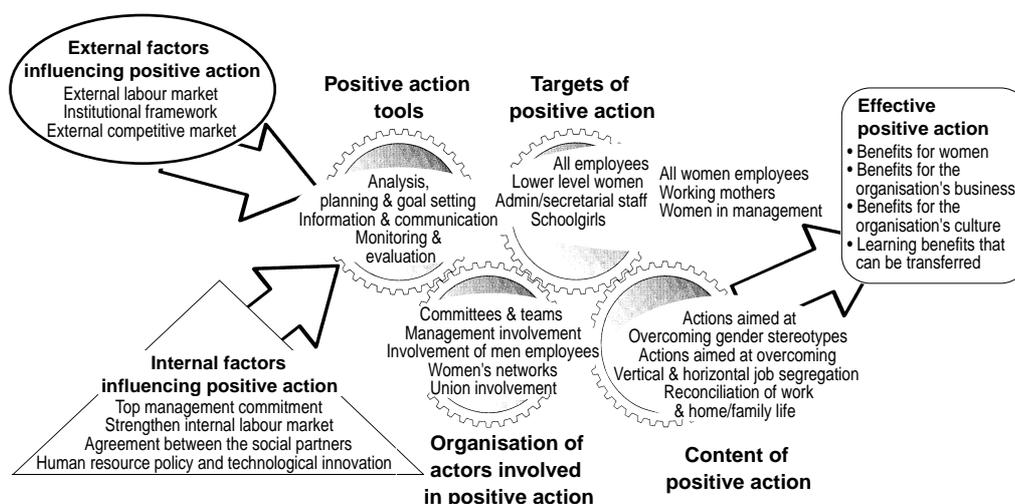
An overview of European policy and the research conducted to date highlighted the following key questions:

- What are the factors that motivate and influence organisations to design and implement equality policies, procedures and practices?
- What are the factors that influence the sustainability of gender equality over time?
- How are effective equality policies, procedures and practices implemented?
- Is gender equality meaningful at the level of the individual employee? If so, in what way?

### The ‘equality machine’

The research framework used for this project built on an existing analytical model developed to evaluate case studies on organisational approaches to equality in Europe, and compiled in partnership by Olgiati and Shapiro. The model had already been tested and validated, having been used initially to evaluate 19 equality experiences from organisations in 12 EU Member States, followed by a further 46 case studies from across the 15 Member States.

Figure 1 The equality machine





The elements included in the initial analytical framework can be represented as an ‘equality machine’ (Figure 1). The factors (both internal and external to the organisation) that were found to motivate companies to initiate equality programmes and actions are represented as inputs. The actors and steps involved in this process, the major content areas of the different programmes/initiatives, and the various groups targeted are all represented as cogs turning inside the machine. The final output illustrates that organisations have experienced benefits from equality and positive action, not only in improving the quality and quantity of women’s work, but also in increasing product/service quality and efficiency.

It was clear, however, that this analytical framework needed to be re-evaluated and developed further. Firstly, while a method for analysing approaches to gender equality in the workplace was required, the complexity of the interplaying factors demanded a more flexible approach than the equality machine allowed. Secondly, consultation with both equality practitioners in companies and national equality experts<sup>1</sup> helped to identify the following issues, which were built into the project’s research framework in order to evaluate workplace equality programmes:

- the impact of increased competition;
- changes in the organisation of work and ICT;
- the impact of organisational cultures;
- positive flexibility and the reconciliation of work and personal life;
- the ‘mainstreaming’ of gender equality in the workplace;
- assessing the outcome of gender equality action.

### **The research framework**

The research framework was developed by the authors and presented in draft form to the national researchers. Following an agreed period and a joint meeting where questions and queries could be raised, the framework was amended and finalised.

Extracts from the full research framework, guidance on the questions to be asked and possible sources of information are presented in Appendix 2.

The framework was designed to try and elicit sufficient national and case-study background information for the authors to analyse the relationship between national policy; the national legislative, cultural and social contexts; the specific organisational context and approach to equality; and the European policy agenda. Each of these areas is complex and the relationship between them is naturally influenced by different factors. Indeed, isolating independent factors that may influence different equality outcomes is highly problematic, and tends to differ from case to case as well as between countries.

---

<sup>1</sup> Consultations with national experts and equality practitioners were held in two network meetings. The first, ‘Developing equality in companies: objectives and tools for the future’ was held in Milan in 1998 with seven experts from five Member States and nine equality practitioners from seven Member States. The second, ‘Innovative work organisation and equality: improving practice and exchange across Europe’ was held in Copenhagen in 1999, with 13 practitioners from 12 Member States and two equality experts.

The research framework was aimed at deconstructing the pursuit of gender equality in the workplace by analysing different elements in depth across four dimensions: the motives behind and factors influencing equality action; the content of equality action; the process for implementing equality action; and the outcome of equality action.

The authors considered it important to receive the national researchers' interpretation of the research data. This was facilitated by each of the national researchers answering five analytical questions on their case studies. These were:

- How can equality action be sustained over time?
- In what areas is most equality action focused?
- What is the impact of equality action?
- How has effective equality action been achieved?
- What is the relationship between equality and organisational change?

The authors then drew on the details provided to construct a European cross-analysis of the case-study results.

### Case-study criteria

As regards appropriate parameters, the research framework took into account that the case studies needed to be comparable and relevant across national boundaries, and that the results should contribute to the development of recommendations on promoting gender equality in the workplace.

In this context, the authors decided not to focus on one particular sector as this would not have yielded enough cases showing relevant and innovative equality experiences. Also, while three cases were requested from each country under the terms set by the Foundation, this is still a limited sample in terms of enabling anything representative to be drawn from any one country. Nevertheless, it was important to set both general and specific criteria. After discussion in the overall research group, it was agreed that the set of parameters to be sought in the case studies selected would include the following:

- **Sector:** Cases from services and manufacturing and from the public and private sector can be compared.
- **Type of company:** national/multinational.
- **Size:** In equality research to date, case studies have mostly focused on large organisations. The present research could begin to explore issues perhaps specific to small and medium-sized enterprises (SMEs). Such issues have already started to become the focus of some national programmes seeking to promote gender equality in the workplace, such as *Opportunity 2000* in the UK and *Total E-Quality* in Germany. The research might seek to identify examples of good practice in equality action in SMEs.
- **Duration of experience with gender equality:** Analysing equality action taken at different stages of development can help in compiling more tailored recommendations for firms.



- **Composition of the workforce:** It is important to compare experiences and progress with gender equality in firms that are male dominated, female dominated and gender balanced, in order to consider whether and to what extent workforce composition has an impact on action and results.
- **Union versus non-union:** The internal influences that prompt equality action, and the actors involved, may differ according to the unionisation or otherwise of an organisation.
- **Innovative equality action:** In helping to draw up recommendations for promoting gender equality in the workplace, it is important to focus attention on case studies that reflect good practice and innovation, in order to demonstrate how this can work in practice.

Each national researcher was asked to select three cases on the basis of these criteria, while also considering the state of play of equality in the workplace in the specific national context.

The researchers were also asked to select two cases which, in their national contexts, illustrated innovative equality action, along with a third that might enable a more problematic equality situation to be analysed. The national researchers were free to select their cases on the basis of the agreed parameters. It should also be noted that the Foundation's contract guidelines allowed for case studies recently carried out by the national researchers to be used again for this project provided any missing information was added.

### Case-study characteristics

As Table 1 illustrates, the 21 case studies represent both the public and private sector, and a range of activities from services to manufacturing to hi-tech industry. The majority are large firms (over 500 employees). Just three medium-sized firms (250-500 employees) were studied, two in Spain and one in France (Table 2).

The majority of the organisations (15) are multinational firms, and over half of these (eight) have head offices in other countries (Table 2). This allowed for some analysis of the influence of head office as regards gender equality policies, procedures and practices.

With the exception of the Spanish companies, all the firms are unionised, with differing degrees of partnership in the equality process. Around half (10) are companies with a predominately male workforce. Slightly less (seven, or 45%-55%) have a roughly equal representation of men and women in the workforce (Table 3).

It was agreed in the project group that the case-study companies would remain anonymous. Company names are therefore not used in this report, and identifying characteristics have been removed.

Table 1 Case studies: sector

Country and case	Financial services	Retail	Distribution	Manufacturing	IT	Transport	Public service
<b>Finland</b>							
Case A				✓			
Case B	✓						
Case C							✓
<b>France</b>							
Case A				✓			
Case B				✓			
Case C					✓		
<b>Germany</b>							
Case A						✓	
Case B	✓						
Case C							✓
<b>Italy</b>							
Case A		✓					
Case B					✓		
Case C				✓			
<b>Netherlands</b>							
Case A	✓						
Case B	✓						
Case C				✓			
<b>Spain</b>							
Case A					✓		
Case B					✓		
Case C			✓				
<b>UK</b>							
Case A	✓						
Case B							✓
Case C		✓					
<b>TOTAL</b>	<b>5</b>	<b>2</b>	<b>1</b>	<b>5</b>	<b>4</b>	<b>1</b>	<b>3</b>



Table 2 Case studies: size and type of company

Country and case	National	Multinational	If multinational		Size	
			Head office in case country	Head office abroad	Medium	Large
<b>Finland</b>						
Case A		✓	✓			✓
Case B		✓	✓			✓
Case C	✓					✓
<b>France</b>						
Case A		✓		✓ (Italy)	✓	
Case B		✓	✓			✓
Case C		✓		✓ (USA)		✓
<b>Germany</b>						
Case A		✓	✓			✓
Case B		✓		✓ (USA)		✓
Case C	✓					✓
<b>Italy</b>						
Case A	✓					✓
Case B		✓		✓ (USA)		✓
Case C		✓		✓ (Sweden)		✓
<b>Netherlands</b>						
Case A		✓	✓			✓
Case B		✓	✓			✓
Case C		✓		✓ (USA)		✓
<b>Spain</b>						
Case A	✓				✓	
Case B		✓		✓ (USA)		✓
Case C	✓				✓	
<b>UK</b>						
Case A		✓		✓ (France)		✓
Case B	✓					✓
Case C		✓	✓			✓
<b>TOTAL</b>	<b>6</b>	<b>15</b>	<b>7</b>	<b>8</b>	<b>3</b>	<b>18</b>

Table 3 Gender distribution and unionisation of the workforce

Country and case	Gender distribution			Unionisation	
	Female-dominated	Male-dominated	About equal (45% - 55%)	Unionised	Non-Unionised
<b>Finland</b>					
Case A		✓		✓	
Case B	✓			✓	
Case C		✓		✓	
<b>France</b>					
Case A		✓		✓	
Case B		✓		✓	
Case C		✓		✓	
<b>Germany</b>					
Case A	✓			✓	
Case B			✓	✓	
Case C			✓	✓	
<b>Italy</b>					
Case A		✓		✓	
Case B		✓		✓	
Case C			✓	✓	
<b>Netherlands</b>					
Case A			✓	✓	
Case B			✓	✓	
Case C		✓		✓	
<b>Spain</b>					
Case A		✓			✓
Case B		✓			✓
Case C			✓		✓
<b>UK</b>					
Case A			✓	✓	
Case B	✓			✓	
Case C	✓			✓	
<b>TOTAL</b>	<b>4</b>	<b>10</b>	<b>7</b>	<b>18</b>	<b>3</b>

### Limitations of the research

Given the complexity of the issues involved in developing gender equality in the workplace, the case-study approach as compared with the survey method does allow for more in-depth investigation and comparison. Naturally, however, there are limitations associated with case-study research. The cases cannot, for example, be regarded as representative of the countries they



are drawn from, not just because they are too few in number, but because the research sought examples of specific characteristics, e.g. companies with innovative approaches to equality; or companies illustrative of a problematic equality situation.

The authors were also inevitably restricted in their analysis of the national research projects by variations in the extent and depth of the information the national researchers were able to obtain.

An associated problem was the fact that researchers could re-use existing case studies so long as these met the selection criteria and additional information was collected as necessary. We would argue that this can cause problems, since the depth and analysis of the information does not always match the research guidelines as closely as is the case with the newer case studies, designed specifically on the basis of the guidelines. Moreover, little primary research on gender in companies has been conducted at European level, particularly in the past five years. Given the case research demanded for an in-depth study of the subject, it is important that funds be made available and methodologies developed to facilitate the building of a larger base of knowledge on attaining and sustaining gender equality in the workplace.

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## Chapter 3

## Motives and influences affecting equality action

Previous research has shown that corporate approaches to equality are not based on ethics alone, but have also been influenced by factors at work in organisations' external and internal environments. (Shapiro *et al*, 1995).

'External factors' were defined as those operating in the environment outside the organisation that were recognised as influencing its strategic choices and actions. Those most likely to influence equality were the institutional framework, the industrial relations systems operating in the national context, the external labour market and market conditions.

'Internal factors' were defined as those resources and constraints operating *inside* the organisation that are recognised as influencing its strategic choices and actions. The key factors found to influence equality were: company values and culture, human resource management and social partnership.

The present research confirms that equality action in the workplace is prompted and influenced by various factors at work in the external and/or internal environment. This chapter provides the results of in-depth analysis of these factors, some of which have been highlighted before. It should be noted that while some are common across the different organisations, others appear to be linked to the specific national background, market environment and associated strategies and policies of a particular company.

The evidence from the companies has also enabled a more dynamic overview of the external and internal 'drivers' to equality to be drawn in this project, for at least two reasons. Firstly, in some cases equality action had been in place for a significant period of time. This helps highlight the

influence of the different factors at work in the overall equality process, showing how some may motivate organisations to *initiate* equality action; others contribute to allowing such action to *develop* positively; while still others appear to act as a catalyst to *broaden* and *sustain* equality action over time.

Secondly, in a significant number of cases, these external/internal triggers appear to correlate to the degree to which equality action is linked to or integrated in the organisation's overall strategies for anticipating, responding and adapting to change.

## **The external environment**

### **The institutional framework**

The institutional framework refers here to the various institutions and bodies external to the organisation that exert influence on the development and implementation of equality policies. Previous cross-analysis of experiences at company level showed the majority of cases to be influenced to develop equality programmes by:

- legal pressure exerted by European and national legislation against discrimination and in favour of action to promote equality;
- the resources allocated, by the EU and by national public and private institutions, to programmes aimed at encouraging equal opportunities in companies.

The cross-analysis of the cases below permits a more in-depth look at the specific influence exerted by factors operating within the institutional framework. It shows that on the one hand, these may motivate companies to initiate or consolidate equality action over time, while on the other, they may exert an influence on and/or define the nature or 'content' of equality initiatives, along with the overall development process undertaken.

### **The legal framework**

The legal framework is a key equality driver in the majority of the case studies. The evidence shows that equality action is influenced either by the provisions addressing specific equality issues and/or maternity/paternity issues; or by overall labour legislation, e.g. laws regulating part-time work and/or flexibility.<sup>2</sup>

#### *Equality legislation*

It is clear from the case studies that equality legislation is a key factor driving organisations to initiate equality action. It may also exert an influence on its content and on the actors involved. As we shall see below, in some cases the legal framework serves to motivate companies; in others, it obliges them.

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<sup>2</sup> It is interesting to note that the differences between the cases relate to the different national contexts, even though there is evidence to suggest that the transposition into the national contexts of the most recent European directives (e.g. on parental leave; part-time work) and guidelines (e.g. on sexual harassment and reconciliation issues) tends to favour common approaches to specific legislative issues and to exert an influence on the form taken by equality action at company level.

In some countries, legislation has been used to encourage 'voluntary' positive action in organisations and to provide resources to support it. Italian cases A (retail) and C (white goods manufacture), and French cases A and B (food manufacture and packaging) embarked on equality action using resources made available respectively by Italian Law 125/91 on positive action<sup>3</sup> and by the 1983 French law on professional equality.<sup>4</sup> It is interesting to note that in all these cases, equality action resulted from an agreement between the social partners which is either encouraged or required by the law. The French cases show that many of the equality plans negotiated under the law focus on training programmes for blue-collar and poorly skilled white-collar women in companies facing technological change, as a means of enhancing their qualifications and enabling them to move into traditionally male jobs.

Conversely, legislation *obliging* organisations to ensure equality in the workplace was evident in the three Finnish companies, private and public. In these cases the Equality Act 609/86, modified in 1995, establishes an obligation for all private and public organisations with more than 30 employees to draw up an equality plan, which is:

'a systematic scheme of management and activities in the workplace that includes (but is not limited to) issues such as women's career advancement, working conditions and salaries, educational opportunities, participation in group work, use of the family policy plan, equal placement of men and women on assignments, and attitudes towards equality.'

Such obligatory legal requirements may not always have the desired impact on equality, however. In German case C (a local authority), the obligation imposed by the equality law for the public sector at local level is regarded as having:

'little impact on the process of achieving gender equality (where) initiatives and action started long before the law became effective in 1994, and the legal requirements are only minimum requirements compared to what had been done and was already achieved. (Nevertheless) although the law had little influence on the efforts to achieve equal opportunities, it was regarded as helpful.'

Unlike German case C, UK case B (a local authority) was more influenced by the obligations imposed by central government. Like all UK local authorities, case B has to meet the requirements set by central government as regards its employees and its delivery of services, and priorities may change over time:

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<sup>3</sup> Law 125/91 aims to promote women's employment and achieve substantive equality between men and women in employment. Enterprises, consortiums, certain public agencies, trade unions and vocational training centres which introduce positive action programmes may apply to the Ministry of Labour for funding to cover all or part of the costs. Programmes agreed between employers and unions are given priority.

<sup>4</sup> The 1983 law on professional equality introduces the principle of positive action as a means to promoting equal opportunities, allowing the social partners to negotiate 'equality plans', i.e. temporary measures to be implemented at company level on the training, recruitment, promotion and working conditions of women. Incentives are provided: state funding can be used for 'exemplary' schemes. Equality contracts can thus be signed by equality bodies at state and company level. In these cases, state support is up to 50% of the cost of the training or other action, and 30% of the salaries of the employees entering training schemes.

‘the driving force behind the design and implementation of its equality action was a public service ethic – the need to be seen to reflect the composition and requirements of the local community ... Indeed, UK local authorities receive clear direction from the Home Office and from the Department of the Environment, Transport and the Regions (DETR) on community-aware policy objectives and how to achieve them. One of the key policy priorities for both central and local government in the UK at the moment is the abolition of ‘institutionalised racism’, and the promotion of equality of every kind in employment and in society more generally. This has put considerable pressure on public sector organisations to review their internal employment and HR practices and to improve their treatment of women and minorities.’

In UK case A (a private financial services company):

‘ ... following a number of major cases brought and won by women in other companies (particularly women with children wanting to work flexibly), the company’s fear of employee litigation because of indirect gender discrimination may be viewed in the short term as a “negative inducement” to address equality.’

#### *Wider employment legislation*

As mentioned above, other legislation may directly or indirectly affect women’s work, and may sometimes have an unplanned impact specific to women.

Evidence from the research shows that legal provisions concerning maternity/paternity and flexibility provide organisations with opportunities and constraints that affect the nature of the workplace measures taken as regards work and family/social life and positive flexibility. This is occurring in a European context that has seen an increase in ‘reconciliation’ measures, as well as (in some countries) a long-standing legal tradition of promoting ‘reconciliation’ for men and women, as in Finland, for example.

It should be emphasised that company approaches to these measures may range from broadening and even going beyond the legal provisions to one that is aimed at providing employees with organisational alternatives more consistent with business needs. German case A (transport) and B (financial services) offer examples. German maternity law grants three years parental leave with suspension of employment. In case A, which had already ‘offered parental leave to its employees before legal parental leave ... came into force’, the plant agreement on ground staff and flight attendants entitles employees to conditions which go beyond the law: ‘... one additional year of parental leave with employment suspension, and ... three years “education time”, with preferential reinstatement.’

In case B (financial services), where an industry-wide agreement entitles employees to another half-year in addition to the three-year legal parental leave, a specific measure targeting women in managerial roles is explained as follows:

‘Reintegration into the job after a long period of absence from the workplace – for example seven years in the case of two children – becomes increasingly difficult. [Because of] rapid technical

and organisational change in the banks, a return after seven or more years is extremely difficult. Efforts are aimed at an early return, with flexible part-time work, in order to maintain contact with the company and with the task and requirements of the job.’

The legal framework can be perceived by organisations as positively influencing the design of innovative reconciliation measures in the workplace. In German case B (financial services), for example, the personnel manager regarded the regulations as providing the impetus, stating that without the law on parental leave, the company agreement on this issue would not exist.

There is also evidence to suggest, however, that paradoxically, the rigidity of protective legislation on reconciliation and positive flexibility can sometimes act as a barrier to companies developing these measures in practice. For example, a manager in Italian case B (IT) underlines that in the past the ‘rigid’ law on flexibility had impeded the development of a package on work/family life that could provide for individualised forms of flexibility more appropriate to women’s and men’s needs.

### **National programmes aimed at promoting equality**

Evidence from a number of the case studies highlighted the role played in the design and development of equality action by national programmes aimed at promoting gender equality in public and private organisations – programmes such as *Opportunity Now* in the UK, *Opportunity for Business* in the Netherlands, *Optima* in Spain and *Total E-quality Management* in Germany.

These programmes have some features in common, e.g. the goal of increasing and enhancing the capabilities of the female workforce, and an approach that favours an exchange of experiences and public visibility for companies’ commitment to equality.

Differences are found in the content of the programmes and in the approach taken to persuading organisations to commit to equality. The *Optima* programme aims to help companies to initiate equality action; the *Total E-quality Management* award is granted to companies demonstrating that they have developed a comprehensive equality policy; while both *Opportunity Now* and *Opportunity for Business* provide information and some form of support to help companies achieve their stated equality goals.

The *Optima* programme was established by the *Instituto de la Mujer* (Women’s Institute) in 1995, with the aim of promoting women’s access to decision-making positions and technical jobs. Companies agreeing to take part must follow a well-defined procedure: analysis and diagnosis of the current employment situation in order to identify critical areas and potential inequities, followed by the design and development of positive compensatory action. Technical assistance is provided to support the overall equality process. Organisations’ commitment to concrete equality action is highlighted by the awarding of an Equal Opportunity logo.

The Spanish report mentions one critical implication of *Optima*:

‘the *Optima* programme has some limitations as regards the long-term sustainability of equality action ... the activities related to the programme have a short-term perspective (one year’s technical assistance). In order to be awarded the “equal opportunity” qualification, companies must achieve tangible results in a relatively short period of time. Therefore, in many cases, mainly short-term actions are selected, as long-term actions, particularly those implying a change in company culture, are more difficult to implement.’

It is interesting to note that the *Optima* programme has exerted different influences on the three Spanish companies. In case A, a small IT company, it was the starting point for equality action: ‘the company would have never developed equality action on its own.’

For case B, a large multinational IT company, participation in the programme has been a catalyst for enhancing its ongoing equality and diversity policy and making it more dynamic:

‘... their own action plan has acquired greater strength, and more daring measures are implemented than before. ... employees themselves are becoming more aware that company B is interested in abolishing any discrimination within the organisation. Moreover, greater understanding of company B’s gender equality policy ensures greater integration of female employees.’

As for case C, a small distribution company:

‘... the *Optima* programme has served to uncover some of the imbalances that arise when equality policies are not monitored. One contribution of the equal opportunities plan has been to ... re-establish a more balanced workforce. Nevertheless, company C has regarded the *Optima* programme more as a way to gain recognition for “good practice” in its human resource management than as a tool to correct imbalances in the long term. This has hampered the establishment of mechanisms that could ensure the continuity of the equality plan, and simultaneously, the design of more long-term measures.’

The *Total E-quality Management* award in Germany is given for three years to companies that have designed and implemented effective and comprehensive equal opportunities policies, as a means of ensuring a more efficient use of human resources and improving overall performance. Companies interested in applying for the award must undertake a self-assessment of their equality performance by means of a checklist that includes a wide range of potential measures in different areas.

All three of the German companies had been granted this award. Two of them – case A (transport) and case B (financial services) – emphasise the award’s added value from at least two points of view. It has ensured press visibility, and this external positive image, echoing internally, has contributed to keeping equality to the forefront and has resulted in a sort of self-imposed obligation to improve further. As for case C (a local authority), the award has operated as a catalyst for improving equality action:

‘... application for the *Total E-quality Management Award* led to the first collection of data on gender equality ... There are now proposals for using the data ... as a basis for drawing up a periodic report on equal opportunities ...’

‘The EO representative and the personnel director described the award as both an acknowledgement of the work done and an obligation to improve further. Even more important than the award itself is the internal outcome of the application process.’

In the UK, *Opportunity Now* is a registered charity funded by supporters’ subscriptions. The campaign was created in 1991 as *Opportunity 2000*, which:

‘... consists of signatory organisations, for the most part large employers in both the public and private sectors, who are publicly committed to improving, among other things, the proportion of women in middle and top management. The programme works by encouraging organisations to set themselves targets for change, and provides ... information to help them target areas of weakness and specific internal resources needed ...’

UK case C is a supporter of this campaign, but no reference is made to whether or how it has influenced equality action.

Established in 1996, *Opportunity in Business* in the Netherlands is based on the UK campaign. An increasing number of firms, particularly large firms, have participated. Programme consultants help them to analyse their workforce from a gender perspective, setting goals and targets for increasing the proportion of women in higher positions, and developing action plans.

The personnel director in Dutch case A (financial services) explains the company’s decision to sign up to *Opportunity in Business* as a way of improving its image as an employer and its capacity to attract women at managerial level: ‘... companies must support these goals, otherwise they will face problems related to their image, in particular as regards the labour market.’

### **Industrial relations**

Evidence from a number of the case companies, particularly in Italy, Germany, the Netherlands and Finland, shows how the national industrial relations system and industry-wide collective bargaining may exert an influence on equality in the workplace.

Existing research on equal opportunities and collective bargaining carried out by the Foundation has shown that: ‘...collective bargaining is a complementary instrument to legal regulation in promoting and strengthening equal opportunities’ (Bleijenbergh *et al*, 1999).

While specific participatory features of national or industry-wide industrial relations systems define the degree of employee representation/participation in equality action at company level, sectoral collective agreements may set a framework of opportunities and constraints influencing the content of equality action in the workplace.

In Italian cases A (retail) and C (white goods manufacture), one of the factors facilitating the design and implementation of the first positive action plan was the fact that:

‘the National Equal Opportunities Commission for the sector, set up at national level between the employers’ association and the unions, engendered the creation of Equal Opportunities Committees; more targeted action; and the adoption of Positive Action Plans within individual companies by means of information and training seminars for the social partners and the committees in the individual enterprises.’

In Finland:

‘In the 1998–1999 collective income agreements, it was agreed that the main employer and employee organisations launch a development project for equal opportunities in the workplace. The first stage of the project produced a report on equality in the workplace, plus a list of equality criteria.’

Industry-wide collective bargaining may establish important milestones for equality, as in German case B (financial services):

‘The industry-wide collective agreement for banking includes far-reaching provisions on equal opportunities (regarding) job access and sex segregation. ... Outstanding are the provisions on working time.’

In Dutch case A (financial services):

‘In the 1995-1998 collective agreements, the 36-hour working week was introduced. This has enabled employees to work four nine-hour days instead of five eight-hour days. In the 2000 collective agreement in the company, working-time arrangements have been continued from the previous, industry-wide, collective agreement. Financial contributions to employees’ childcare arrangements also belong to the domain of collective bargaining ... In the new company collective agreement, the childcare arrangements have been continued from the previous industry-wide collective agreement.’

Industry-wide collective bargaining may also impose constraints on specific equality action in the workplace, as in Germany, where:

‘... pay equity is not an issue in agreements on equal opportunities in the German context. This is partly because of the German industrial relations system, which involves a dual system of centralised sectoral collective bargaining and company-level industrial relations between management and works councils. According to the Labour Management Relations Act (*Betriebsverfassungsgesetz*), pay and other conditions settled by collective agreements cannot be regulated by a plant agreement.’



It may also reflect a more ‘traditional’ approach to women’s work, as in Italian case A (retail), where:

‘... a more “traditional” approach to flexibility resulting from previous legislation and specific industry-wide bargaining is highlighted. Working hours are organised on a shift basis, and a certain margin of flexibility is possible in that employees can swap shifts ... to cope with family needs. Here, part-time work has traditionally been used – more than in manufacturing companies – as a form of quantitative organisational flexibility, on the one hand, and as a way of meeting the life-cycle needs of women, on the other, thus creating a sort of “rigid flexible” framework, reinforcing women’s segregation by contract and by job. Change and innovation, e.g. working hours “banks” and reversible part-time work, is being brought about by new legal and industry-wide provisions ... the impact on equality will depend on the social actors’ commitment and approach.’

Thus, while the role of social partnership was just one of the factors addressed in this research, the findings reinforce previous Foundation research in highlighting both the positive impact and the limitations it can impose on equality in the workplace.

### **The labour market and market conditions**

The case studies show that changes in the labour market and in market conditions may influence the development of equality in the workplace.

As outlined in the introduction to this report, the current competitive environment in Europe is pushing many organisations to rethink and innovate as regards their approach to HRM. The case studies offer examples of the impact of this on equality. They also provide some evidence of equality action (transversal or specific) being taken to respond effectively to environmental change, and in so doing, build a business case for equality.

As the following paragraphs show, the current changes may work to initiate or facilitate equality action – but they can also undermine it.

### **Changes in the labour market**

Statistics confirm that women’s participation in the European labour market continues to increase, a development that goes hand in hand with the overall improvement in women’s level of education. Predictions indicate that women will continue to make up a growing proportion of the workforce. The scenario based on projected economic growth, in line with the conclusions of the Lisbon Extraordinary Council, set out as the key indicator of success that by 2010 the overall employment rate should rise to close to 70%, while for women, it should increase to over 60% (European Commission, 2000a). This, together with the parallel phenomenon of an ageing population due to lower fertility rates, is producing significant changes in the labour market. Evidence shows that the places left vacant by retiring workers will be filled not by means of replacement growth, but by two different groups: workers currently under-represented in the labour market and immigrants (Norton and Fox, 1997).

In the light of these changes, the development of equality policies may help organisations to ensure that they are able to attract the best people from the widest pool of talent available. Moreover, skills shortages in some sections of the labour market add urgency to the need for equality action aimed at retaining existing skills in companies, as well as recruiting and redeploying women to non-traditional jobs and areas of work.

Evidence from previous research has highlighted that the labour market is a powerful influence on the development of equality (Shapiro *et al*, 1995). Indeed, cross-analysis of these case studies shows how companies in different countries and sectors are currently linking equality policies to organisational strategies for managing and/or anticipating change. This is particularly true for IT companies, and for resources to be allocated at managerial and technical levels. The following are examples drawn from the case studies.

Spanish case A (IT):

‘The company is aware that employees are their main resource. In this sector, demand for technicians is greater than supply, and as a result there is a high turnover of qualified staff.’

Italian case B (IT):

‘... [the] equality approach appears strongly influenced by labour market change. The changing nature of the work (switching from manufacturing to services) is magnifying the need for skilled labour in specific segments of the labour market which – due to new economic developments – appears more and more employee-driven rather than employer-driven. Within this framework, equality initiatives aimed at retaining existing skills within the organisation, as well as recruiting and redeploying women in non-traditional jobs and areas of work, represent an effective means to anticipate/adapt to changes in the labour market.’

German case B (financial services):

‘One main incentive for the commitment of the board and top management to the goal of increasing the proportion of women in management is to keep staff in the company. A shortage of labour in higher positions and highly qualified areas is obvious in all the major German banks. This is an outcome of the process of massive restructuring in the banks and of increased internationalisation and competition in financial markets.’

UK case C (retail):

‘The major factors promoting equality action in case C related to the external and internal labour markets. In the first instance, the company felt it had to take steps to address its difficulties with recruiting and retaining labour.’

These examples clearly show that some organisations are encouraged to avail of the benefits of equality action by the current labour market situation. However, this seems to have a contingent

character and can have a positive outcome for *some* female employees (for example, women in technical or managerial roles) while proving negative for others, e.g. women in poorly skilled jobs. It would be misleading to suggest that as a motivating factor, the labour market can, by itself, sustain equality action in the longer term. Recent history has shown that in times of high unemployment, plentiful human resources and economic instability, some employers will abandon equality initiatives and arguments (Summerfield, 1984; Braybon, 1981; Walby, 1986).

### Changes in market conditions

Market conditions have already been referred to (explicitly or implicitly) in previous research as having an influence on equality action, or, more generally, as encouraging the development of innovative approaches to human resource management (Shapiro *et al*, 1995).

Current cross-analysis shows that increased market competition due to globalisation requires organisations to improve product and service quality and enhance customer satisfaction. Achieving these improvements depends on the contribution of human resources. Both men's and women's skills and potential must therefore be fully developed and utilised. Also, the customer base for more and more products and services is becoming 'feminised', again highlighting the importance of achieving a balanced workforce that reflects this.

It is interesting to note that many of the case studies, across very different sectors (both mature and new), refer explicitly to the link between equality policies and changes in the external market. This may help provide a business case for equality. For example:

UK cases A (financial services) and C (retail):

'... are private sector organisations, both operating in very competitive and increasingly concentrated markets. They are also both in the services sector ... one of the major areas of competition with their rivals is in the area of customer service ... Both companies recognise that this is one of the key areas in which they can develop competitive advantage.'

French case C (IT):

'... the diversity policy represents a major asset ... for the firm. A diversity policy has existed for a long time. It was already regarded as a "business priority" ... [for] several compelling reasons: a global and diverse customer base, the need to retain outstanding employees and partners, the need to develop "a culture that fosters respect for and appreciates differences among people, which clearly helps teamwork, productivity and morale."

Italian case B (IT):

'... Significant market change due to the fall-off in demand during the economic recession, and the acceleration of ICT, require case B to develop ... services ... This implies a reorganisation process based on downsizing and reducing prices, and switching ... part of its activity from

manufacturing to services. One of the consequences is a change in the mix of skills which are needed to meet the new market challenges. Traditional hard ... skills must be integrated with soft skills. It is underlined that soft skills – typical of women – may be regarded as strategic in confronting the new competitive scenario.’

Case B specifically emphasises the fact that its customer base, particularly for ICT services, is becoming ‘feminised’ and/or that women potentially represent an untapped segment of the market. Research and public meetings underline the company’s equality approach to fully exploiting the potential of the new customer base.

In German case B (financial services):

‘The insight of the board and top management as regards the need to promote equal opportunities in the bank is partly an outcome of increased internalisation. The merger with ... [another bank] pushed the issue and had a direct impact. The approach pursued is one of managing diversity’

This is true also for public service organisations. Finnish case C highlights that:

‘... the “feminisation of the customer base” may concern the (public service) also ... “some specific situations are easier to manage for a female (employee), e.g. examining a female client.”’

These are examples where market conditions have had a positive impact on equality action, but it would be naive to suggest that such is always the case. UK case C (retail) shows how the store’s 24-hour opening (designed to to fulfil customer needs) is conflicting with its female workers’ – particularly managers’ – need to reconcile work and family life.

‘At management level, the problem of reconciling home and working life are even more acute. Section managers upwards work full-time hours (but flexibly, including periodic nights and weekends). In theory, they work a 38-hour week; in practice, they work considerably longer hours because of the demands of the jobs they do. These demands are particularly heavy in the 24-hour stores, where store management has to ensure that the store runs smoothly throughout the day and night. Women in the company report considerable pressure on their family lives as a result of the demands of their jobs and the hours they work.’

Other cases show that when an overall commitment to equality is lacking, changes in the labour market and in market conditions, while strengthening the position of some groups of women, may be detrimental to others, whose position is weaker in both the internal workforce and external labour market. For example, German case B and Dutch case A – both in the financial services sector – show how the increased participation of well-educated women in the labour market can combine with company policies on the recruitment/retention of managers (in response to the challenge of a more global marketplace) to favour an increase in women in managerial positions. Meanwhile, women in more traditional jobs, with fewer skills and less education, are seen as ‘naturally’ redundant, and no specific action is taken to improve their situation.



We suggest that this potential for the dual effect of the competitive and labour market can only be overcome by ensuring an overall commitment to gender equality across the organisation.

## The internal environment

### Corporate values and culture

The guidelines for this report stressed that organisational culture has been identified as being a strong lever for change in achieving gender equality, and emphasised the importance of identifying the type of environment that is conducive to equality.

Quite a clear picture emerges from the case studies indicating that ‘people-centred’ corporate values and cultures appear to be consistent with equality, providing organisations with a framework in which the ethical and business cases for equality go hand in hand.

This is true both for organisations that explicitly identify equality as a company value, and for those that do not. An example of the former is Italian case C (retail) where the company’s ‘Charter of Values and Principles’ explicitly refers to equal opportunities:

‘A cooperative shall ensure, for its own women and men workers, equal opportunities, equal terms and conditions of employment, respect for personal dignity and the enhancement of professional capabilities. [The charter] also indicates general criteria for HRM: “ ... [a cooperative] shall avoid any type of favouritism or discrimination and shall give priority to suitability for the role ... attitudes and commitment to cooperative principles ... and ... in the selection and appraisal of staff, shall be objective, fair and consistent, using transparent procedures and guaranteeing equal opportunities.”’

UK case C (retail) is an example of a company where equality is *not* explicitly referred to:

‘... the company believes that its entire “core values” approach is intrinsically equality-based, although equality is not specifically highlighted. It believes that both gender and race equality are mainstreamed into these values, and into its general strategy and policies.’

Corporate values and culture may provide a catalyst for equality action, as in Italian case B (IT), a multinational whose head office is in the USA:

‘... the (US) parent company’s culture was unquestionably the major motivating factor behind ... specific programmes and initiatives aimed at promoting the presence of women in the company. [In the mid-1940s] case B USA appointed its first woman vice-president. ... for ten consecutive years, *Working Mothers* magazine included the company in its top ten list of 100 best companies for working mothers. ... This attention to women has its origin in a particular historical and social context, namely, the US context, which established precise rules prohibiting racial discrimination and discrimination against the disabled.

‘Accordingly ... case B’s culture may be said to have begun ... on egalitarian principles, even though for some years the predominant model was a technical and male-oriented one.’

It may be quite common in multinational companies such as this that the values and vision of head office are transposed to operations in other countries. There has been a change in approach, however, which may be a critical issue: a shift in focus from gender to diversity. This may represent a way to ‘soften’ gender issues, or it could be a catalyst for further action. It is too early to ascertain the impact of this shift, but it should certainly be closely monitored.

The research also shows that a formal egalitarian vision and culture, explicit or implicit, may ‘facilitate’ equality action, but is not in itself sufficient to sustain equality unless it is supported by a serious commitment and coherent action aimed at achieving and continuously assessing equality goals.

As Italian case C (white goods manufacture) shows:

‘... the company) adopted a charter of values (*Vision and Values*), which illustrates the guiding principles of its strategies and policies and its commitment to its stakeholders and the state and the local community. The key values are: cooperation, the development of people, respect for the environment, professionalism, service. The company’s philosophy as regards its own employees is spelled out clearly in the guidelines, which declare a policy of “guaranteeing everyone, by respecting and encouraging the free expression of diversity in an equal opportunities context, professional and individual development coupled with a team spirit which represents the ideal way of working within the group’s environment.” ’

These values are enforced by continuously monitoring and assessing the development of equality:

‘Every year the company draws up a “Social Balance Sheet”, which includes ... indicators (with scores from 1 to 10) measuring the social impact of the company’s strategies, policies and practices on its stakeholders, including employees. One of the determinants ... is the progress of equality.’

In French case C (IT), action is taken to create conditions where the company’s vision is shared with staff at all levels:

‘The (company’s) “Global Diversity Vision” is ... a key success factor. ... “Conformity is a bad thing when you want to get creativity ... so diversity in all forms must be valued by the new leadership ... diversity in terms of colour of skin ... ideas, style, how we express ourselves, in terms of perspectives and experience.” ... one of the new initiatives has been to create a website on diversity, with information specially directed at the various segments of staff – human resource specialists, managers, employees – and touching on the various dimensions of diversity issues: the balance between work and home life, training programmes, etc.’



Changes in corporate culture as a result of restructuring and merging may also be beneficial to equality, as in UK case A (financial services):

‘... the equality agenda is a function of the company’s overall values ... the former paternalistic company culture has been swept away and replaced by one in which improvements in customer service may promote human resource practices which are beneficial for gender equality.’

Cultural change may also be the result of direct commitment and action on equality, as in German case B (financial services):

‘The commitment of the new area board personnel, and later the board, to the issue of increasing the number of women in management positions provided an impetus. This created an organisational culture which led to the issue of equal opportunities being taken up at the highest level. It helped to improve awareness and gave support to women’s networks in the company.’

We should also point out that the development of equality, like other organisational change processes, occurs in the presence of two opposing forces, conservative (organisational inertia) and innovative (organisational innovation). Several case studies draw attention to the fact that underlying male values or stereotypes may persist. It must also be noted that in every organisation, different subcultures may coexist. This can create organisational ‘islands’ – some supportive of equality; others that undermine it. Most successful initiatives include an awareness of this, and coherent action is taken to help minimise the risk of negative subcultures. In French case C, for example:

‘The situation in location X, like many others in [this company] worldwide, is one where the firm traditionally had “a technical cultural identity” i.e. a “masculine” culture, dominated by engineers. The objective of the diversity policy has been to modify this culture and to favour the recruitment and career development of women, in a context where women were originally a minority.’

### **Human resource management**

The research shows that equality action may complement and support innovative human resource management (in particular, responding to change in a people-centred way) as a means of achieving strategic objectives.

Some of the case studies show how a new organisational awareness of the untapped potential of women helps to challenge statistical discrimination based on the stereotypical thinking that ‘women represent a cost for organisations’. This awareness appears to be particularly marked in companies where equality is integrated into HRM, e.g. in Italian case B (IT) and C (white goods manufacture), where key players made the following statements:

‘Women have been changing more than the company itself. ... Women show their value on the playing-field.’

‘Women have indispensable attributes ... they move easily from one area to another. They are customer and results-oriented. Their minds are open to different cultures: an advantage for a multinational company.’

The research shows the widespread need for companies to be innovative in HRM to meet the challenge of change in the competitive marketplace, ensuring quality in their products and services and increasing customer satisfaction. Greater flexibility and responsiveness to the customer and the changing environment are required, with a switch in focus from processes to results.

In this situation, human resources represent a key lever for change, and new conditions and operational tools are needed to capitalise on employee potential and allow it to be fully realised. In many of the case studies, an awareness of this appears to help create attitudes, behaviours and an environment more conducive to equality, developing transparency; positive flexibility; better communication; more open systems as regards recruitment, professional development and training; better assessment of skills and potential; and changes in the career structure.

In a significant number of the case companies, policies aimed at stabilising and building on the strengths of the existing workforce also give impetus to equality programmes. These organisations retain know-how in the company by continually developing and redeploying their staff. It has been shown, however, that unless equality is explicitly built into the process, segments of the workforce may be excluded, leading to a waste of talent. Integrating equality helps organisations to ensure that they are able to retain and develop the best people – including women – from the widest pool of talent. This interaction between equality and innovative HRM is also a key factor in sustaining equality over time.

Some examples drawn from the case studies illustrate these points. In UK case A (financial services), for example:

‘the equality agenda ... is also driven by the company’s eagerness to capitalise on the investment in training and employee development it has expended on female staff.’

UK case C:

‘As a private sector organisation with a large proportion of female staff, it is keen to utilise the abilities of these staff as effectively as possible. Equality is incorporated into wider human resource practices, which in turn form part of an extremely effective corporate model of change in which all areas of activity are demonstrably interlinked. ... To date, equality action has resulted in a much fairer training and employee development regime than used exist in the company.’

Italian case C changed its HRM by adopting a system based on ‘people empowerment’, introducing quite sophisticated and ‘more objective’ management tools to assess potential and capabilities and redefining the leadership model. These innovations, together with the fact that

the career structure is not as rigid and linear as before, have substantially contributed to increasing the number of women, particularly in junior managerial roles.

‘... career development is no longer a tournament ... [The person] who cannot make it now will not be excluded from the career path, and may be ... included later on: this is very important for women. The company finally learnt to wait.’

French case B (food manufacture and packaging) shows how an organisation’s retention policies, together with a commitment to equality, can lead to poorly qualified/educated women being retrained and redeployed:

‘... the women were not qualified to operate the new machines or to tune machines; the male workers from the technical maintenance service had to deal with all the technical adjustments ... Two different human resource policies were possible. One would have been to recruit qualified workers from outside the firm, who would have had to be men, given the lack of technically trained women workers. The political choice made instead, however, was to maintain female employment by training women and availing of this opportunity to develop their technical skills and their access to “male jobs”, “developing the enterprise of tomorrow with the men and women of today.”’

### **Social partnership at company level**

Previous research provided many case examples of equality programmes resulting from agreements between the social partners (Shapiro *et al*, 1995). Collaboration between employer and employee representatives was often favoured by participatory industrial relations models. The case studies also showed that social dialogue in the workplace could provide a context in which the potentially conflicting needs of employees and of the business could be balanced.

The most recent study carried out by Foundation on the impact of collective bargaining on equality (Kravaritou 1997; Bercusson and Weiler 1999; Dickens 1998), emphasised that it is a key mechanism for determining terms and conditions of employment.

Current cross-analysis provides evidence to confirm that social partnership in the workplace can influence different aspects and different developmental stages of equality action.<sup>5</sup>

### **An influence in initiating equality action**

In some of the case companies, an agreement between the social partners combined with legislative pressures to initiate equality action. Examples are French cases A and B (food manufacture and packaging) and Italian cases A and C (retail and white goods manufacture).<sup>6</sup>

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<sup>5</sup> Social partnership here refers to the social actors managing the equality process together, not just through collective agreements, but also in wider, company-based equality action.

<sup>6</sup> Such agreement is a condition set by the 1983 French Law on professional equality; and ensures priority for funding in Italian Law 125/91 on positive action.

French case B explains how equality action began:

‘... the European convention signed in 1988 between case company B and the International Food Industry Union (UIL-UITA) stated that diverse “coordinated initiatives” should be developed by both parties, including initiatives to ensure “true equality between men and women”, given the manner in which work was developing. The model for a negotiated equality plan included in the 1983 law was therefore acceptable to case B company.’

At this stage, one of the actors may take the lead in the equality process, as in German case A (transport) where:

‘The driving force behind approaches to gender equality in the company were the employee representative committees. The first steps did not come from the board. Management took the initiative later and is now completely committed to the issue.’

### **An influence in sustaining equality action**

Social partnership may shape equality strategies and provide a catalyst for continued equality action. This is more likely to happen when equality is adopted in an environment of ‘substantial partnership’, where partnership means a shared culture resulting in consistent, full involvement, consultation and transparency, and not just a well-defined procedure or ritual.

German case A (transport) provides an example of how social partnership has been developing over the years, ensuring continued equality action:

‘The driving force for achieving EO in the company were the “codetermination committees”. About 1971/1972, the first guidelines for the promotion of women were developed. For the first time, an employee representatives’ initiative was undertaken. In the beginning, the board of management showed some resistance, but after about half a year guidelines were created. The next step was a plant agreement on the reconciliation of work and family life, which granted parental leave beyond the legal requirements. At the end of the 1980s, a further push came from the works council for a plant agreement on equal opportunities and a representative for EO. At the start of the 1990s, a plant agreement on a representative for women’s issues was reached.’

In the mid-1990s, a plant agreement on equal opportunities was negotiated. It became effective by 1 January 1995 and included detailed provisions for an equal opportunities representative.

Discussions on where the EO representative should be based went on for some time ... The works council pleaded for a position on the group board or area board. The argument was that a representative in management would be more powerful and influential ...

Management argued for ... the group’s works councils. The agreement established the position in the central personnel department. ... the impact of these measures are seen as positive by management. It was the right decision to base the EO representative at a high level in the personnel department. She has more influence in this position.’



Italian case C (white goods manufacture) provides shows that equality may be embedded within a framework of substantial partnership:

‘Within the group culture, the so-called “Case C participatory model” has now been established for many years (1991), based on the belief that industrial relations can be a competitive lever for the success of an enterprise operating in a low-tech environment with high labour density, where human resource development is indispensable. Underlying this model is a culture of recognition of the role of the union and openness towards the local community.

The participatory system was launched with joint training programmes for the social partners, aimed at facilitating ... shared knowledge of the company system, the adoption of a common language and the construction of joint analyses. For the same reason, the company computerised its communications, putting a personal computer at the disposal of the union that gave access to the database containing the information usually provided at union information meetings.

The participatory system is founded on joint committees made up of equal numbers of social partner representatives. At present these committees are as follows: the Ecology Committee, Joint Technical Committee, Joint Monitoring Committee, National Joint Committee for Combined Training and Special Employment Committee.

They also include the National Equal Opportunities Committee, IPAZIA, created in 1992 following a union agreement. The Committee is responsible for promoting women’s professional and personal development through training and organisational measures; identifying and eliminating forms of discrimination; propagating an equal opportunities’ culture, and taking action to ensure proper respect for personal dignity. It has twelve members, six appointed by the union side and six appointed by the company. Since 1995 (following the union agreement of 10 December 1993), IPAZIA has been joined by subcommittees called “Ipaziette”, based in the companies within the group which have over 500 employees, and composed, in each company, of six members appointed by the unions and the company on an equal parity basis.’

It must be emphasised, however, that a participatory industrial relations system at company level does not necessarily imply shared ownership of equality at the different stages of its development, as we can see from Italian case A (retail), where it is the company that takes the lead in the process:

‘Even in a favourable context such as that of the cooperative, the union’s commitment seems to stop with the actual agreement reached between the parties, leaving the initiative and development of equality action to the company side.’

In an organisation characterised by participatory industrial relations, which attaches importance to consensus, this may undermine the sustainability of equality action over time. Again:

‘So far, union involvement seems to have been confined to backing up the company initiative. Since further developments may affect major issues related to the organisation of work – which

could give rise to disagreements and disputes between male and female workers (purely as regards the question of flexible working hours and part-time work) – it is essential that union involvement should become active, to consolidate the relationship between the Equal Opportunities Committee and the union structures, and to make equal opportunities an integral part of participation strategy. The more the revision of organisational models offers room for contact between the parties, to allow them to act with responsibility and a shared basis of objectives, analyses and assessments, the more effective this will be.’

### **An influence on the content of equality action**

Foundation research on collective bargaining has shown that across the EU, collective agreements on equality issues have influenced the content of equality action, focusing mainly on positive action, sexual harassment, parental leave and the regulation of working hours.

The next chapter explores this point in more detail. It is worth noting here, however, that in the case studies, a number of specific measures have resulted from agreements between the social partners, particularly those regarding terms of employment and working conditions, flexibility, the reconciliation of work and family life, and pay equity, as well as (in a few cases) issues related to ensuring an equality environment, with particular reference to sexual harassment.

Finally, it is interesting to note that companies explicitly mentioning the role of social partnership in equality action represent a majority in this study. The phenomenon is thus not limited to companies whose national contexts are characterised by institutionalised participatory industrial relation systems.

### **Key points**

This chapter has highlighted the key factors in the case studies that appear to motivate and/or support organisations in working towards gender equality in the workplace.

The research shows that much national legislation applies sanctions and ‘negative’ pressure on organisations not to discriminate. There appears, however, to be a growing trend – largely emanating from Europe – towards legislation which, alongside growth in national programmes, seems to positively encourage and provide guidance and support for gender equality. Indeed, this positive approach appears to have caught the attention of some of the larger, more influential companies (in terms of employment) in some of the Member States included in this study.

Thus, both the law and national programmes appear from this study to play an important role in initiating, sustaining and raising the profile of equality action in the workplace. A clear message has also emerged, however, regarding the need to ensure that national programmes are ongoing, and that they themselves must emphasise the need for the long-term sustainability of equality.

Collective bargaining was also highlighted in the research as playing an important role in establishing equality standards in pay and employment conditions, thereby supporting the legislative measures.



Current changes and pressures in external market conditions and in the labour market are undoubtedly having an impact on workplace equality. Some of the case-study companies appear to be responding positively to women's greater participation in the labour market, their increasing level of education and their growing profile as consumers by seeking to recruit and retain more women. There are indications, however, that highly qualified and professional women are benefiting more from this than unskilled women or lower-level administrative workers.

These changes have a double edge. There is evidence in some of the case studies, for example, to suggest that the pressure on companies to provide a 24-hour/7 days-a-week service is having a negative impact as regards the balance between work and family life for women and men.

The case studies also suggest that whether organisations' response to their external environment takes equality into account or ignores it is to some extent dependent on their internal environment. The research shows the importance of internal pre-conditions that can help create a foundation for equality and provide a stimulus for equality action, among them a supportive organisational culture/values, an innovative approach to HRM and a partnership approach to industrial relations.

We have seen from the case studies that the factors that can help initiate, facilitate or sustain equality in the workplace can change over time. This shows how important it is for organisations to continually monitor the equality implications of all internal and external developments.

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## Chapter 4

## The content of equality action

The research guidelines presented a hypothesis stating that:

*A comprehensive set of equality policies that considers both formal and informal aspects of organisational life, and that are reflected in procedures and practices, are required to achieve and sustain equal opportunities between women and men in the workplace in the long term.*

This hypothesis arose from previous research: the 19 cases presented in Shapiro *et al*, 1995; and 47 cases in Valbjorn *et al*, 1998. Cross-analysis of these case studies showed that equality action in the workplace is often limited in scope, taking the form of either initiatives of a particular nature or focused on a specific target group/organisational area; or company-wide programmes or policies. Although equality action can be designed and developed in different ways, three major objectives were common to the majority of the cases:

- overcoming vertical and horizontal job segregation;
- overcoming stereotypes and building an equality environment;
- ensuring sustainable flexibility and reconciling work with family and social life.

Analysis and assessment of the impact of these case studies highlighted the importance of undertaking equality action in four key areas, namely:

- recruitment and selection;
- professional development;
- work organisation;
- the equality environment.

This section of the report presents an analysis of the case studies in the current research, in order to establish how and to what extent action is being undertaken in each of these areas.

## Recruitment and selection

Evidence from the case studies confirms that focusing action on recruitment and selection is a basic first step adopted by companies to try and widen women's access to jobs and break down job segregation.

Most of the case studies offer examples of the establishment of specific or generic recruitment goals and a review of some or all recruitment and selection policies, procedures and practices. Initiatives therefore range from specific measures (notably when initiating equality action) to ensure that no discrimination occurs and to widen access, particularly to traditional male-dominated jobs; to integrating equality into overall company policies, procedures and practices so as to increase the number of female applicants and appointments and obtain a more balanced or more diverse workforce.

In most of the case companies that have achieved some success in the area of recruitment and selection, the organisations have explicitly set numerical goals to try and increase the number of female workers – either overall in the organisation or in specific areas. Examples are: Finnish case C (the public service); German case C (local authority); Dutch case C (manufacturing); Italian case B (IT); French case C (IT) and Spanish case A (IT).

These goals have been supported by reviewing previous procedures and developing various operational tools and practices:

### Job advertisements

- Reviewing job advertisements – as in German case A (transport) and Italian case A (retail) – to ensure that they are not gender biased.
- Encouraging both men and women to apply to job advertisements in the media, as in French case C (IT) and Italian case A (retail).
- Widening the recruitment pool, e.g. Italian case A (retail) and UK case C (retail).
- Running campaigns in universities and colleges to attract women applicants to non-traditional areas such as engineering, e.g. Italian cases B (IT) and C (white goods manufacture); French case C (IT) and German case A (transport).

### Reviewing job descriptions and demands

- Reviewing and gender-proofing job requirements and job descriptions (Italian case A – retail).
- Putting a lesser emphasis on formal educational qualifications than on personal attributes and potential (UK case C – retail).
- Placing greater value on 'soft' skills and abilities, e.g. Italian case A (retail); UK case A (financial services) and French case C (IT).

### Reviewing the selection process

- Ensuring transparent procedures, e.g. UK case A (financial services); Italian cases A (retail) and C (white goods manufacture); German case C (local authority); and Spanish case A (IT).



- Ensuring that recruitment and selection focuses more on individual qualities and aptitudes (UK case C – retail).
- Ensuring that the applicants are assessed exclusively on professional demands and job requirements (German cases).
- Ensuring balanced representation on selection committees/panels/teams, e.g. German case C (local authority) and French case C (IT).
- Having a written code of practice as regards equal opportunities, e.g. UK case B (local authority) and German case C (local authority).
- Ensuring equality training for recruitment/selection staff, e.g. UK cases B (local authority) and C (retail); Italian cases A (retail) and C (white goods manufacture).
- Requiring interviewers and external recruitment agencies to justify the basis for their selections, and ensuring that feedback is given to both successful and unsuccessful candidates, e.g. UK case A (financial services) and UK case C (retail).

### Other key initiatives

- Ensuring preferential treatment for female and ethnic minority applicants who fulfil the requirements, e.g. German case C (local authority) and Dutch case C (manufacturing).
- Re-organising work and improving those working conditions that inhibit women's access to traditionally male blue-collar jobs (Italian case C – white goods manufacture).
- Monitoring the proportion of men and women applying, particularly for managerial/technical jobs or in specific areas, e.g. French case C (IT) and Italian case B (IT).

It must be underlined here that in several of the case companies the goal and consequent measures taken to broaden female recruitment are targeted mainly at women in managerial, senior white-collar or technical positions. Measures to increase women's access to lower positions appear in only a minority of cases: UK case C (retail); and Italian cases A (retail) and C (white goods manufacture).

This may reflect the current economic climate, in which women's access to higher/technical positions is apparently being affected by both changes in the labour market (skills shortages and the increased participation of well-educated women) and changes in market conditions, with an emphasis on soft skills to meet the demands of more customised products and services. In this situation, equality action may represent a sort of by-product of policies aimed at meeting more or less contingent business needs, and the cost of discriminating may seem higher than the cost of not discriminating. This represents an advantage for women, but unless the business case is linked to an ongoing commitment to equality, there is a risk that equality action will not be sustained.

As for blue-collar workers, in Italian case A (white goods manufacture), where:

'... the criteria, content, and managers' way of conducting interviews were coloured by a series of prejudices against women, imbued with the basic idea that women were not prepared to do certain types of work and that certain jobs were not suitable for women.'

success was achieved in ensuring women's wider access to jobs by introducing a number of corrective measures, taken after a detailed investigation. These included:

‘... revision of the selection criteria, training sessions for managers on conducting interviews in a non-discriminatory manner, and modifying the technical equipment for some of the jobs considered unsuitable for female employees.’

This example may explain the poor results achieved in a similar case, Finnish case A (manufacturing). Here, the goal of increasing the presence of women in male-dominated blue-collar jobs has been established, but no concrete measures appear to have been implemented to remove the obstacles that discourage women from applying: a sex-stereotyped perception of these jobs, and perhaps the working conditions also.

Last but not least, evidence from case companies where equality appears to be integrated into overall recruitment/selection policies, procedures and practices highlights the need for ongoing monitoring of data in this area, to ensure that equality goals are continuously achieved. This is a critical issue as regards overall equality action, one that is referred to again in the next chapter on the process of establishing equality in the workplace.

## **Professional development**

Cross-analysis of the case studies shows that professional development is a key lever for redressing discrimination or disadvantage suffered by women, ensuring that both women and men employees can reach their full potential.

Equality in this area has been enhanced by means of more circumscribed action (particularly during the initial phase of the equality experience) focusing on particular target groups or organisational areas, and/or by reviewing policies, procedures and practices and introducing innovative ways of developing employees in line with a fair assessment of their abilities and potential.

As regards professional development, the case studies show that changes in policies, procedures and practices deriving on the one hand from innovative approaches to HRM, and on the other from equality action, may complement each other. It is interesting to note that focused and successful equality action in Italian case C (retail) and French case B (food manufacture and packaging) both involved a need to create new HRM operational tools: respectively, assessing employee potential and introducing professional development initiatives to improve access to more senior positions; and introducing a new system for retraining female and male blue-collar workers. Other organisations – Italian cases B (IT) and C (white goods manufacture); French case C (IT); German cases A (transport) and B (financial services); and UK case C (retail) – have achieved and sustained equality goals in this area by means of innovative HRM procedures and practices.



A number of measures drawn from the case examples appear effective in removing the disadvantage experienced by specific groups of women, enhancing their professional development:

- Well-designed and focused training initiatives that help women in lower-level blue-collar positions to move into non-traditional jobs, e.g. Italian case C (white goods manufacture) and French cases A and B (food manufacture and packaging).
- Training initiatives aimed at increasing women's assertiveness, e.g. Italian case B (IT) and UK case B (local authority).
- The training and redeployment of white-collar women, allowing them to move from more traditional female jobs to more innovative or more technical areas; or providing them with wider access to professional development. Examples are Italian cases B (IT) and C (white goods manufacture); French cases A and B (food manufacture and packaging); and German case C (a local authority).
- Different forms of mentoring to support the development of women for leadership roles, e.g. Italian case A (retail); German cases A, B and C (transport; financial services; a local authority).
- Different forms of monitoring, e.g. French case C (IT); Italian case C (white goods manufacture); UK case B (a local authority) and German case C (local authority).

The creation of new specific or overall policies, procedures and practices ensures increased opportunities for women, particularly those in junior managerial roles. Some measures seem particularly effective, including:

- Employee empowerment.
- Publicising jobs.
- Setting up procedures whereby the discretionary power of the immediate hierarchical superior is limited and/or minimised.
- Training for all employees at the point of entry.
- Tailored and individualised training and development.
- Ongoing skills training.
- Mentoring.
- Changing the key abilities and skills required by companies so that soft skills are emphasised.
- Changing leadership profiles and roles.
- Changing the traditional career structure to a non-linear one.

It is interesting to note that only a few of the case studies mentioned the goal of ensuring equal pay: Finnish cases A, B and C; UK case B (a local authority); Dutch case A (financial services); German case B (financial services – limited to managerial roles) and C (a local authority). Even in these cases, there is little or no evidence of the criteria applied or the results. The reports on UK case B and German case C, however – both of them public service organisations – do refer to projects in relation to this issue. The German project:

'... focuses on potential structural discrimination in job descriptions and job evaluation in the national sectoral collective agreement.'

The project is aimed at developing unbiased methods (standards) for evaluating service sector jobs. Resulting from an agreement with the union, the project will test a 'gender-neutral' job evaluation system for predominately male and predominantly female jobs in three different organisational areas.

The German report refers to the fact that:

'This project will not result in any entitlement affecting pay or a regrading of the jobs concerned. But administrative and gender equality gains are emerging from the process and from discussion of the issue ...'

As for UK case B:

'... pay inequities now have to be addressed to comply with UK legislation on 'Equal Pay for Equal Value'. A 'Pay and Grading Review', implemented from April 2001, will apply a common Job Evaluation Scheme to all jobs. Unfair bonuses for men's work will be abolished, and eventually it is intended that a single set of employment terms and conditions of service will apply to all staff. It is not clear how far case B has progressed with this objective. One HR manager, the Head of HR in the Housing Department, told me that this has already been almost completely achieved. Other departments were not aware of how much progress had been made.'

Meanwhile in Finnish case B (financial services), the implementation of a new performance-based job evaluation system has uncovered 'an unexplained bonus for men, which is under examination'.

Although examples of good practice emerged from the case studies as regards professional development, it is also important to highlight some of the more problematic areas.

### **Women with lower qualifications**

Policies and practices aimed at retaining women and ensuring their professional development appear to be generally company driven. They are therefore more likely to be integrated into overall HRM when targeting women in technical and managerial jobs, where most companies are facing strong competition in the labour market and/or skills shortages. Meanwhile, policies targeting less qualified women are more likely to be developed as specific equality initiatives, mostly promoted in the context of a joint commitment and/or bargaining between the social partners at company level.

The research shows that a substantial commitment to equality is needed to positively manage the redeployment of women in lower-level white and blue-collar positions, who are more negatively affected by the labour market. Examples are Italian case C (white goods manufacture); French cases A and B (food manufacture and packaging); Italian case B (IT) during the first stage of equality action; and German case C (a local authority).



The absence of this commitment and awareness may result in contradictory practices: a strong emphasis on women in managerial roles, while women in less qualified white-collar positions (a majority of female employees) are made redundant or have their contracts changed from full time to part time, as in German case B and Dutch case A (both financial services).

### **Part-time workers**

Part-time workers' access to professional development appears to be mixed. In some cases, e.g. UK cases A (financial services) and C (retail) and Italian case B (IT), part-time work does not represent a barrier to professional development and access to managerial roles. In other cases, e.g. Italian case A (retail), part-time work is a major determinant of gender segregation and dead-end jobs.

Meanwhile, some cases show that there are still barriers to a full acceptance of part-time managerial positions. This is partly related to cultural issues regarding managerial roles: a tradition of continuous presence, long hours and so on.

### **The organisation of work**

The European Commission's Green paper, *Partnership for a new organisation of work*, while emphasising the importance of new ways of organising work to enhance European competitiveness, poses three questions (perhaps challenges) which are particularly relevant to this research project (European Commission, 1997a):

- What more can be done to ensure that a better gender balance is achieved through the development of new ways of organising work?
- How far will the growing participation of women in the labour market have an impact on the organisation of work?
- What practical steps can be taken to ensure better use of the potential of all our people in the new organisation of work?

The research provides some answers to these questions. It must be underlined, however, that only a few of the case studies made specific reference to a significant change in the organisation of work, although the majority provided examples of positive flexibility and measures to reconcile work, family and social life.

### **A redesign of work**

The case studies show that a redesign of work might help overcome the rigid gender division of labour that exists in the workforce. Two contrasting examples (positive and negative) in the retail sector illustrate the potential for measures in this area, as well as the possible difficulties involved in tackling the problem.

In UK case company C:

'[The company] ... makes widespread use of cross-functional and multiskilled teams, particularly in management projects. All its major projects, including its current Diversity Project, are

conducted using *ad hoc* cross-functional teams. At store level, all staff are ‘multiskilled’, meaning that they are trained in a variety of tasks and can rotate between them if necessary.’

Conversely, in one of the Italian companies, work is organised around a traditional division of male and female jobs, exacerbating gender segregation. This represents a key challenge for future equality action. Gender segregation is explained as follows:

‘ ... stereotypes and prejudices which have their origin in the role attributed to women in society are mirrored within the company. Moreover, the distribution of jobs between women and men clearly and markedly reflects the traditional division between typical women’s and men’s jobs. Occupations such as the processing of meat, which involved handling dangerous utensils and mechanical implements, were performed by men because they were associated with physical strength, considered to be a typically male characteristic.’

Some reference is made to the opportunities presented and constraints on future action:

‘Introducing change to the organisation of work presents a considerable degree of difficulty, because it means touching on issues which fall within the scope of collective bargaining between the social partners, and requires widespread consensus and involvement on the part of not only the actors in such policies but also the entire company as an entity.’

As for blue-collar workers, two case companies – French case A (food manufacture and packaging) and Italian case C (white goods manufacture) – highlight the importance of improving working conditions and working environments that prevent women from entering traditionally male jobs.

In Finnish case A (manufacturing), however, the company’s willingness to create new working schedules to suit women’s as well as men’s needs failed to achieve a gender balance.

‘ ... changes ... have been introduced to make working conditions suitable for everyone, but the number of women hasn’t increased; on the contrary it has been decreasing, because women feel that shiftwork is not suitable for them.’

This may be reinforced by the feeling in the workforce generally that shiftwork is not appropriate to women.

Overall, the case studies provide little evidence of new ways of organising work promoting gender equality in the workplace. This is an area that requires more detailed and dedicated research.

### **Flexibility and the reconciliation of work and home life**

All the case companies refer to flexibility and the reconciliation of work/home life. Approaches to flexibility appear to be influenced by a number of factors:



- Organisations are facing increasing pressure to become more flexible and responsive to both customer and employee needs.
- The demand for a faster response time and for customised products and services is leading to a greater need for flexibility in the organisation of work, working hours and job contracts.
- The growing number of women in the workforce is adding urgency to the need for flexible working practices to enable them to reconcile work with their care responsibilities.
- More and more men and women are demanding a better balance between work, family and social life.

The challenge for companies today is thus to try and reconcile these potentially conflicting needs in order to remain competitive. EU directives on part-time work, working time and parental leave are also currently heightening the focus on balancing work and home/family life, both at European and national level.

The flexibility measures emerging from the case studies appear to be shaped by the opportunities presented and constraints imposed by the national legal frameworks; by collective bargaining (industry-wide and/or at company level) and by companies' own approaches to flexibility. The wide range of measures adopted in the case companies include:

- Individualised flexible working hours (daily/weekly): most companies.
- Group flexible working hours: Italian case C (white goods manufacture).
- Flexible time off: French case C (IT).
- A working hours 'bank': Italian case C (white goods manufacture); Dutch case B (financial services); French case C (IT).
- Job sharing: UK case B (local authority); French case C (IT). Part-time work: all the case companies.
- Reversible part-time: all three German companies; Italian case B (IT).
- The extension of part-time work to managerial levels: the Dutch, UK and German companies.
- Reversible teleworking: Italian case C (white goods manufacture).
- Supplementary teleworking, i.e. where the employee works less than one full day per week at home (European Commission, 1999a): Italian case B (IT); German cases A and B (transport and financial services).
- Time/stress management training: French case C.
- Parental leave beyond the legal provisions: German and Dutch companies.
- Information/education to facilitate re-entry to the workplace after parental leave: most companies.
- Family service/maternity and paternity service: German and Dutch case companies; Italian case A (retail).
- A childcare service and allowance: Dutch and German companies; Italian case C (white goods manufacture).

**Part-time work.**

It is interesting to note that the use of part-time work is strongly influenced by national contexts and legal frameworks. This is best illustrated by some ‘extreme’ examples.

In Italy the proportion of workers who work part time is 15.7%. This is almost 18 percentage points below the European average, and these workers have traditionally been concentrated in certain services (e.g. retailing), as a means of achieving numerical flexibility. In other areas, like financial services and manufacturing, the proportion of part-time workers is marginal; part-time work has mainly been used after maternity leave as a measure to enable women to reconcile work/family life, and as such, it constitutes a reversible form of flexibility. Part-time work has been regulated by legal provisions establishing (until recently) a so-called ‘rigid’ framework of flexibility, and it is a bargaining issue at both sectoral and company level.

Part-time work is a bargaining issue in the Netherlands also, which, unlike Italy, is:

‘... well-known for having the highest part-time rate among female workers in the European Union. Since the late 1970s, this rate has been steadily increasing. In 1995, almost three out every five women in the labour force held a job of 12 to 34 hours a week (58%), whereas in 1988 it was 50%. Nowadays, the preference among Dutch working women wanting to have a baby is to work part-time: three out of four prefer to keep their jobs, but the vast majority only want to continue if they can reduce their working hours, usually by half. Moreover, women who had reduced their working hours are now seeking to extend them ... full-time and part-time jobs barely differ in terms of levels of pay and working conditions.’

In the UK the percentage of part-time workers is significant (44% of women and 8% of men work part-time):

‘Currently case law is focusing on employment flexibility and indirect discrimination. Many cases are concerned with discrimination against women who wish to return to work part time, or other “family-friendly” hours, after maternity leave. ... Many employers do not give consideration to female employees seeking flexible working patterns when they return from maternity leave, and the issue of indirect discrimination through an insistence on full-time working is now prominent in equal opportunities case law.’

Aside from such specific examples linked to national contexts, the case studies also highlight two different approaches to part-time work:

- part-time work seen mainly as a measure of organisational flexibility (either positive or negative); and
- part-time work viewed as a temporary – and therefore reversible – measure to meet employees’ life-cycle needs.

In either case, part-time work remains mostly female, and neither form of part-time work ensures professional development, unless there is an explicit commitment in this regard and specific action is taken.



Finally, regardless of whether part-time work is allowed to continue to block career development or not, it is still not seen as acceptable in the case of managers, as UK case A and Dutch case B (both financial services) illustrate. However, there is evidence from other case companies – e.g. German case B (financial services) – to illustrate that reversible part-time work is being used as a flexible measure to favour the re-entry of women to managerial positions after maternity leave, in order to reduce the length of parental leave and retain these women in the company.

### **Telework**

The case studies do not make any reference to employees involved in stable and continuous forms of telework. A relatively small number refer to telework as a flexible arrangement to be used occasionally or as a measure favouring the return to work of women in white-collar and managerial positions after maternity leave. It is interesting to note that the development of telework appears to be subordinated to an analysis of the ‘teleworkability’ or otherwise of individual positions or a particular set of positions.

### **Sustainable flexibility**

Evidence from the case companies may provide some indication as to how to ensure ‘sustainable’ flexibility, i.e. flexibility that is capable of harmonising the potentially conflicting needs of work and family/social life without exacerbating segregation or marginalisation.

As already noted, the research provides rich material on the wide range of equality arrangements and measures currently being designed and developed. Although they may share common features, such measures are created to fit the individual organisation, and they therefore mirror specific organisational and employee needs. Some hypotheses can be drawn, however, as to how they can affect equality.

Approaches whereby a standard measure, such as part-time work, is identified as suitable for the needs of a supposedly standard (gendered) group, e.g. working mothers, are more likely to have a negative impact on ‘flexible workers’. This is because these approaches tend to enhance phenomena such as marginalisation in the workforce, lack of opportunities for professional development, and discrimination in terms of promotion and the segregation of work as well as statistically.

Conversely, more holistic approaches, which view flexibility as a means of ensuring a work/life balance, and which design/develop a range of solutions applicable to different problems and different people, without distinction based on individual or hierarchical positions, appear more conducive to equality. With this approach, measures tend to be more individualised and are themselves flexible; they can thus be reversed when not needed, and new solutions may be found.

Indeed, there are indications from some of the case studies of a move towards a more positive approach to flexibility and work/life reconciliation issues. French case company C (IT), for example, is committed to developing policies and practices enabling managers and employees:

‘ ... to focus on achieving business success and to juggle the responsibilities of work and personal life. ... [This] can enhance employees’ contribution and management effectiveness. These initiatives must include flexible work arrangements – part-time work, job-sharing, telecommuting and virtual offices, variable work schedules, flexible working hours, flexible time off, leaves of absence ... a study was conducted in 1996 by the CNRS to identify precisely what were the obstacles for ... staff in this respect. A team project was launched on this issue for the whole X unit, to coordinate all the “grassroots” initiatives emerging from the various business units, and to communicate internally on the business interest involved in promoting this programme.’

In the context of this approach, flexibility and the reconciliation of working life and personal life are not regarded as separate issues belonging to separate worlds. Flexibility and work/life policies and practices complement each other, and there is an attempt to balance organisational needs with the diverse needs of a diverse workforce.

The impact of this new approach is not yet clear, but it obviously needs to be supported by an effort to challenge present individual and organisational culture. In French case C (IT) specific supportive action has been taken:

‘ ... sponsoring managers were identified to support the programme. Conferences, presentations, training and working groups have been set up to develop a cultural awareness among the staff about work/life balance issues. One major concern ... has been that [initiatives] conform with an equality objective, i.e. that work/life balance initiatives be an issue not just for women but for women and men.’

It must also be noted that organisations’ interest in moving towards more individualised flexibility measures may be constrained by the legal framework – as in Italian case B (IT) – or by a traditional approach to collective bargaining, as in Italian case A (retail).

One solution to the problem may lie in the capacity of the social actors at company level to negotiate innovative approaches (in anticipation of changes in the legislation), where individualised flexibility is not detrimental to the protection of employee rights. In Italian case C (white goods manufacture):

‘Provision of a “working hours bank” ... entitles individual employees to “save” the overtime hours worked throughout the period of their employment, and to “spend” them by taking either short or long leave (a departure from standard bargaining procedure).’

It should be noted that this measure, designed also to meet the potential needs of immigrant workers who may want to take longer leave when going back to their native countries, can easily be applied to other subjects and needs.



## The equality environment

Evidence from previous research based on case studies showed that a significant type of sex inequality at work is related to culture (Cassell and Walsh, 1993; Franklin, 1985; Gherardi, 1995). Unexamined stereotypical assumptions give rise to operating procedures and practices that become part of organisational culture, thus allowing gender discrimination.

Establishing an equality environment demands action aimed at changing the organisational culture to overcome gender stereotypes, and ensuring that employees adopt values, attitudes and behaviours that are consistent with equal opportunities. It is important to ensure that people are treated as individuals rather than as members of stereotyped groups. This means judging people on their own merits rather than acting on the basis of assumptions about how any group to which they may belong 'always behaves'.

All the case studies included in the current analysis illustrate the importance of action to ensure an environment consistent with equality and to produce the required cultural change. Many of them refer to a cultural change having been achieved, although it is sometimes difficult to find evidence to support this.

Differences have been found between the cases, depending on issues such as the breadth and scope of the equality action and the actors involved in designing and developing measures. A number of specific key actions, however, may be identified for ensuring an equality environment:

- Integrating equality into overall guidelines and into all strategic goals, as in German case C (a local authority).
- Assessing managers' performance on reaching equality goals, e.g. French case C (IT).
- Communicating progress and the rationale for equality, e.g. French case C (IT), Italian case B (white goods manufacture); Spanish case A (IT).
- Using the intranet as a means of ensuring greater transparency on key company issues and practices, e.g. French case C (IT).
- Keeping equality to the forefront by organising internal and external initiatives e.g. conferences, workshops, meetings, fairs and web-sites, e.g. Italian case B (IT) and C (white goods manufacture); French case C (IT) and the German case companies.
- Championing equality and demonstrating commitment to equality by organising and participating in external public initiatives, e.g. Spanish case B (IT) and the German companies.
- Ensuring the 'visibility' of the organisation as one committed to equality, and participating in equality programmes/campaigns either nationally or within companies' networks on specific issues, e.g. the German and Spanish companies.
- Reviewing written materials and advertising and ensuring that they are consistent with equality, e.g. Spanish cases A (IT), B (IT) and C (distribution); German case A (transport); Dutch case B (financial services); Italian cases A (retail) and C (white goods manufacture).
- Providing awareness training for all staff and managers on discrimination and prejudice, e.g. UK case B (local authority); Dutch case A (financial services); Italian case C (white goods manufacture).

- Targeting men and women by means of initiatives aimed at informing and raising awareness e.g. discussion groups, day workshops, seminars, intranet communication, etc., e.g. Spanish cases A (IT), B (IT), C (distribution); German case A (transport); Dutch case B (financial services); Italian cases A (retail) and C (white goods manufacture).
- Undertaking action to promote attitudes and behaviours consistent with equality goals – policies and training to combat sexual harassment, and training on equality issues and practices, e.g. Italian case C (white goods manufacture); UK cases B (local authority) and C (retail); and the German and Finnish cases.
- Drawing up and publicising written codes of practice or guidelines on specific issues, e.g. sexual harassment or recruitment/selection, or on overall organisational policies, procedures and practices (most of the case studies).
- Carrying out surveys on the equality climate and employee satisfaction, e.g. Spanish case B (IT) and German case B (financial services).

It is interesting to note from the cases that while core organisational values that make explicit reference to equality may contribute to ensuring an environment where attitudes and behaviours do not contradict equality, it is nevertheless important that specific action is taken to ensure that these values are acknowledged and put into practice throughout the organisation. In French case C (IT), for example:

‘To concretise this new strategic importance of diversity, one of the new initiatives has been to create a web-site on diversity, with information specifically directed at the various segments of the staff – human resource specialists, managers, employees – and bearing on the various dimensions of diversity issues: work/life balance, training programmes, etc.’

Moreover:

‘The “development reviews” that take place each year to review the evaluation process used by managers, which is part of [the company’s] human resource policy, have played an important role in monitoring the promotion process for both men and women, and in overcoming potentially stereotyped attitudes.’

## Key points

The research shows that overall some action is being taken in each of the four areas analysed, namely: recruitment and selection; professional development; the organisation of work and the equality environment.

However, it appears that organisations that have been undertaking equality action for longer, do so in all four areas simultaneously, whereas those with less experience tend to concentrate on one or two areas. There was also a tendency to concentrate on particular issues, such as the reconciliation of work, family and social life, and cultural change; and/or on specific target groups, such as women in white-collar employment or technical positions and/or women at management level.



This focus appears to have been influenced by a combination of:

- national laws and programmes;
- collective bargaining;
- a focus at European level on work/life reconciliation, translated into the national contexts;
- a tight labour market, with an increase in both the participation of women and dual-income couples
- a competitive marketplace, emphasising the need for flexible and customer-oriented organisations.

There is little evidence in the case studies of equality being built into a redesign of work. The organisations appear to be focusing more on reconciliation measures. Yet it is unclear how successful their efforts have been, and several cultural and structural barriers appear to block the achievement of this objective in practice. The detail provided suggests that achieving a balance between working life and personal life requires a holistic and flexible approach that can provide different solutions for different employees in a changing organisational environment; and that negotiations between the social actors at company level would be useful to ensure that these solutions do not impact negatively on employee rights.

There also appears to be an important role for trade unions in ensuring that overall equality efforts include lower-level white and blue-collar workers as well as women in technical and managerial positions.

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## Chapter 5

## The process for implementing equality action

The research guidelines presented a hypothesis that stated:

*By following a process of implementation which contains a series of specific steps, organisations are better able to ensure effective results for equality policies, procedures and practices.*

This hypothesis was drawn from the results of the research presented at the Como Forum (Shapiro *et al.*, 1995), which highlighted the following steps as critical to the achievement of successful equality outcomes:

- Analysing and seeking to diagnose the source of problem areas as regards equality within the organisation.
- Setting goals for equality action (these may be qualitative and not necessarily quantitative) and making a plan to achieve them.
- Mobilising and organising the different actors to be involved in the equality process, including women and men employees, trade unions/works councils, line management and senior management.
- Ensuring that the appropriate investment is made in time, money and people.
- Monitoring and evaluating the results of all equality action.
- Communicating the outcome of this monitoring and evaluation to the appropriate actors, both within and outside the organisation.
- Using the results of the monitoring and evaluation to undertake fresh analysis, set new goals and make new plans.
- Maintaining interest in the issue of gender equality throughout the company.

These steps should not be viewed merely as elements of a prescriptive implementation procedure which in itself can make the difference between good and bad equality processes. Our hypothesis is that in order to be effective, the establishment of equality in organisations must be rooted in and must mirror other organisational processes aimed at innovation. Therefore we refer to the implementation steps as the key ingredients most likely to ensure effective change.

The case companies provide fairly heterogeneous evidence on the implementation processes followed. Evidence drawn from some cases, particularly at the initial stage, shows that a well-structured implementation process has been crucial for effective equality action.

In organisations with more longstanding equality experience, there is evidence that the implementation process was well defined in the initial phase, but that at present, particularly where equality is mainstreamed or close to being mainstreamed into overall organisational strategies, policies and practices, only a few key steps or methods are identifiable.

The absence of specific implementation steps is explained in some cases as an indicator that equality *is* mainstreamed into other organisational activities. In UK case A (insurance), for example:

‘(the company) doesn’t regard itself as engaged in explicit equality action or actions, but rather as incorporating equality into its other activities, particularly in relation to training and employee development, and in relation to working time ...’

For these reasons it cannot be said from this research that particular process ‘steps’ have been followed in all the cases. More accurately, there appears to be a set of methods and tools for establishing gender equality in the workplace, and as this chapter will show, the case companies do not all use the same key ingredients, nor do they use them in the same way. Multiple methods can be applied. On the other hand, as we shall see here, omitting a key tool or method or approaching it in a particular way has implications for sustaining equality over time.

It should also be pointed out that the extent to which the case companies followed an explicit implementation process tended to be influenced by both the type of action undertaken and whether or not this was supported by a national programme. The French and Spanish companies, for example, tended to exhibit a more explicit implementation process, guided by their respective national programmes.<sup>7</sup> Those cases implementing action focused on a particular issue or target group also tended to follow a more explicit process.

Even where an explicit process was not followed, many of the key methods and tools could still be detected, for example in Italian case B (IT) or UK case C (retail). When the content of equality action is broader – as in these cases – the implementation process appears more implicit or embedded in everyday activity.

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<sup>7</sup> For example, the steps set out under the *Optima* programme include: (1) analysis and diagnosis; (2) action plan design; (3) the mobilisation of the actors; and (4) the implementation of the measures proposed by the action plan.



A clear weakness in many of the case studies was the lack of monitoring and assessment by the company of the results of the equality plans. This made it difficult and in many cases impossible to analyse the relationship between the processes followed and the results achieved. However, the national researchers were able to draw on the reflections of the key actors in the companies and add their own analysis of the processes involved.

### Key ingredients

#### Analysis of problems

Problem analysis is a preliminary step for identifying opportunities and constraints within the organisation, so as to define objectives and plan the process of change. It is a useful way to prepare the ground and ensure the involvement of key actors: women and men; managers and middle managers; company and union representatives.

Around two-thirds of the case studies refer specifically to such analysis having been undertaken with a view to identifying the root causes of equality problems and defining appropriate action. It provided the companies with both a starting point and a point of comparison for future analysis and measures, and allowed corrective measures to be identified.

This analysis was broader in some cases than in others – particularly in the initial stage of the process – involving actors and issues right across the organisation. For example, in French case C (IT) and Italian case A (retail), a combination of approaches was used to try and gain as full a picture as possible of the existing situation, from which to move forward with equality plans. This not only involved direct communication with women employees through interviews or surveys, but also a review of relevant policies and a quantitative review of the position of men and women in the workplace. The Italian case also shows how aspects of organisational culture can be analysed during this step:

‘The problem of the under-utilisation of women was explored from an organisational and cultural point of view. The various aspects studied, together with their interconnections, enabled a picture of the woman worker’s professional situation to be sketched. In order to create a map of the forms of discrimination and inequality experienced, the following problem areas were looked at:

- organisational and human resource development strategies;
- human resource management policies: recruitment, the path of professional development, appraisal systems, links between work regimes and productive areas;
- perceptions, as expressed by the various actors and subjects involved, of the values, models and stereotypes present in the corporate culture, including sources of possible discrimination;
- women’s relationship with work in terms of professional identity models, attitudes and career development.’

In other cases the analysis focused on a specific target group or problem area, e.g. German case B (financial services) where action is taken to increase the number of women in managerial positions:

‘Investigating women’s and men’s career development is a first step ... an internal survey ... An “assessment of women in senior positions” [is carried out] ... Interviews are held with women in management positions at the first three levels in all regional banks. The aim is to find out their reasons for pursuing – or obstacles in the way of – a successful career in the bank. The interviews try to find out what the women’s intentions are; whether they want to take the next step or not, and if not, why not?’

### Goals and planning

Each of the organisations in the case studies set themselves equality goals and drew up plans to achieve them. In some cases these were focused on specific projects, such as the professional development of women in one functional role in the UK financial services company (case A). In others, they were broader, concerned with creating an equality environment and culture, as in the Italian IT firm (case B).

The goals set by the case companies included:

- Increasing the general recruitment of women in the organisation.
- Recruiting and developing women in areas where they are under-represented (technical areas).
- Increasing the number of women in management.
- Enhancing the professional development of women.
- Improving flexibility and the balance between work, family and social life.
- Bringing about a change of culture to support gender equality.
- Ensuring equal pay.

As the list shows, and as the previous chapter on the content of equality highlighted, around half of the case studies were concerned with cultural change as a means of supporting equality. This shows that equality goals cannot be reached through policies and procedures alone. It also suggests a move to extend the equality process with a view to making it continuous, by aiming to achieve the cultural change that underpins the long-term sustainability of equality.

The other most commonly mentioned objective (also discussed in more detail in the previous chapter) concerned introducing flexible work options and enabling women and men to balance their work and their home lives.

All of the case studies illustrated the continued need for action on promoting women to managerial and senior-level positions, a goal being pursued in most of the companies. Far fewer, however, had made the professional development of *non-managerial* women a priority. Where it was, such development tended to target blue-collar rather than white-collar employees. Notable exceptions were Italian cases B and C (IT and white goods manufacture), UK case A (financial services) and German case C (the public service), where – perhaps because of the large numbers of women working in administration in these sectors – women’s professional development had been made a priority.

Similarly, while European data suggests that pay inequity between the sexes persists despite the EU directive on equal pay for work of equal value, overcoming this was a stated objective in only four of the case companies, two in Finland and one each (both in the public service) in the UK and Germany.

### **Integrating equality action and human resource management**

The role of human resource management (HRM) is a recurring theme throughout this report. In discussing motives for pursuing equality (Chapter 3), innovative HRM was referred to as providing both a stimulus and an important foundation on which to build equality. In Chapter 4 (on the content of equality action), we saw how reviewing and creating new HRM policies, procedures and practices – particularly as regards professional development – can contribute to equality. As regards the implementation of equality action also, we find that the majority of the case studies show how HRM and equality can be linked in practice.

Two main approaches to integrating equality and HRM were identified: first, in the context of a specific action/initiative; and second, as a means of supporting business strategy.

### **Linking equality and HRM to implement a specific measure**

In companies adopting this approach, the link between equality and HRM is the more traditional one. HRM and its processes are drawn upon on to implement a specific measure, aimed, for example, at achieving more flexible working time for women and men, encouraging and enabling women to return to work after maternity leave, and overcoming vertical and horizontal segregation. Specific HRM procedures and practices may also be reviewed in order to remove gender inequities.

The disadvantage of this approach appears to be its limited capacity to extend the good practice and knowledge gained throughout the organisation, and/or to sustain equality in the longer term.

### **Linking equality and HRM to support business strategy**

In the majority of the case studies, however, HRM was seen as having a critical support role to play in fulfilling the organisation's business strategy. Equality is explicitly referred to as an element of this process. In these cases, equality is often described as being 'mainstreamed' into the organisation's policies.

An example is French case A (food preparation and packaging):

'A structural link between the equality plan and the firm's strategic goals has been instrumental in achieving effective equality outcomes. The equality plan is integrated into a fully fledged strategic action plan, which involves stated economic, commercial, human resources and training policies and professional equality. Professional equality has been integrated into the "mainstream" of the firm's strategic development.'

In case C (IT) in France, the company's 'Global Diversity Vision' model explicitly supports the company's overall strategic plan and extends responsibility for undertaking equality action throughout the organisation.

In the 2000 Annual Report of case company C (retail) in the UK, the company's directors refer to the importance of equal opportunities, in enabling all the staff to reach their potential, as a means of guaranteeing 'First Class Service' to customers. This is supported by a recently initiated 'Diversity Project', which enhances women's career opportunities and enables the company to draw upon an untapped pool of female labour to fill middle and senior management positions.

Establishing a link between equality, HRM and business strategy does not mean, however, that there is no longer a need for specific, targeted equality action, as other examples show, e.g. Italian cases B and C (IT and white goods manufacture). Case C is interesting in that the process of implementation is based on action focused on a specific group of women. Overall, however, these initiatives are explicitly and closely linked with company-wide innovation measures aimed at achieving competitive goals. As the Italian report states:

'One aspect that certainly enabled positive results to be achieved was the integration of equality into the company's policy on organisational change and innovation in human resource management.'

Case A (IT) in Spain, while influenced in undertaking equality action by the national *Optima* programme, also saw it as an opportunity to develop its HRM to support the company's competitive strategy.

In the past, equality processes that regarded equality as an 'additional' organisational issue – marginal to the company's core business – have been criticised for their failure to sustain equality action over time (Shapiro and Austin, 1996.) The evidence from the present research suggests that linking equality to organisational strategy by means of HRM has significant advantages for attaining and sustaining equality. The recognition of the centrality of equality in achieving core strategic goals makes it more likely that these firms will take equality into consideration when implementing change, and may encourage them to maintain action as and where required. This hypothesis will need to be tested over time, however.

### **Problems with 'mainstreaming' equality**

As already indicated, linking equality to HRM as a strategic tool for supporting business strategy is referred to by some companies as 'mainstreaming', an approach that can yield successful results. Case B (IT) in Italy, for example, heavily influenced by its US parent company, has regarded gender equality as being important to business (at least in principle) since the 1930s. This has resulted in the company culture being modelled on egalitarian principles. While over the years the company has implemented specific equality action, today:

'... no formalised equality policies are applied in the processes of staff selection and appraisal and assessment of potential. Equality is regarded as something that forms part of the corporate culture, and as such, [is seen as] a shared value that automatically governs the everyday practice of the entire workforce. In order to maintain these guiding principles, "recommendations" are issued as a means of keeping alive the values which underlie the corporate culture ... Gender equality is

informally/softly but effectively mainstreamed into overall policies, procedures and practices ...  
The approach used might be described as a form of soft monitoring which seeks to marry the realities of the labour market with company objectives and values.'

Indeed, the company has seen positive improvements in its equality results, including a doubling of the number of women at all managerial levels. Equality challenges remain, however, including issues related to flexibility and overcoming the 'glass ceiling' at the most senior levels. But as equality has been linked for years with overall corporate strategy, a positive mainstreaming approach has developed from specific corrective action undertaken as and when required.

As the research cases show, however, the view that an organisation can *progress* to successful mainstreaming once it has undertaken certain equality action and achieved some positive results, does not always prove valid. Case B (in the public service) in the UK highlights the potential disadvantages of this approach where equality is not explicitly aligned with corporate strategy and cultural development. The organisation made equality a priority issue and dedicated physical and financial resources to it. Now:

'... gender equality is no longer the most pressing issue to which case B is addressing itself, and some managers argue that gender equality is mainstreamed in all its policies and practices (although this is disputed by others). Equality is principally pursued through non-discriminatory employment practices and flexible working arrangements and working hours.'

In this case, the mainstreaming of equality action appears to have worked less well, with the maintenance of interest in gender equality less sustained. This can be directly attributed to the abolition of the specialist equality team, accompanied by a decentralisation of HRM, together with the fact that in the present phase, race appears to have a higher political priority than gender. These factors are exacerbated by the lack of systematic monitoring and evaluation of departmental activities.

### **The involvement of the various actors**

All of the cases refer to how support for the goals of equality was gained from the different actors within the company. In the majority, trade unions and/or works councils; senior managers; line managers and both female and male members of staff were among those involved in the planning, implementation and review of equality plans.

### **Management**

Gaining senior management support for equality plans is critical to their continuation and funding, and was present in the majority of cases. Case B (IT) in Spain noted that underpinning the success of the equality plan was:

'That all of the management team is convinced of the need for a programme of this nature, and becomes involved in its development.'

In a minority of the case companies, line managers were assessed on the achievement of equality objectives as equality plans became part of normal management procedures, e.g. in French case C (IT). This is a good way to guarantee line managers' continuous involvement and ensure that equality becomes a priority for them.

Line managers and other staff in the companies were engaged in the process through training and awareness seminars also, as well as through consultation by means of focus groups and/or surveys.

### **The social partners**

As previously stated, in cases A and B in France and cases A and C in Italy, collective agreement on equality plans was a prerequisite for gaining public financial support. It appears, however, that strong social partnership already existed in these companies, so that this approach came naturally to them. Collective bargaining also made a marked contribution to the equality process in the Dutch, Finnish and German cases in particular.

In companies where equality action results from social partnership, equality policies tend to develop along two complementary channels. With the first, while overall equality goals may be established, specific measures are negotiated and/or are jointly managed by the social partners. Generally speaking, such action tends to focus on a range of bargaining issues established at company or national level. The breadth of the action may depend either on the degree of shared ownership of equality between employee representatives and employer, or on the degree of institutionalisation of the industrial relations system.

The other channel is characterised by a process of integration of the gender dimension into either specific HRM tools/practices or overall HRM procedures.

It is interesting to note the comments made in Italian case A (retail), however, as regards social partnership. In this company, the collective bargaining process focused on traditional women's issues, such as maternity agreements – but went beyond the legislation. The agreements went on to establish an equal opportunities committee and to focus on issues of women's development.

On the one hand:

'The creation of an Equal Opportunities Committee, which was provided for under the company agreement, encouraged the emergence of a sensitivity on the part of the enterprise to the problems of the under-utilisation of women's potential and the rarity of women at managerial levels.'

On the other hand, however:

'... even in a favourable context ... the union's commitment seems to stop short with the actual agreement reached between the parties, leaving the initiative and the development of action to the company side.'



Conversely, there are clear indications, particularly in German case A (transport) and Italian case C (white goods manufacture), that the role of the unions does not stop at collective bargaining on issues of flexibility and childcare. In these case studies, the bargaining process has led to a recognition at company and union level that women's potential in the workplace is being under-utilised.

In the German case, it was the initiative and driving force of the union that led to the creation of an equal opportunities representative and a 'representative for women's issues'. This finally led to the commitment of management as well.

In Italian case C (white goods manufacture):

'The Joint Committee ... thought it strategic to take action to influence the organisational culture of top management in both the company and the unions, which exhibited very similar attitudes and methods in relation to tackling, discussing and evaluating the work of women and men.'

To this end, information and awareness seminars were held, addressed to company personnel managers, territorial union leaders and members of RSUs (workplace-level combined union bodies) ...

In addition, four seminars addressed jointly to the social partners were held during the development phase of the project: one to launch the research results and three targeted at the subcommittees that were being formed in six company units with more than 500 employees.'

This case also shows how social partnership can be maintained over time:

'In case C, the equality agreement at corporate group level results from and is based upon an innovative participatory industrial relations model, expressed through five closely interrelated systems:

- The knowledge system (sharing information).
- The bargaining system (as an opportunity for business success, rather than a constraint on competitiveness).
- The system of consultation (disclosure of information on industrial and organisational choices and union consultation).
- The active control system (a number of joint bodies in charge of implementation, control and monitoring; joint initiatives to manage and develop social areas in the building of a total quality business).
- The active regulation system (to settle potential conflicts arising from the application of collective agreements and the management of the industrial relations model).

The Joint Equality Commission, which was created and empowered in the initial phase at corporate level, included union and company representatives in the highest decision-making

positions (national secretariat members and top managers), and operated within the above framework. This was a powerful factor in the initiation and development of the first phase of equality action, and in promoting a top-down process – involving both company and union representatives at the different levels – aimed at building an equality environment. The more decentralised structure present in all the company’s units was set up later to ensure the long-term sustainability of equality action.’

While collective bargaining is not a prominent issue in the UK cases, it is important to note the context of social partnership in case C (retail) where:

‘The partnership agreement broadens consultation and negotiation between company and union beyond the traditional collective bargaining agenda of pay and conditions. It includes a commitment to quality training, a sharing culture and values, and having a conscience.’

Thus, as shown in Chapter 3 (on the motives underlying equality action), collective bargaining at company as well as at national level is important in ensuring that certain equality issues are on the organisational agenda. However, there also appears to be much to be gained in ensuring the continuity of equality action, which has the positive impact of widening the social partnership approach beyond collective bargaining.

### **Committees/groups**

In about a quarter of the case companies, the different actors were brought together in equality committees. These appeared to assist in the smooth implementation of equality plans through the different groups represented: trade unions and works councils, line managers, senior managers, female/male staff. The monitoring of the results of equality action – a lack of which was an overall weakness in the case companies – appeared to be more common in organisations with equality committees, suggesting that they may be important in the expansion, impact and continuity of equality action within the organisation.

### **Involvement of women**

Women themselves were described as mobilising to promote equality action in a small number of cases. For example, in the Netherlands, case B:

‘Since the mid-1990s, a women’s network is active in the company. The company supports this group, among other means by providing a part-time secretarial assistant.’

Women also played an important role in the initial analysis stage of the equality process in some cases. For example, in Italian case C (white goods manufacture):

‘A cognitive survey was carried out among a sample of 600 women and 100 men in all of the group’s plants, in order to reveal the characteristics and requirements of the female workforce ... The presentation of the questionnaire ... was handled by members of the committee, who paid visits to the various plants, with the necessary time allowed them by the company, in order to

explain the reasons for the survey ... and ... compile the answers. This face-to-face method was chosen so as to establish a direct relationship with the people and to stimulate general thinking on women's issues, as the female union leader confirms: "This method ... made it possible to relate to people directly, both women and men, and also to discuss problems which principally concerned women."'

Also, in German case B (financial services) the involvement of women in the initial analysis stage led to them exerting pressure at senior level for specific action:

'Several workshops took place, to which women already in management positions, and potential candidates, were invited. These workshops were a forum for discussion, analysis of the situation and the development of concepts. A group from the workshops approached the board with their proposals. The group asked for financial and personnel support. One result was the creation of the part-time (50%) post of diversity manager, and the appointment of a diversity expert to carry out a survey.'

These cases illustrate the important role women play in influencing and shaping action to improve gender equality at company level. Given the weak monitoring of results as regards equality action in the case studies, it is important that women continue to be encouraged to raise issues of key importance to them.

### **The role of funding**

In all of the case studies it is clear that financial and human resources have been invested in equality. This is guaranteed in the cases supported by public programmes, such as A and B in France, the *Optima* cases in Spain and (partially) cases A and C in Italy. It is important to consider, however, the extent to which equality action is dependent on external financial resources in these cases. In other words, will action stop when the funding ends?

In Spanish case C (distribution) the national report notes that emphasis has been placed on the implementation of measures rather than on continuity. The inference is that action may not continue beyond the *Optima* programme. Other cases, however, show that national programmes can provide an initial investment that is then continued by the organisations. For example, in French case B (food manufacture), positive results from the equality plan undertaken with some investment from the national fund:

'have led to a "contract for professional equality" with the *Secrétariat des Droits des Femmes*, leading to financial support being added to that provided by the National Fund for Employment.'

In Italian case A (retail) also, the positive results achieved by the equality plan/action supported by 'Positive Action Law 125' led to the board of directors approving the establishment of an ongoing fund for equality, to be administered by the Equal Opportunities Committee. Significantly, the allocation of these funds is closely linked to evaluation of their impact and the effectiveness of the equality action:

‘The rules governing the Fund contain two preliminary declarations, one concerning the company’s intention to give continued support to forms of positive action which reflects their conformity with legislative provisions and their considerable cultural and democratic significance, and the other giving formal recognition to the Equal Opportunities Committee as the appropriate and main body for the planning and implementation of such policies. The solution decided on for this purpose, which seeks to combine the need for the Committee itself to have autonomy and direct responsibilities, the need to create a flexible and not excessively bureaucratic instrument and the need to make financing available for very clearly identified purposes, is to open up a special item in the company budget and define its financing annually on the basis of a three-year programme, and also the activities which are not eligible for financing from the Fund; in particular, they prohibit any use of the budget specially allocated to active policies for the Committee’s ongoing and ordinary activities. There is, however, a provision for compulsory expenditure on assessing the effectiveness of the actions introduced. This is an element of great importance in the economics of an innovative project of this kind. The accountability factor is reinforced by a requirement to prepare a statement of accounts at the end of every three-year period, on pain of blocking approval of the financing for subsequent years.’

Investment also appeared to be ensured in cases where there were close links between equality and overall strategic objectives, as in case C (IT) in France. This may be a key factor – as mentioned earlier in this report – in ensuring that equality is sustained over time.

### **Monitoring**

Together with communication, monitoring is the weakest element in the equality process in the cases presented. In few of the case companies was there a comprehensive equality monitoring system in place to check access (by gender) to recruitment, selection, promotion, and training; while some specific projects were not monitored at all for results.

Focused initiatives were more likely to be monitored and assessed than broader action. This is illustrated, for example, in French case A (food preparation and packaging), which focused on the professional development of blue-collar women workers:

‘Monitoring ... has been carried out every year, assessing the number of women engaged in training activities and the progress achieved by each individual woman. ... also ... by noting how many women have succeeded in moving to a different rank.

Broader approaches to monitoring are evident in many cases, including a review of the numbers of men and women at different hierarchical levels in different parts of the organisation, and a review of staff satisfaction, by gender, based on survey returns.

While these forms of monitoring may indicate that a problem exists, however, it tells an organisation very little about the underlying causes. More in-depth monitoring and assessment (for example, of recruitment and selection or promotion and training procedures), would be required to do this, as well as qualitative monitoring of women’s and men’s experiences in the workplace.



The Spanish report in particular commented on the lack of monitoring, emphasising that the fact that the *Optima* programme concentrated on short-term projects tended to discourage monitoring and an approach based on continuous improvement. In case C (distribution), for example:

‘There is neither a mechanism to monitor results nor any evaluation of results to help the management team understand the impact an equality plan can have ... so as to make all the necessary tools available to create a new plan if necessary.’

In contrast to *Optima*, the *Opportunity in Business* programme in the Netherlands provided a tool for some monitoring in case A (financial services). Participants in the programme take part in an annual survey of progress and results as regards equality. The results from each company are benchmarked against each other. Similarly, the public programme in France requires some monitoring of progress and results. In Germany, the case companies that had earned the *Total E-Quality* award had emerged successful from the assessment process. The drawback of monitoring linked to national programmes, however, is that it appears in some cases to be undertaken to meet the requirements of the programme and/or funding – and not for internal learning purposes. German case C (public service) is an exception. This organisation viewed the *Total E-Quality* report as helpful in providing a scheme that can be regularly updated. However, many of these companies appeared to view the assessment as the end of the process, rather than as providing them with information on how best to move forward with their equality plans.

The lack of comprehensive monitoring appears from the case studies to be one of the biggest barriers to sustaining equality action.

### **Communication**

Communicating information on the goals of equality plans and the progress made is critical for involving staff across the organisation in the process of culture change, and in developing their understanding of equality. Communicating progress can also help maintain a commitment to equality and provide the impetus for further action. Yet only around two-thirds of the cases referred to mechanisms for communicating information about equality within or outside the organisation.

Internal communication was achieved mainly through:

- the intranet;
- bulletins/articles in internal magazines
- equality seminars, training, publicity events.

The intranet appeared to be important in most of the case companies. As noted in Chapter 4, it is also an important medium for promoting transparency in an organisation, through better communication on key issues and the open advertising of posts, for example.

External communication was greatly helped by some of the national programmes such as *Optima*

in Spain, *Opportunity in Business* in the Netherlands and *Total E-Quality* in Germany. Participation in these programmes often attracted ‘free’ positive publicity as regards equality for the firms. This was described as also having a positive effect internally.

## Key points

Once again, national equality programmes and legislation are found to influence the process of implementation of gender equality action in the workplace. Overall, such influence was found to be positive, by introducing a structured method of implementation for equality plans. This included the monitoring of results – in general the weakest aspect of the equality process in the case studies. These programmes are therefore important in guiding and motivating organisations to ensure that gender equality is effectively put in place, and that a longer-term view is adopted so that the results and the lessons of the process can be disseminated throughout the organisation and contribute to further action.

The case studies suggest that a more structured approach may be more appropriate where organisations are implementing a specific equality programme, action or project; a structured approach was less likely to be in place where equality was embedded in overall processes, policies and procedures.

Two observations can be made here. Firstly, in the cases where equality was described as being more embedded in the organisation, several of the key implementation methods and tools involved could be detected from the descriptions. These included:

- analysis
- goal-setting and planning
- integrating equality into HRM
- involving and mobilising the different actors
- ensuring investment
- monitoring results
- communicating results.

Where the majority of these could be identified, and the organisation had made an explicit link (through HRM) between equality and core strategic goals, a solid foundation and approach had been established for the successful and sustainable achievement of gender equality. In this situation, a comprehensive equality process exists.

However, ‘embedded equality’ sometimes appeared to be associated with the *absence* of some of the key implementation methods and tools – monitoring and communicating results, for example. Given the importance of these elements in ensuring effective results and maintaining gender equality in the workplace, it appears that the ‘embedded approach’ can entail some critical flaws.

This report suggests that while there is much to be gained from embedding gender equality in core organisational processes and policies, few organisations are yet in a position to become



relaxed about it. Key problems such as equal pay, women in leadership and women in technical, non-traditional roles still have to be overcome.

It is therefore imperative that organisations be clear about their own situation with regard to these and other issues; that they have a plan to overcome any gender inequalities; and that they be able to continually assess progress and learn. This, however, clearly requires some kind of explicit process.



## Chapter 6

## The outcome of equality action

The project guidelines presented a hypothesis stating that:

*Undertaking a comprehensive assessment of the results of equality action will contribute to sustaining equality action in the longer term (by identifying where further action should be taken), and will promote greater understanding of the widespread need for equality and of its contribution to organisational success.*

As noted in the previous chapter, a critical weakness in the implementation process in many of the case study companies was the tendency not to undertake a comprehensive assessment of results. In practice, this has two major negative implications. Firstly, companies may lose out on the opportunity to disseminate information on progress on equality both within and outside the organisation. Such communication is an important element in raising awareness, understanding and commitment to equality within the company. Secondly, a lack of assessment means that no learning is drawn from equality efforts, limiting their effectiveness and making it difficult to decide how best to approach the issue in the future. As Spanish case A (IT) notes:

‘The positive results obtained over the last few years have still not generated a search for new objectives or a new plan to give direction in the years to come.’

In some of the case companies it was argued that assessment was hampered by the fact that equality plans have not yet been in place for a long enough time, as well as by the lack of suitable instruments for measuring cultural change. Such analysis as was undertaken, however, by the companies and the national researchers, has shown important results that can be broadly viewed under two headings: the impact equality action has on employees (both sexes); and its impact on the organisation.

## Impact on employees, women and men

### Increase in the number of women recruited

Despite the difficulties many of the case companies have experienced in overcoming horizontal segregation, a majority are achieving success in recruiting increased numbers of women. This reflects the overall European trend for higher levels of female education and the greater participation of women in the labour market (European Commission, 2000b). In the present research, the increase in female recruitment is particularly marked in male-dominated sectors such as IT.

In French case C (IT) women's share of recruitment has increased from 23% in 1996 to 50% in 1999, and is higher than the share of female applicants. The number of men recruited in the same period decreased by a third. This change has had a visible impact on this site, where women now make up 38% of the staff.

In Italian case B (IT) the number of women recruited has increased from 25.4% of total recruitment in 1995 to 37.4% in 1999. Similarly, in Italian case C (white goods manufacture) female employment rose from 25.2% of the total workforce in 1992 – the year in which the positive action plan was launched – to 43.2% in May 2000. It is interesting to note that in both cases women's employment has shown steady growth despite an overall reduction in the workforce.

Finnish case C (public services) has also achieved an increase in female applicants for traditionally male roles.

However, it should be noted that not all of the case companies experienced an increase in female employment. There were examples, such as Finnish case A (manufacturing) where the overall number of women *decreased*, a fact attributed by the national report to the unsuitability of shiftwork to women.

### Increase in women at professional and managerial level

The majority of the case studies showed that since equality efforts began, the numbers of women progressing to professional and managerial levels have increased to some extent. This is generally linked to labour market trends, which are encouraging organisations to proceed in this direction.

Italian case B (IT) perhaps demonstrates the improvements that can be gained from long-term action. Its commitment to equality spanned more than a decade and included not only specific equality initiatives – at times aimed at promoting women to more senior positions – but also the integration of equality into the organisation's culture and HRM approach. In the five-year period 1994-1999, case B saw a doubling of the percentage of women managers and professional staff. The proportion of women managers increased to 10% and the proportion of female professional/managerial staff increased to 15%. Similarly, in case C (white goods manufacture), where again, equality action had been taking place for almost ten years, the overall increase in

women meant that the proportion of women in supervisory roles had gone from 22% in 1992 to 33% in May 2000, while the number of women in management had increased from 4.6% to 14.9%.

French case C (IT) shows great progress in the percentage of women in supervisory and managerial positions:

‘Since 1997, this has evolved slowly, going from 21 % to 28% for supervisors, and from 11 % to 13 % for managerial posts, while the total number of managers has decreased.’

Spanish case B (IT) shows a direct link between equality action and the increase in the number of women in management:

‘Company B, stimulated by the *Optima* programme, has increased the proportion of women in management ... it received authorisation from head office to recruit women externally to management positions in finance and sales, as via internal promotion it would have taken years for women in this category to achieve a better position.’

What this case illustrates is that an increase in women in management can result from the internal professional development of women as well as from external recruitment, which also reflects an improved recruitment and selection process.

Despite all the above, the figures provided by many of the companies show that this is an area that still requires further work, as many organisations do not yet have a representative number of women in management, particularly at senior level. For example, female managers in another male-dominated organisation, German case A (transport), have increased, but this has been slow and improvements are still needed.

The issue can be particularly problematic in technology companies, where access to senior positions tends to be linked to progression up a technical career path – at least in the early stages of an individual’s career. In most of these companies, as illustrated in the case studies, fewer women than men have the technical qualifications and experience.

In companies such as Dutch case A (financial services), which have achieved marked improvements in the percentage of women in middle management positions, it remains to be seen if – as the company believes – progression to senior positions will follow in time. Previous research would suggest that there are several barriers to overcoming the ‘glass ceiling’ between middle and senior management, and that progression may not follow as a matter of course in the absence of specific equality action (see Acker, 1992; Gherardi, 1995; Metcalfe and Leighton, 1989; Shapiro, 1997; Teknik, 1992.)

### **Increase in women in non-traditional areas**

Many of the case studies described organisations with marked segregation not only vertically but also horizontally. Women tended to predominate in non-technical areas: either white-collar

administrative positions or low-skilled blue-collar jobs. A minority of the equality initiatives were aimed specifically at overcoming this segregation and moving women into non-traditional areas. In other cases, overcoming gender segregation was part of the wider equality ethos and objectives.

For example, in Italian case C (white goods manufacture):

‘The redefinition of professional profiles which took place in the context of policies on innovation in personnel management has enabled women to gain access to areas where they had been very rare or totally absent: research and development, manufacturing, logistics and purchasing, and process engineering. Access to these areas is doubly important since they are the starting point for a managerial career.’

In Finnish case C (public services), there is a focus on recruiting more women into male-dominated jobs. Over the 1990s, applications for training for these jobs have increased from 1,890 to 3,679 per year. The proportion of women applicants has also increased, from 28.3% to 36.1%. The number of women trainees accepted has increased from 13.5% to 33.3% per year.

Spanish case A (IT) is beginning to see some results from its efforts to increase female technical personnel from 18% to 42%. It is important to note that this organisation has put the foundations in place so that when recruiting to this area, equality is now considered an important objective. Incorporating equality into the recruitment process has already yielded positive results for the company:

‘The Human Resources department is aware that by modifying the selection criteria it receives a higher standard of candidates than previously, as in general, women finish their studies before men and broaden their experience in fields that complement IT ... Finally, we consider that for the company the recent entry of women to technical positions has shown good results ...’

Despite these positive examples, other cases, such as German case A (transport), illustrate the continued difficulty of overcoming horizontal segregation. This company has been able to increase the percentage of women in a particular male-dominated position by only 1.5% in ten years, although the percentage of female trainees in this area has increased by 3.2%. Also, the proportion of women apprentices in technical occupations has not changed over the same period.

Contradictory forces appear to be partly responsible for the difficulties in recruiting women into non-traditional areas. On the positive side, some of the research shows a change in the mix of skills and abilities demanded by companies, highlighting the value of soft skills and involving a rethink of company needs.

On the negative side, part of the difficulty in overcoming horizontal segregation lies with the education system and the subjects women pursue, which are themselves influenced by gender stereotypes in the wider social system. French case B (food manufacture) highlighted the problems facing companies:

‘The issue here is the strength of “gendered” social determination as regards professional options at the level of society ... Girls rarely choose technical training in their basic schooling. The tendency is for them to pursue a CAP (first-level professional qualification) in such fields as sales, hairdressing, etc. (traditionally “feminine jobs”). This makes it more difficult for them to gain access to technical jobs when they enter the labour market unless firms take the initiative to train them for these non-traditional jobs.’

This is true for women in blue-collar jobs and higher-level technical jobs (engineering).

It is clear that technical education is an important factor in enabling more women to enter technical fields. However, as the literature on gender and technology illustrates, this is itself a complex issue, influenced by gendered cultures and stereotypes within both organisations and the wider society, i.e. the perpetuation of the stereotype that men do but women do not, should not and cannot do technical work (e.g. Cockburn, 1983; 1985; Phillips and Taylor, 1980, Van Oost, 1992, Wacjman, 1991.) These forces as well as the unattractive working environment of some technical areas can deter women despite equality efforts, as Finnish case A (manufacturing) showed.

### **Improved skills and career development**

While it can be said that only limited success has been achieved in the case studies in overcoming horizontal and vertical segregation, progress has been made in putting the foundations in place to help overcome this segregation in future. This has been achieved not only through increased training and development for women, or by creating conditions more suitable to the development of women, but also by means of a change in company values – referred to in many of the case companies – with a greater emphasis on ‘soft’ as well as ‘hard’ skills.

Many of the equality initiatives undertaken by the organisations included a focus on training and development, in some cases (e.g. in France) influenced by the national assistance programmes that provided funding for these activities. This may also reflect companies’ acknowledgment of the importance of a skilled workforce to sustaining competitiveness.

For example, case A in the UK (financial services) places great importance on HR policies in general and its training regime in particular, rather than focusing on what might be called explicit equality action. This case demonstrates, however, that this has improved the skills level and employability of women and men in all posts in the call centre studied. In addition, through a policy of equal treatment of full-time and part-time staff, the company has also ensured that part-timers – who make up the bulk of employees – are not discriminated against in terms of access to training and personal development. Such training has enabled women to move into supervisory and senior management roles.

French case A (food manufacture and packaging) describes the benefits of the training programme for supporting innovative forms of work organisation:

‘All the commercial assistants have acquired a better overview of the commercial process and a better understanding of the commercial dimension of their relations with customers. They know how to use software to follow up ... with the various customers and to establish key business indicators as regards these customers. One of the commercial assistants is preparing for a “Brevet d’Etudes Professionnel” [certificate examination] in office automation. Three of them have risen from the status of “administrative employee” to “commercial technician”, after having gone through a more individualised programme.’

Beyond formal training and a corresponding improvement in skills, the commercial assistants have developed specific expertise through a delegation process which has assigned them specific missions. They have enlarged the scope of their activity and are now integrated into strategic commercial team projects. Some, for example, have participated in the writing of a new sales pitch directed at wholesalers; others have been involved in a changeover of the software system used for commercial activities.

During a period of organisational change, this company was also faced with the choice of either retraining/redeploying existing staff or recruiting new staff with the newly required skills. Under the equality programme it chose to redeploy and build on the knowledge of existing women employees.

In another French company (case B – food manufacture and packaging) training and development has enabled women to undertake more technical tasks and roles. Italian case B (IT) shows that the mix of training and IT can ‘professionalise’ the traditional secretarial role into one that has clear organisational and support functions, while in Italian case C (white goods manufacture), professional development has opened up new career opportunities for women. Finally, French case C (IT) also shows positive results in terms of the increase in the number of women attending management and leadership training programmes.

### **Flexibility: balancing work and home life**

Improving flexible work options to enable women and men employees to achieve a better balance between work and home life, through equality activities and/or collective bargaining, was the focus of many of the case companies. Some were also specifically looking to improve childcare assistance and flexibility for working mothers to encourage and enable them to return to work and continue to develop their career after childbirth. Other companies wanted to tackle the issue of flexibility and work/life balance being seen as a matter concerning women only, and sought to encourage men to participate. As a result of these efforts, the case studies showed that:

- 80% of staff on parental leave return to work after a short period (e.g. German case B – financial services).
- 35% of part-time staff are men (German case A – transport).
- The reconciliation of work and home life is high on the agenda of many of the companies’ senior managers, and several different forms of working time flexibility are operated (UK case A – financial services).



- Financial assistance is provided to male and female employees for the costs of day-care, nannies or after-school care. Additional childcare costs incurred are paid during overtime (Dutch case A – financial services).
- The majority of women employees have their requests for changes in working hours met (Dutch case B – financial services).
- 80% of staff – men and women – have benefited from greater working time flexibility (Spanish case C – distribution).

Despite the progress that has been made, it is clear that the problem of balancing work and family/social life still has a long way to go before it is solved. The case studies show that while flexible work options have become more widespread for general staff, at managerial levels they are often not available; are impractical, given the managerial workload; or are regarded culturally as inappropriate for managers.

UK case A (retail) illustrates this problem, in a 24-hour working environment:

‘At management level, the problems of reconciling home and work life are even more acute. Section managers upwards work full-time hours (but flexibly, including periodic nights and weekends). In theory, they work a 38-hour week; in practice, they work considerably longer hours because of the demands of the jobs they do. These demands are particularly heavy in the 24-hour stores, where store management has to ensure that the store runs smoothly throughout the day and night. Women in the company report considerable pressure being placed on their family lives as a result of the demands of their jobs and the hours they work. Some women interviewed for this project reported that the hours they work strained or even destroyed their marriages. Work/life reconciliation is therefore still regarded as the responsibility of the employee and has not been systematically improved by the company.’

Cultural resistance to men in senior positions working more flexibly, by job-sharing, for example, was also noted in UK case B (public service).

Flexibility and part-time work also appear to be more generally unacceptable in some companies. For example, in French case C (IT), which promotes work/life balance, it emerges that in practice:

‘... the feeling is that pressure is still very high and the model of “total availability” is still very powerful. For many, the effectiveness of the initiatives aimed at facilitating a better work/life balance is in fact deeply related to the personal attitude of their own manager to this issue.’

The problem illustrated by the examples above is that while the policies may be in place, it is sometimes left up to individuals to try and make use of them in a very difficult and pressurised working environment.

Creating an environment that enables women and men at all levels to balance their work and personal lives is becoming increasingly important in the face of current and predicted social

trends. In Europe, these show an overall increase in the incidence of *both* parents of children continuing to work and having elder-care responsibilities – yet women continue to undertake 80% of all household tasks in all but the Nordic Member States, Sweden and the UK (European Commission, 2000c).

### **Helping women to help themselves**

A number of quality initiatives appear to have encouraged women to become more proactive in progressing their careers, articulating their needs and engaging in organisational life. They include training and development, mentoring and networking programmes as well as moves to shift the organisational culture so as to value women's skills and contributions more highly.

Italian case C (white goods manufacture), for example, shows how women become more proactive when empowered to manage their own training and developmental needs. Specific self-development and/or assertiveness courses, such as 'Springboard' in UK case B (public service), also help to enable women to become more proactive within the organisation.

In French case A (food manufacture and packaging), the development of a 'qualifications grid' for blue-collar workers enabled women to identify their skills level in relation to the grid. According to the Training and Human Resource Managers in the company, this has led them to be more proactive concerning their own professional development.

Women's networks have developed in French case C and German case B as a result of mentoring programmes, and in Dutch case A from the 'Network for Women in Higher Grades.'

These results are important, as women's networks and their encouragement in the company have been identified as having a key influence on career progression (Strober and Jackman, 1994; Davidson and Cooper, 1992; Larwood and Kaplan, 1980).

### **Impact on the organisation**

The three main positive effects of equality action on the organisation were identified in the case studies as: a change of culture; improved employee retention, attendance and satisfaction; and an improved public image.

#### **Cultural change**

Many of the cases referred to the 'change in culture' that had taken place within the organisation as a result of equality action – although these references were not explored or explained in great detail in the majority of cases.

Culture has been identified in equality and diversity research as representing a fundamental barrier to progress and the achievement of sustained change (see Marshall, 1984; Liff, 1989; Cassell and Walsh, 1993). As Ashburner (1994, p. 194) notes: 'Established organisational cultures and traditional management attitudes, plus the predominance of a male value system, can undermine the intentions of equal opportunities.'



Despite its key role, culture is an area that is frequently neglected by organisations in trying to bring about change – and equality appears to be no exception to this. Policies and practices, although they may be more concrete, are supported by the foundations of organisational culture, which are more conceptual. And while it may be understandable that managers tend to focus on the concrete rather than the conceptual, it is the cultural foundations of an organisation that can support sustainable change in policy and practice (Thomas, 1996).

It is important to remember that around half of the case companies referred to an objective of changing culture to support equality. In terms of outcome, however, the research contains limited data on this issue, which was just one of a number explored. Given its importance, any reference should nonetheless be noted, and examples of progress as regards basic assumptions and beliefs about women in the workplace are outlined below.

### **Improved perception of women's skills, role and value**

Several case studies referred to identifiable changes in the company in attitudes towards women's skills or assumptions about appropriate jobs for women. These often arose as a result of action aimed at overcoming job segregation or improving women's skills, and it is sometimes difficult to ascertain whether the changed perception was evident throughout the organisation or was limited to the areas targeted.

In UK case A (financial services), it was noted that: 'The exclusive allocation of jobs to women or men has been deliberately challenged.' In French case B (food manufacturing and packaging) the equality action:

'represented a break with the firm's past culture, where poorly qualified women were excluded from the benefits of training, professional mobility and promotion and also from technical know-how. Women workers have since been considered able to adapt to industrial evolution. The promotion of women in non-traditional jobs has also been an ongoing concern. In the traditionally masculine jobs in the baking department, there are now more women.'

In French case A (food manufacture and packaging) one woman commented on the changes brought about by the equality initiatives:

'Before, men would not admit that women were able to operate machines; now they have come to accept that we can do this job even when it implies some mechanical operation of the machines ...'

### **Greater awareness of the importance of equality**

The cases also described how both specific, focused initiatives and wider equality action resulted in a growing awareness among managers and staff as to why gender equality is important to the organisation.

For example, Spanish case A (IT) notes that participation in the *Optima* programme helped the organisation to generate debate and reflection on the issue of equality. This helped equal

opportunities to ‘filter down through the company’s culture’. Similarly, Spanish case B (IT) found that *Optima* had helped them advance their awareness about stereotypes and resulting gender inequality.

In firms that had been pursuing equality for longer, such as French case B (IT), it was noted that:

‘Diversity and equality have become totally legitimate topics and criteria for decisions, which does not appear to be the case for many other firms, which lack a diversity policy.’

In the Italian firms in this position, equality appeared to have become more firmly embedded in the wider organisational consciousness and culture. For example, in case B (IT):

‘... gender equality has become part of the genetic heritage, and for that very reason represents a kind of ever-present guideline in company actions.’

Also, in French case C (IT), where diversity is regarded as a core business/strategy issue, moves are under way to ensure that it becomes core across the entire organisation. This is being achieved by requiring each business division to have its own ‘Strategic Diversity Action Plan’.

### **Additional benefits**

Thomas (1996) argues that culture is the most problematic area in any kind of organisational change, and the one most likely to be neglected. He maintains that a diversity strategy that addresses the underlying cultural issues will be the one most likely to achieve change in the long term.

Several of the case studies note that a focus on equality helped to improve transparency in recruitment and selection procedures, e.g. German case company B (financial services). This yielded benefits across the company but particularly for women, who did not belong to existing networks and who tended to be excluded from the selection and promotion process.

In Spanish case A (IT) it was noted that participation in the *Optima* programme:

‘... allowed them to think not only about action to take in favour of equal opportunities but also about human resource management and ... a new company culture based on greater communication.’

The Spanish reflection is interesting as it might be argued that progress towards equality is dependent on human resource management as a company priority that is assessed and rewarded and on clear communication. The German and Spanish examples suggest that initial equality action begins to expose more deep-rooted barriers, which the organisation then has to decide whether and how to address.

### **Barriers to cultural change**

While these are promising examples of cultural shifts as regards gender equality, other case



companies offer examples of continuing barriers to such change, highlighting the complexity of this important issue. The previous section (on achieving a balance between work and personal life) has already referred to the cultural barriers that prevent policy from becoming embedded, particularly at managerial levels. The section on women's access to non-traditional areas, too, has discussed the role of culture in creating stereotypes as regards women's skills and 'appropriate' work for women. Other examples in the cases, such as the tendency in German case B (financial services) for 'men to choose men' in promotion, illustrate the persistence of male-dominated cultures.

UK case A (financial services) illustrates the problem of a male backlash to gender equality action. It shows in particular the importance of communicating the rationale for, detail of and progress with equality to all staff at all levels to try and elicit understanding and support for equality:

'... there has been a demonstrable backlash by men in lower-level positions [who are] resentful of the rate of promotion of women to management at what they see as being their expense. There is a formal organisational culture which promotes equality (or the idea of equality), but informally, there are employees who see equality as having already "gone too far". This informal culture thrives because the company does not regularly communicate its actions in this area to staff, and, equally importantly, it does not communicate the reasons why such actions are necessary. Many employees have a skewed view of women's position within the company, based on their own localised experiences, and have no alternative information on which to base their conclusions.'

### **Improved employee retention, attendance and satisfaction**

The two Spanish cases A and B (both IT) noted that in the areas targeted by equality action, absenteeism rates fell. This can represent important financial savings for an organisation.

The Spanish cases also referred to the positive impact equality action had on staff satisfaction levels. Case C (distribution) notes that the equality programme has boosted satisfaction and enhanced employee loyalty in both women and men.

Financial savings have also been reaped in Italian case B (IT), where the retention rate of female staff has improved as a result of equality action. Women are now more likely to progress to higher positions because of improved professional development. They are also more loyal than their male colleagues, who are more likely to move to another company.

### **Improved public image**

For many of the case companies, another gain following equality action – hard to quantify in financial terms – has been an improvement in public image. Public recognition for work on gender equality came to Dutch case A (financial services), when one of its branches was awarded the 'Emancipation Prize', delivered by the State Secretary for Women's Affairs, for its broad approach to equality and awareness of the need to balance work and personal life. The company also regards this prize, along with its participation in the *Opportunity for Business* campaign, as a means of attracting women in managerial roles.

The national programmes proved beneficial to the Spanish companies and to German case A (transport), in particular, in providing networks and events where the companies could not only learn from others but also publicise their own work. Spanish case A (IT) notes that the *Optima* programme has created a communications forum with clients seeking information about their equality plan. The programme has also led to an increase in customers as a result of a television advertisement financed by the Women's Institute, which highlighted the names of companies supporting equal opportunities.

Italian case A (retail), too, feels that it has benefited indirectly from positive reports about its equality initiatives in the local and national press, while German case A (transport) believed that its actions would improve the company's image with potential employees in the labour market:

'Improvements in the integration of work and private life will play an important role in view of the changed life choices of the younger generation. ... this will ... contribute to a positive assessment of the company in the labour market.'

## Key points

Positive outcomes for women and for the overall organisation resulted from equality efforts in the case studies. Substantial improvements were achieved in the overall employment of women – most notably in the IT sector – while in some cases the number of female managers doubled. A truly representative number of women in management, however, still remains to be achieved in most of the companies.

More limited success has been achieved in overcoming horizontal segregation. This was the case in spite of equality efforts in manufacturing, the public sector and IT companies. Most organisations are still experiencing problems in this area, hampered by a lack of appropriate qualifications among women, continued cultural stereotypes as regards 'appropriate' women's work and the reluctance of some women to enter non-traditional areas.

It is clear, however, that equality activities are laying the foundation for future improvements in overcoming both horizontal and vertical segregation, by improving women's access to professional development and by placing greater emphasis on the value of 'softer' skills. Better training and a greater appreciation of such skills are not always attributable to equality action alone: in some cases they result from a recognition that this can contribute to achieving and sustaining competitiveness – but it is nonetheless clear that women can be/are the beneficiaries. The importance of an equality approach is highlighted in one case, however, where the equality argument persuaded the organisation to retrain women staff in a new skills set rather than make them redundant and recruit people with the new skills.

The enhanced professional development of women also resulted in their becoming more proactive in managing their own careers, stating their needs to the organisation and networking with each other.



In the reconciliation of work and family/social life, several improvements resulted from equality action. The provision of flexible working conditions, in particular, appears to be high on the agenda in the case companies. Keen to keep women after maternity leave, they offer flexible work options and (in a minority of examples) childcare assistance. The full achievement of work/life balance still appears to be rather limited, however, since it is often viewed as a separate issue and sometimes as an employee benefit rather than as an integral organisational issue. In practice, long hours (in many cases the result of extended customer service/opening hours) often preclude women *and* men from taking up the flexible working options that exist in theory.

Cultural change is also high on the case companies' equality agendas, and while the national reports refer to it taking place, the evidence remains somewhat thin on the ground. There is some sign however, of:

- Changing perceptions of women's skills, value and role in the workplace.
- Greater awareness and understanding of the importance of equality in the organisation
- Equality action leading to wider cultural change which, in turn, supports equality, e.g. greater transparency in recruitment, selection and communication.

Such cultural changes were most evident in organisations that had been undertaking equality action for longer – at least three years – showing the importance of continuity and the long-term perspective required. In most of the companies, some cultural barriers to equality remain deep-rooted, such as the tendency for men to choose men for certain jobs.

The bottom-line benefits of equality action for the case companies were also clearly evident. They include a fall in absenteeism, improved staff satisfaction and retention rates. Associated benefits, such as an improved public image, were also experienced.

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## Chapter 7

## A model for tracking the development of equality

In Chapters 3-6 we deconstructed the twenty-one case studies and provided an in-depth analysis of gender equality in the workplace across four dimensions:

- The motives behind and influences affecting gender equality
- The content of equality action
- The process for implementing equality plans
- The outcome of equality action.

These dimensions were drawn from a previous model, ‘the equality machine’, (Shapiro *et al*, 1995) which was used to describe how gender equality is developed in the workplace and to draw out examples of good practice as well as barriers to equality.

In this research, the original model has been extended to include issues such as organisational culture and organisational change, and has been used to identify and account for the similarities and differences between the case studies.

Having identified key elements that favour or block the development of gender equality, and suggested how and why these might arise, the challenge is to present this information in a meaningful way to practitioners and policy makers to promote further progress. This can be achieved by looking first at each of the above dimensions individually, and then at how they interrelate to produce different equality outcomes.

This chapter therefore presents the dynamic equality tracking model in two stages:

- by identifying the different levels of motivation; content; processes and outcomes of equality action; and

- by noting the interrelationships between these, and the implications for attaining and sustaining equality objectives in the workplace.<sup>8</sup>

## Equality action: motives and influences

The in-depth analysis of the case studies highlighted different factors that influence and motivate companies to undertake equality action. These include *internal factors*, such as conditions in the internal labour market or the organisation's culture and values, and *external factors*, such as the national institutional framework, the competitive business environment or external labour market conditions. Inevitably, these factors are linked not only to national contexts and conditions but also to organisational ones.

Chapter 3 described how several influential factors were found to be common across the case studies, having different effects on equality action. Most importantly, the evidence suggests that there are different *levels* of influences affecting the extent to which equality action is undertaken and sustained. These may be categorised and described as:

- 'initiators'
- 'facilitators'
- 'catalysts'.

### 'Initiators'

This term describes those factors that appear to motivate an organisation to begin to engage in equality action. In the case examples they often included national legal provisions or programmes that provided funding and/or other support. This was particularly marked in the Spanish companies, influenced by the national *Optima* programme; in Italian cases A (retail) and C (white goods manufacture) and in French cases A and B (food manufacture and packaging), which were influenced by equality legislation (see Chapter 3, *National Programmes*). A criticism of these programmes and laws in the Spanish and Italian reports was that the action tends to be limited to a particular group of women and to only part of the organisation, and was often not continued or extended further.

Other factors serving to initiate equality action included collective bargaining, e.g. in Italian case A (retail) and C (white goods manufacture), or German case B (financial services); legal obligations, e.g. Finnish case C (the public service); and labour market shortages, as in Spanish case A (IT). (Further examples are given in Chapter 3.) These influences, however, often did not seem powerful enough to sustain, extend or embed equality action in the organisations.

It would appear that as regards the above factors, more focus is needed on extending and continuing action.

<sup>8</sup> In the interests of brevity only *some* of the research cases are drawn upon to describe and illustrate the model. Sufficient information was also not available in every case.



### **‘Facilitators’**

This describes those factors that influence an organisation to engage in equality action because of a perceived link between such action and wider organisational objectives. For example, in Italian case A (retail), corporate values of ‘personal responsibility, democracy, equality, fairness and solidarity’ combined with the legal and industrial relations framework, a tight labour market and increasing competition in the sector to ensure the company’s interest in developing female employees’ potential through an equality agenda.

The potential strength of this second category of factors would appear to also be their potential weakness. For example, in Italian case A, if the labour market eased and competition became less intense, would the company continue with its equality efforts? While it is difficult to comment on this or other specific cases, the historical evidence illustrates the propensity of companies to undertake equality action in economic boom periods when there are skills shortages, while support for equality may be withdrawn in less buoyant times (Summerfield, 1984; Braybon, 1981; Walby, 1986).

Since ‘facilitators’ appear to be contingent on the current environment, they too are associated with the lack of a long-term perspective and a failure to truly embed equality in the organisation.

### **‘Catalysts’**

This term describes those factors which, while highlighting the alignment between equality and wider organisational goals, also appear to have a longer-term perspective; are less contingent on current environmental conditions; and provide the impetus for equality to become embedded in the organisation’s policy, practices and culture. In French case C (IT), for example, a mixture of corporate values, stiff market competition, the need for flexibility, creativity and innovation (and thus the need for innovative HRM), have all contributed to sustaining motivation for equality and diversity action over the past 10-12 years.

Positive results from equality efforts can sometimes themselves constitute a catalyst for undertaking further equality action, as for example in French case C (IT) and Italian cases B and C (IT and white goods manufacture).

The key characteristics of ‘catalyst’ factors is that they are more dynamic and less affected by present circumstances. Organisations like those mentioned above will build on the equality outcomes achieved, and continually scan their environment to understand how equality remains central to achieving wider organisational objectives, ensuring that it is not an ‘add-on’, but is embedded.

It is difficult to provide a definitive list of the factors affecting equality under each of the above three headings, since many can fit into more than one category. (For example, the competitive business marketplace or labour market conditions might appear under each of them).

What appears to be important, however, is the manner in which a factor is interpreted by the organisation. If the company regards equality as a ‘quick fix’ for a specific problem – but not as

a core organisational issue – it may initiate some action, but equality is unlikely to become embedded and the action may not continue. Equality is more likely to be addressed as a strategic issue when the factors influencing the action fall into the ‘facilitator’ category (i.e. when it is linked to wider organisational objectives), but even here a shorter-term perspective is often adopted, and as conditions change, the commitment to equality may be in danger. Only the dynamic ‘catalyst’-type factors influencing equality action appear to ensure a long-term view, where equality continues to be seen as important to the ongoing development of the organisation and its employees.

This highlights the importance of presenting organisations with a variety of reasons for equality, ensuring not only the fulfilment of legal obligations, but also emphasising the relationship between equality and the long-term effectiveness and competitiveness of the organisation. Organisations must also develop the ability to continually scan their changing environment to understand the role equality can play in sustainable strong performance.

## **The content of equality action**

Chapter 4 described the wide range of initiatives undertaken by the case companies to progress gender equality in the workplace. As regards content, these fell into four areas, namely: recruitment and selection; professional development; the organisation of work and the equality environment.

Another defining aspect of the content is the scope of the action: the extent to which equality action is aimed at a particular group(s) or part(s) of the organisation, on the one hand, or at the whole organisation, on the other; whether it focuses on the four above-mentioned areas individually or combined; and whether it focuses on policy and procedures alone, or also encompasses behaviour and culture. The evidence suggests that the scope of equality action influences the extent to which gender equality is embedded and becomes sustainable in the workplace.

This critical defining aspect of the content of equality action can best be understood by considering it under three headings:

- focused
- scattered
- transversal.

### **Focused**

‘Focused’ is used to describe equality action that has a fairly narrow goal, addressing, for example, a specific target group, such as lower-level women managers; issues such as recruiting more women engineers; or a specific part of the organisation, such as a call centre.

For example, the equality plan in French case B (food manufacture and packaging) focused on the professional development in a three-year training programme of low qualified women workers based in the packaging department.



The biggest disadvantage of ‘focused’ actions is that while they offer benefits for the group and/or area they focus on, often this is where equality begins and ends. It is not extended or embedded further in the organisation.

### **Scattered**

‘Scattered’ describes equality action that is aimed at addressing different issues (such as the reconciliation of work/personal life, recruitment or sexual harassment), and/or targets different organisational areas (e.g. departments) and/or groups (such as women in senior and junior white-collar management positions). Undertaking specific action on different issues in different parts of the organisation can be a way of broadening the impact of equality. It would appear from the case studies, however, that in order to ensure that the multiple initiatives all contribute to achieving equality objectives, do not contradict each other and form a basis for continued action, this approach requires a substantial commitment to equality; continuous monitoring and assessment of results; and an overall equality strategy. Without these, there is a danger that the investment made in the individual areas is not in synergy with the overall progress of equality in the organisation.

Examples of ‘scattered’ content can be seen in the Dutch financial services cases (A and B) and the German financial services case (B), which describe action focused on getting more women into management and or enhancing policies on work/life balance.

### **Transversal**

‘Transversal’ describes equality action that is more likely to take place in more advanced equality-oriented organisations, which adopt a ‘holistic’ approach and embed equality in all their policies, procedures and practices across the four content areas of recruitment and selection, professional development, the organisation of work and the equality environment. Indications of this occurred in only a minority of the case studies. French case C (IT), for example, describes how:

‘equality actions have been focused across several key areas: recruitment, training, career development, work/life balance, cultural change and diversity networks. The positive impact of such a strategy is that it potentially concerns all the women of the organisation and not just particular segments ... it also potentially leads to assessing the impact on equality of all human resources policies and tools: recruitment, evaluation, promotion. training etc. ... the fact that equality actions are spread evenly across several areas appears to have a positive impact on cultural change for the organisation as a whole.’

As will be discussed more fully later in this chapter, the process for implementing equality action appears to be critical to the success of the transversal approach. Unless the strategic importance of equality and the need to sustain equality action is highlighted, there is a danger that transversal action may become lost or taken for granted and that new segregation or new inequities may arise.

## The process for implementing equality action

Many of the national research reports commented on the importance of a specific process to successfully implement equality plans. For example, in UK case C:

‘Part of the success of HR policies and practices can be attributed to the fact that a clear and systematic methodology for their implementation was followed.’

Efforts aimed at gender equality in the workplace are a major undertaking for an organisation. Equality action demands changes in policy, practice, behaviour, culture and values. Like any other change-management programme, it requires a well-planned, comprehensive approach – yet the research suggests that this is frequently missing.

Where a change-management process was detected in the case studies, detailed analysis suggests that simply ‘ticking a box’ to indicate that certain steps have been followed appears to be insufficient to ensure positive results. What matters is the approach that is taken to each element of the change process. For example, mainstreaming may be approached positively or negatively; social partnership may be limited or ongoing; monitoring/assessment may be used to terminate a project or to identify further needs or action.<sup>9</sup>

Three approaches to implementing equality plans can be identified in the case studies, described here as:

- the ‘one-shot’ approach;
- the ‘building-blocks’ approach; and
- the continuous approach.

They represent three levels, the last of which has the most potential to ensure that equality becomes embedded in the organisation and can be sustained over time.

### The ‘one-shot’ approach

The term ‘one-shot’ describes the approach adopted by those organisations which followed quite a detailed and methodical process for developing gender equality, but applied it only to a particular project and/or a particular part of the organisation, e.g. to the issue of work/life balance or the professional development of poorly skilled women. This does not mean that the process was poor – on the contrary, it was often well structured. The focus, however, was short term: there was no attempt to spread the impact of the equality action throughout the organisation or to use the results as a basis for continued and/or broader equality activity.

For example, in French case B (food manufacture and packaging), a comprehensive process was adopted for implementing an equality plan aimed at assisting poorly skilled women in the

<sup>9</sup> A more detailed description of positive and negative approaches to these issues can be found in the concluding chapter.



packaging department to adapt and to qualify them for jobs traditionally held by men. While some positive results were achieved, the goals, content, process and outcome of the plan were always limited and very focused on a single group in a particular department. Equality action was identified as needed in this area, but no attention was given to other groups of women, such as poorly skilled white-collar workers. Indeed, there was no point at which the process of implementation attempted to relate the plan to any other area of the organisation.

Thus, while the ‘one-shot’ approach may be comprehensive, its key limitation is that it makes little or no attempt to ensure that equality action is continued or extended as and where necessary.

### **The ‘building blocks’ approach**

In contrast to the previous approach, a process can be adopted for implementing equality plans that has a medium-term outlook, by seeking to ensure that the action taken has a wider impact on the organisation, providing building blocks for continued efforts towards equality goals. The case studies show that this occurs when the outcome of equality activity is monitored, actions are consolidated and incremental improvements are continuously made. In short, the process lays down the building blocks for the improved recruitment, retention and development of women in the longer term.

Dutch case A (financial services) illustrates how this can help ensure that equality initiatives which may be categorised as ‘scattered’ are pulled together to form a more strategic, planned equality process, achieved in this case through the company’s M/F (male/female) programme.

The M/F programme has two major aims: to change the organisational culture and increase the number of women in higher-level positions. This is being achieved by several means, including:

- The introduction of flexible working hours.
- Financial contributions for childcare arrangements.
- Recruitment and selection.
- Internal communication.
- Women’s networks.

Through a coordinated implementation process that involves the board of directors, trade union representatives, managers and women as actors in the process, the Dutch company is able to ensure that its varied actions continue to support overall equality goals. This is supported further by its participation in the *Opportunity in Business* programme, which provides guidance and enables the company to assess and compare its progress against that of other companies in relation to a defined set of key variables.

Without a process such as this, there is a danger that positive outcomes are not consolidated and fail to form a basis for continued action, and that progress with equality may again stagnate or begin to crumble.

### The continuous approach

The continuous approach is characterised by a long-term perspective, where the organisation has embedded equality in its policies, procedures, practices and culture – and where it also engages in focused action when and where necessary. Results are regularly monitored, not just for legal and ethical reasons, but because the organisation acknowledges the centrality of equality to the achievement of its strategic goals. This monitoring is continuously built on to identify required future change and action.

Like ‘transversal’ equality action (examined above), the continuous approach to equality plans was not commonly found in the case studies. However, Italian case C (white goods manufacture) and French case C (IT) are examples displaying the characteristics of both transversal content and a continuous approach. In the Italian company, the national committee on equal opportunities appears to be the key:

‘The committee is responsible for promoting women’s professional and personal development through training and organisational measures, identifying and eliminating forms of discrimination, propagating an equal opportunities culture and taking action to ensure proper responsibility for dignity. It has 12 members, six appointed by the union side and six appointed by the company.’

This organisation has been forming equality plans and undertaking action since the early 1990s. A diagnosis is made of the characteristics and needs of women in all areas and at all levels in the organisation. Subsequent initiatives are directed both specifically at women *and* at changing behaviour and culture throughout the organisation, as well as at modifying existing policies and procedures and creating new ones to support equality objectives, such as flexible working. Thus, the activity spans all of the four content areas of equality action: recruitment and selection, professional development, the organisation of work and the equality environment.

The ongoing strategic importance of gender equality is ensured by the fact that the implementation of the equality plan is interwoven with policies on organisational change and innovation in human resource management being pursued by the company. The implementation process includes several key features that define it as continuous, including:

- Situating equality at a strategic level in the organisation.
- Active and continuous trade union involvement.
- Communication and awareness-raising to influence the organisational culture of management and unions.
- Regular analysis of the organisational context and its relation to achieving equality objectives.
- Identification of a ‘map’ of inequalities and forms of discrimination.
- Regular evaluation of action and overall progress.

The Italian national report comments:

‘Some 10 years on from the launch of the first initiatives, it can be said that the changes introduced have had an impact which has gone beyond ... the specific targets at which the

individual actions were directed; ... which has spread throughout the company and would be difficult to reverse.'

It should be noted that while equality now appears to be embedded in this company's policies and practices, it also recognises the periodic need for specific 'focused' action.

This organisation seems likely to achieve ongoing equality results, thanks to its strategic, coordinated approach, with a focus on continuously identifying the needs of women and root causes of any inequalities; the monitoring of results; and the clear communication of the importance of equality for achieving overall organisational goals.

### **The outcome of equality action**

This chapter has suggested that there are three levels of (a) factors influencing equality action (b) types ('content') of equality action; and (c) processes for implementing equality plans, which progressively produce wider and more long-term results in an organisation. It is also possible to identify three levels of *outcome* of equality action in the case studies:

- limited;
- 'leopard spots'; and
- across the board.

#### **Limited**

A limited outcome refers to equality results that are specific to the group of women or issue targeted by the action. It tends to result from focused action undertaken with a 'one-shot' approach. Limited outcomes should not be dismissed as they undoubtedly entail benefits – normally for a specific group of women. For example, in French case B (food manufacture and packaging) 12 of the women trained through the equality plan now have higher qualifications and pay, and most of the remainder now do a job that includes more supervision, responsibility and pay. The women are also more autonomous in their work. There has been little if any development of equality, however, in the culture, policies and practices of the wider organisation, and other groups of women have not benefited.

#### **'Leopard spots'**

In some of the case companies there was an acknowledgement that equality needed to become embedded in the organisation. Consequently, moves were made to undertake action in different parts of the organisation and on different issues. The outcome could be compared to leopard spots: islands of equality across the organisation.

Results in the Dutch and German financial services companies (which were described earlier as taking a 'scattered' approach as regards the content of the equality action engaged in) could be described as falling into this category. In German case B, policies aimed at reconciling work and family/social life have resulted in about 80% of women returning after parental leave (which is often short). Greater transparency in the recruitment and selection process at management level

has also been achieved, improving equality of opportunity for women in this area, previously dominated by male networks. The Dutch cases have also achieved an increase in the number of women in middle and senior management, and a growth in women's networks.

The obvious limitation of such results, however, is that while islands of equality are created, islands of inequality remain, such as job segregation, unequal pay or cultures that do not support gender equality. To attain and sustain a comprehensive equality organisation, good results are required across the board.

### **Across the board**

Although there were few examples in the research of organisations falling into this outcome category, it is important to indicate the kind of results we might expect to see in an organisation that is highly developed as regards equality. Here, an across-the-board outcome is likely to be the result of equality action that includes both broadly focused and more specific initiatives and targets. For example, if action is required to upgrade the skills of a particular group of women and/or men, it will be undertaken, while at the same time, equality is embedded in all organisational policies, procedures and practices as well as in the cultures and values of the company.

The two case companies that came closest to exhibiting this type of outcome were French case C (IT) and Italian case C (white goods manufacture). Significantly, the content of the action undertaken in both these cases falls into the 'transversal' category, while the implementation approach adopted was the 'continuous' one.

In the French company, improvements were noted, for example, in:

- The number of women applications and recruits.
- The number of women promoted from the post of technician to supervisor.
- The number of women promoted from supervisor to manager.
- The number of women participating in leadership development training.
- Agreements and policies in place to facilitate a better balance of work and personal life.
- The setting up of women managers' networks.
- Evidence of diversity being integrated into the entire corporate culture.

There is now a growing emphasis on the importance of further developing a diversity culture. Also, the importance of equality and diversity to the future success of the company is clearly communicated to all staff and managers.

In Italian case C, results include:

- An overall increase in female employment.
- An increase in the promotion of white-collar women (including management roles).
- An increase in the number of women employed in non-traditional areas such as R&D and process engineering.



- Evidence of organisational culture changing to promote equality as a part of ‘normal practice’.
- A strengthened system of participation.

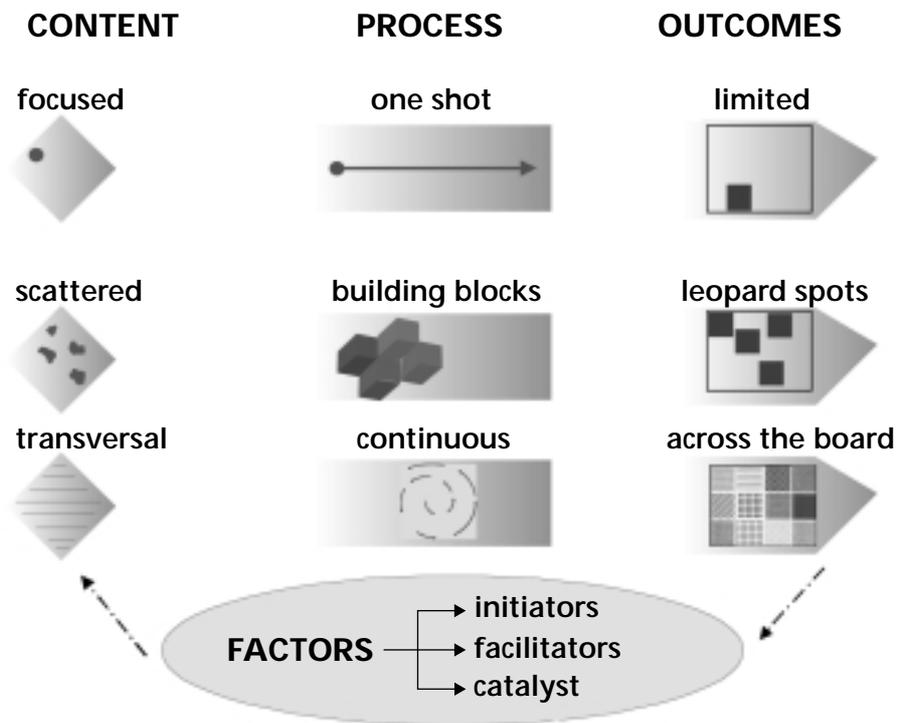
While both these companies have clearly made good progress in terms of overall female employment, the number of women working in non-traditional areas and ensuring that equality is regarded as a core organisational issue, they also have more work to do in achieving their equality objectives. It does appear, however, that the values, culture, policies, procedures and processes are in place to ensure that equality is sustained and advanced in the future.

### Piecing the model together

So far this chapter has presented the different levels within the individual dimensions of the model. To turn this into a dynamic model that may be of practical use, helping equality practitioners and policy makers to understand how equality can be further developed in the workplace, and why progress may be blocked, we need to see how these dimensions and levels relate to one another.

Figure 1 below illustrates the model’s hypothesis that there is a relationship between the content of equality plans, the implementation process adopted and the final outcome or results achieved. These three dimensions of equality action are affected by the different factors (categorised as ‘initiators’, ‘facilitators’ and ‘catalysts’) that influence an organisation to engage in such action; factors which may in turn be affected by the outcome, with the results achieved themselves becoming facilitators or catalysts for further action.

Figure 1 The dynamic equality tracking model



The model should be read both vertically and horizontally. When read vertically, three levels can be identified within each of the three dimensions of content, process and outcome. When read horizontally, it becomes possible to track the development of an organisation’s approach to equality at different stages.

At the lowest level across each of the dimensions (focused, ‘one-shot’, limited equality action), organisational approach to equality is short-term and limited in scope. From this level, however, the potential exists for equality to either develop to higher levels, remain a marginal issue or disappear altogether from the organisation’s agenda.

At the highest level in the model (transversal, continuous, across-the-board equality action) the organisational approach is broader in its focus and impact, more embedded in overall policies, procedures, practices and culture, and takes a longer-term perspective.

By identifying which level of equality activity exists within an organisation in terms of each of the four dimensions, it is possible to track its overall direction as regards equality. That is, whether it appears to be improving or is encountering problems, as demonstrated in Figure 2.

Figure 2 Tracking the direction of equality

**Improvement**

Content	Process	Outcome
Focused	‘one-shot’	limited
Scattered	‘building blocks’	‘leopard spots’
Transversal	continuous	across the board

**Encountering problems**

Content	Process	Outcome
Focused	‘one-shot’	limited
Scattered	‘building blocks’	‘leopard spots’
Transversal	continuous	across the board

**Applying the model to the case studies**

How the model is interpreted is not necessarily straightforward. For example, we would suggest that an organisation motivated to pursue gender equality by factors that fall into the ‘initiator’ category is more likely to adopt a measure(s) which is ‘focused’ (Level 1) or at best ‘scattered’ (Level) 2 in terms of its content. It therefore achieves only limited (Level 1) or at best ‘leopard spots’ (Level 2) results, depending on the process followed. That is, this starting point is less likely to achieve long-term, across-the-board (Level 3) results.

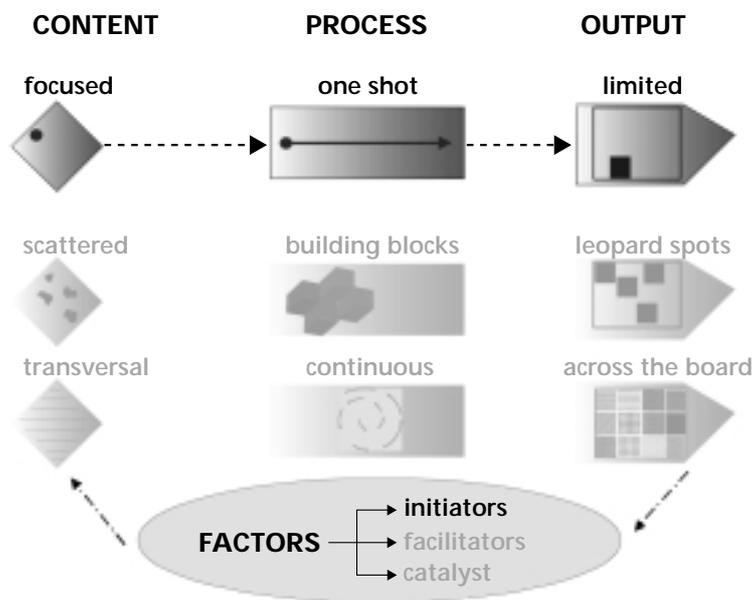


Similarly, we would suggest that while a company might be motivated by ‘catalyst’ factors and might undertake ‘scattered’ (Level 2) or even ‘transversal’ action as regards content, if it does not follow a Level 3 continuous implementation process, the outcome may fall short of expectations and be of the ‘leopard spots’ type (Level 2) rather than across the board (Level 3).

It is possible in some of the case studies to identify a one-level linear relationship between the four dimensions (Figure 3). This tends to occur where the equality action is described as having quite a clear beginning and end, such as in French case B (food manufacture and packaging). In this company, ‘initiator’ factors were the main motivation for equality action, among them the legal framework and a union agreement. Additional factors were a competitive external market and the need to manage the workforce. While the latter fall into the ‘facilitator’ category of factors influencing equality action, as we follow this case study through, it is clear that the focus on equality was more short term than long term.

As regards content, the action took the form of training for poorly qualified women based in the packaging department. The process involved, while comprehensive, can be labelled ‘one-shot’, since the results – positive though they were – were limited to a single group/area of the company only and did not spread beyond this.

Figure 3 The model applied to French case B



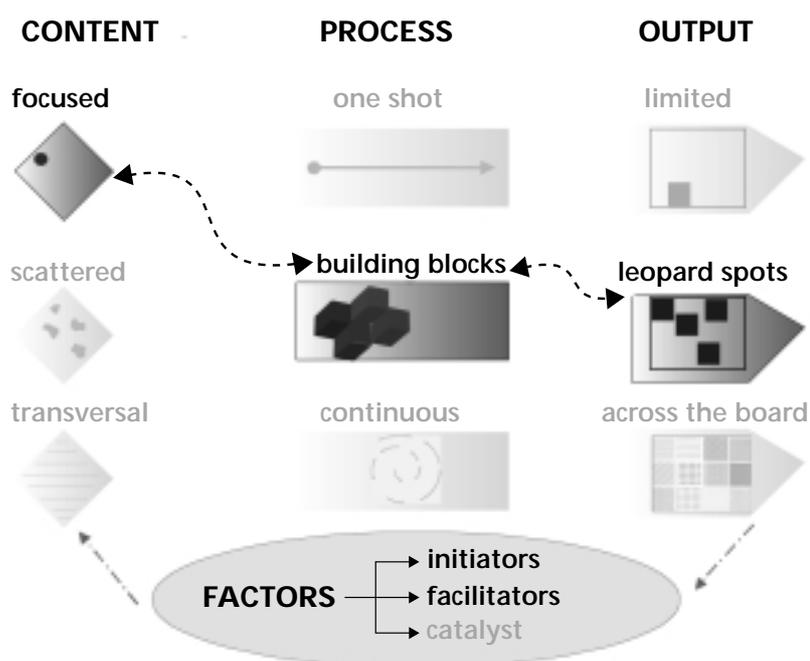
It is too simplistic, however, to suggest that all the case studies show this one-level, linear, horizontal pathway. The process is inevitably more complex and dynamic in those cases where equality action constitutes an ongoing process of change.

Some of the cases illustrate that while the content, for example, may be ‘focused’ (Level 1), an implementation process that falls into the ‘building blocks’ category (Level 2) may lead to a

‘leopard spots’ (Level 2) type of outcome. This more complex pattern is demonstrated in Italian case A (retail).

In this company, the equality activity was limited mainly to a mentoring experiment in support of the professional development of a particular group of women.<sup>10</sup> One important outcome, however, was the establishment of an equal opportunities fund (to be administered by the equal opportunities committee) to extend and expand equality action. This occurred because the process for the first initiative had included a company-wide analysis of the causes underlying the under-utilisation of women in the company, as well as an assessment of the results of the initial action. Information on this was disseminated both within and outside the organisation, and the results were presented to the board of directors. The fact that the factors influencing the initial action were of both the ‘initiator’ and ‘facilitator’ type was instrumental in the equality action continuing. This example shows that a Level 2 (‘building blocks’) implementation process has the potential to carry Level 1 focused action to another level, encouraging further and more intense equality action (Figure 4).

Figure 4 The model applied to Italian case A (retail)



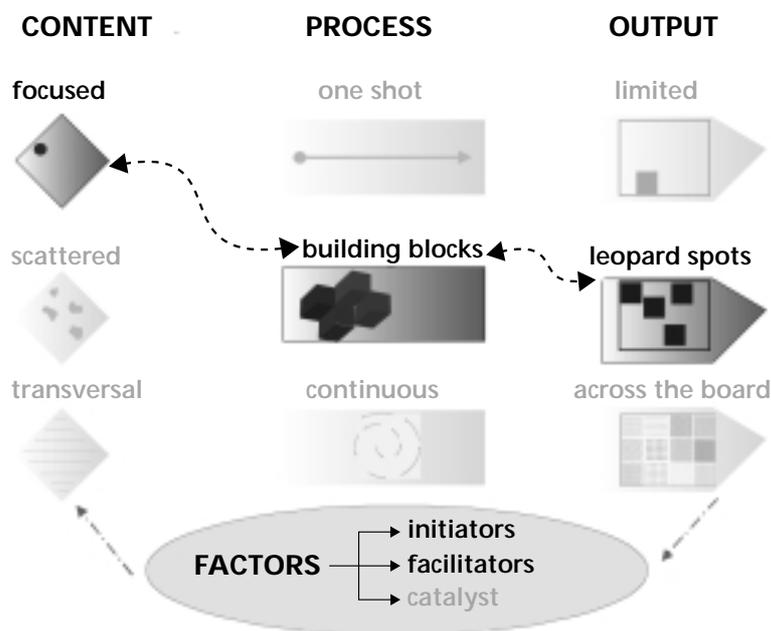
Another, example, UK case B (public service) shows that the dynamics of equality action may become problematic over time instead of developing further because of the factors influencing the action and the adoption of a different implementation process.

In this case, the institutional framework was what initially prompted the equality action. In the mid 1980s, the organisation established a *Corporate Equalities Team* in the chief executive’s

<sup>10</sup> A maternity/paternity service in the Personnel Department was also included.

department. Its equality activities were mainly concentrated on recruitment and selection, along with some professional development for women staff. Its major initiative was the development of the STEPS model (*Strategic Equality Plans in Service Delivery*), which was designed to assist different departments in reviewing their services to the public from an equalities perspective. Thus, action was scattered across the organisation. The Equality Steering Group, made up of first and second-tier officers, led by the Chief Executive, supported all the action at this time. This group met regularly, set action plans and objectives and received progress reports from departments. The implementation approach at this point could be identified as falling into the ‘building blocks’ category. (Figure 5)

Figure 5 The model applied to the first stage of action in UK case B



In 1996, however, the Equality Steering Group was disbanded due to budget cuts and the belief that equality had now been mainstreamed in the organisation. The report notes that:

‘there was no longer an infrastructure for enforcing or monitoring units or actions or for committing resources to them.’

Political commitment in the public service is now switching to a new equality priority – race – and it is as yet unclear what the impact will be on gender equality. The implementation process seems to be moving away from a ‘building blocks’ approach to one where individual departments take responsibility for action, with no overall strategy or coordination. Equality action continues to yield results across the public service but these are patchy (‘leopard spots’), and:

‘at corporate level there is no monitoring and therefore no communication of results and no new waves of analysis.’

The current picture appears to be one of ‘scattered’ action across different issues and organisational areas, a fragmentation which may result in a situation where some organisational areas are ‘more equal than others’, ultimately undermining equality efforts. (Figure 6)

Figure 6 The model applied to the second stage of action in UK case B

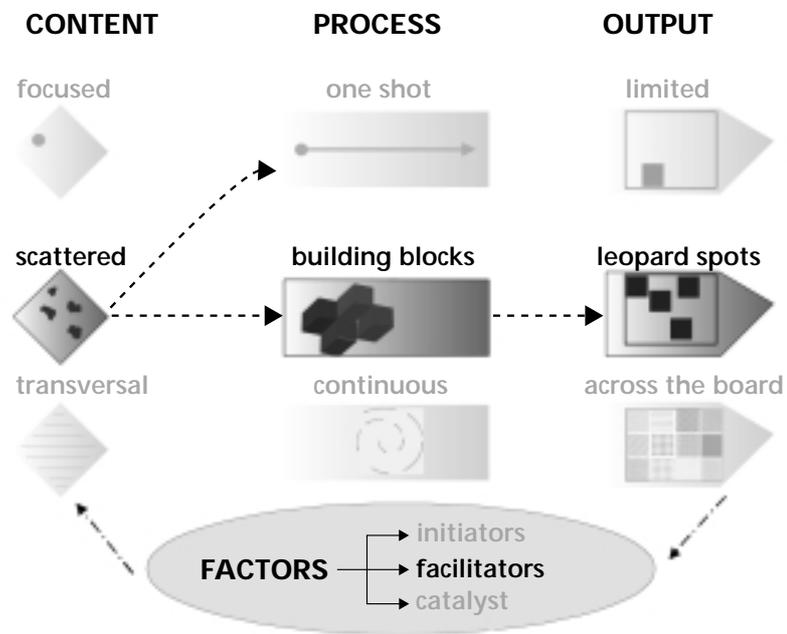
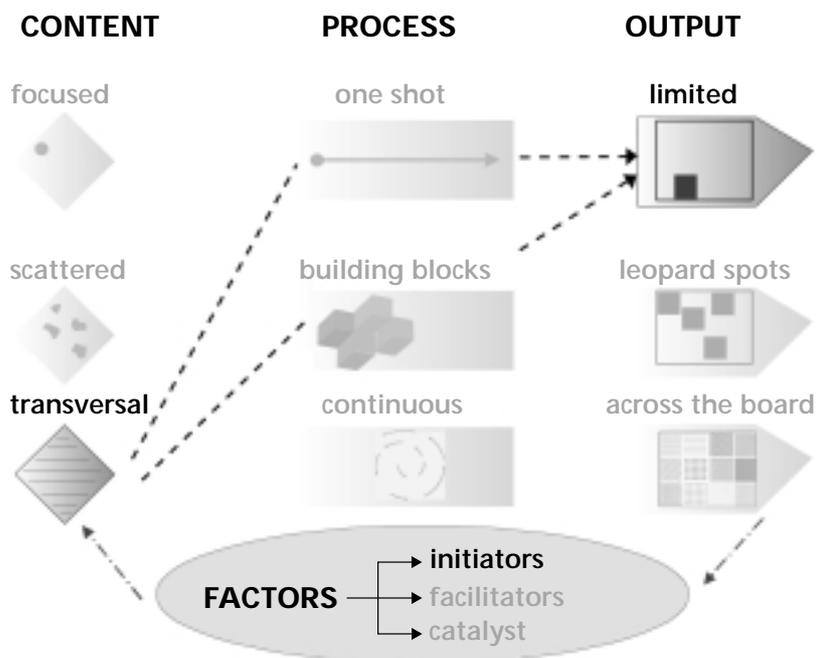


Figure 7 The model applied to Finnish case A (manufacturing)





The dynamic equality tracking model can also be used to shed light, in Finnish case A (manufacturing), on why ‘transversal’ or Level 3 equality action (as regards content) does not seem to produce ‘across-the-board’ Level 3 results (Figure 7). Instead, ‘limited’ (Level 1) results were achieved on specific issues. Here, a certain workplace culture and even the views of women themselves appear to be working to sustain gender segregation as regards particular tasks, despite some efforts on the part of the company to overcome the problem.

The factors behind the equality action – mainly the legal obligation to draw up equality plans – fall into the ‘initiator’ category, and there is little reference to any other internal or external motivating factor. The ‘transversal’ content is not supported by a ‘continuous’ approach to implementation. The challenge here is therefore to identify an implementation process and specific measures to address the barriers referred to above, which are standing in the way of a better result.

### **How the model can be used**

These examples from the case studies show how the model can help track the overall progress (or otherwise) of equality, highlighting potential choices for achieving further progress, or the underlying reasons for its lack. It should, of course, be subjected to further testing. We suggest, however, that when used in conjunction with a more detailed diagnostic model – such as the one used to conduct the in-depth analysis of the four equality dimensions in the case studies – this dynamic tracking model can help equality practitioners and researchers to identify:

- why an organisation is at a particular stage in developing equality in the workplace;
- the choices and challenges to be faced in developing equality further and sustaining it over time;
- why the development of equality may be blocked.

This information can also be used by policy makers to track the impact of equality policies in practice at organisational level. This can help to identify the tools and methods that may be required to assist in bridging gaps between policy and practice.



Chapter 8

Conclusions

The conclusions to this report address the key question: how can gender equality in the workplace be achieved and sustained over time? The research has highlighted the catalysts for and influences on equality action, and has shown what it is that allows or blocks a successful equality outcome. It has resulted in the identification of a number of critical elements with implications for equality practitioners and policy makers.

These elements and their implications, particularly for companies, are discussed in this chapter. First, however, some key points on the wider issue of equality action as a change process should be noted.

### **Change management and gender equality**

As shown throughout this report, the process of establishing gender equality in the workplace implies complex change that is affected by various internal and external factors, representing both opportunities and constraints. Different strategic options are available to foster and bring about equality, for example, an incremental approach, where existing practices are improved, or a more radical approach requiring change on a broader scale.

It might appear too obvious to state that such complex change needs to be supported by a detailed and carefully planned change management process – whatever strategic approach is adopted – but this was clearly missing in several of the case studies. This report concludes that unless the drive for gender equality is supported by a comprehensive process of change management, then at best, ‘islands’ of equality may be achieved, leaving other patches of inequality and areas where *sustained* equality cannot be guaranteed.

Approaches to managing change have been documented widely, and it is clear that the change process appropriate to developing gender equality has many features in common with other types

of organisational change. While it is not the purpose of this report to review the various documented approaches in depth, they all tend to point to the importance of sponsorship and ownership (meaning responsibility) of change; the need to identify objectives and constraints; the importance of culture and behaviour; and the need to design initiatives appropriate to integrating change into day-to-day activities.

Several models for managing change to develop gender equality in the workplace have also been put forward in the literature. Some of these have been provided by national gender equality programmes and/or legislation, such as those found in France, Italy, Germany (*Total E-Quality*), Spain (*Optima*), the Netherlands (*Opportunity In Business*) and the UK (*Opportunity Now*). A criticism of some of these in the national reports, however, is that they can be limited in their ability to embed equality in the whole organisation and to sustain it over time. They often lead instead to an improvement in one area only, or affecting a particular group, but do not develop the organisational capability to transfer learning to other areas.

The present research is concerned with equality in the whole organisation, and not just in parts. This report suggests that in some cases, either the recommended approach to equality omits key elements of the change equation, or organisational practitioners fail to include them in practice or do not put them in place effectively. The elements identified by the research include:

- Monitoring (important for organisational learning).
- Embedding equality in an innovative HRM approach so that all activities and areas of the organisation are covered.
- Addressing organisational culture and behaviour.
- Through social partnership, involving all the actors in the organisation.
- Embedding equality in other organisational change strategies.

This report concludes that unless these critical elements are included, there is significant danger that equality may remain marginal in the organisation, and that results may be limited and/or unsustainable in the longer term.

## **The critical elements**

### **Monitoring**

The research suggests that an approach to monitoring/assessment that is best described by linking it to the term, ‘the learning organisation’, greatly influences whether the results of equality action can be built on and spread throughout an organisation.

The term is used to draw together the concepts referred to in the literature on this broad area. It is used here to refer to a monitoring process whose purpose is to facilitate organisational learning: an approach intended to highlight what is going well or not so well in achieving gender equality objectives. It includes the notion that assessment of what needs to happen and/or change next will result in an action plan for continued efforts towards those objectives. Formal as well as

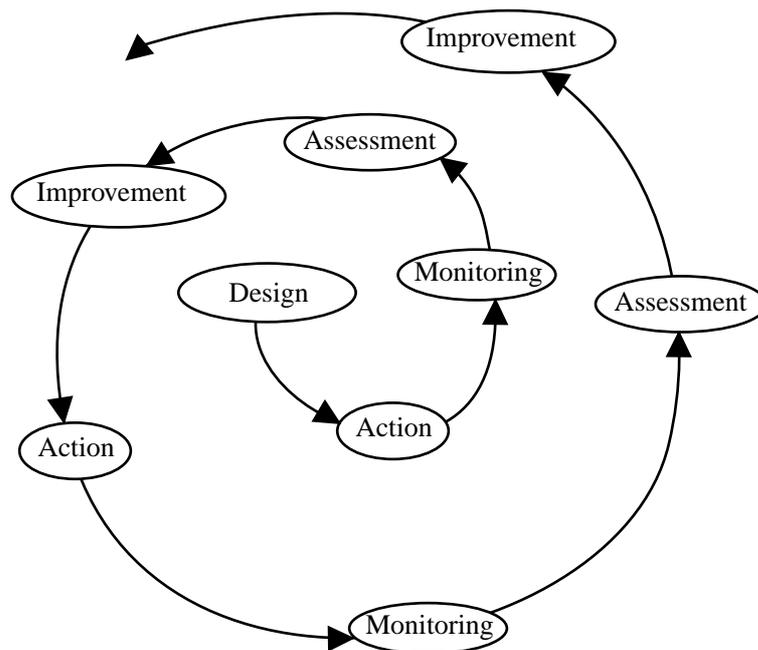


informal or cultural/behavioural change may be involved. There is also the acknowledgement that responsibility for equality change does not lie with women alone – as has often been the case with equality programmes in the past – but that the organisation must change to create an environment that enables women to reach their full potential.

The case studies indicate that often, monitoring does not take place at all. Evidence of it is more commonly associated with focused action, but even where it does occur, often no learning is drawn from it, i.e. the experience is not built upon to make further plans and take further action. Even where equality monitoring is more widespread throughout the organisation, it can still often be patchy in that some but not all aspects of equality are covered.

The importance of monitoring is not particular to the field of equality. It has been stressed in wider literature on organisational innovation and improvement, as Figure 8 illustrates (Pero and Campagna, 1995).

Figure 8 Spiral of improvement



What is clear from this research is that equality action and goals without monitoring can at worst deteriorate into an exercise in ‘ticking the box’, and at best result in a static situation. Taking the ‘learning organisation’ approach to monitoring is crucial to achieving real, sustainable equality.

**Innovative human resource management**

The research has shown that an innovative approach to HRM can provide a strong basis on which to build equality. Without this critical element, the foundations can begin to crumble and undermine equality efforts.

What is meant by innovative HRM? It has been argued that a modern approach should be strategic in its focus and should therefore be closely linked to the strategic direction of the organisation (Pfeffer, 1998). Such an approach sees employees as central to the achievement of strategic objectives. HRM policies and procedures are developed in line with this view, and will support the development of employees throughout their journey in the organisation. The case studies illustrate the development of specific HRM procedures and practices that may be described as innovative and that complement the modernisation of organisations. Examples include:

- Greater transparency, achieved through such practices as 360° assessment and open promotion procedures.
- Employee empowerment.
- A change in leadership profiles, from 'command and control' to enabling and facilitating.
- A change in career models.
- Mentoring programmes.
- Self-managed development.
- The valuing of 'soft' as well as hard skills.
- Recognising and seeking to meet the needs and aspirations of different groups of employees.

Some of the case studies show that greater transparency in promotion processes and communication benefits women, who may not have had access to informal internal networks. In the absence of formal transparency, it is often through these informal networks that key information on promotions and on the organisation itself are exchanged. Similarly, mentoring programmes have been shown to benefit women, by giving them access to more senior staff and to networks previously unavailable to them.

Such examples of innovative HRM measures were already identified in the past as helping to promote gender equality in the workplace, but they may have been undertaken as an 'equality project' in one part of the organisation only, or for a limited period of time. In this research, a minority of the cases do provide examples of innovative HRM being implemented across the whole organisation, and not as a specific equality action. In theory, this has the potential to yield greater benefits for a larger number of women, and it is important that we begin to track the impact on the continued development of gender equality in the workplace.

Innovative HRM may also help to ensure that equality action takes place across the four key areas identified in this research, namely:

- Recruitment and selection.
- Professional development.
- The organisation of work.
- The equality environment.

Combined, these areas cover every aspect of life in the workplace, including issues of organisational behaviour and culture. Some of the cases have shown that the danger of failing to address

*all* of them is that the area(s) left untouched may undermine the progress made elsewhere. For example, action undertaken to recruit women to non-traditional jobs could be undermined by the working environment and the behaviour of existing staff in that occupational area, making women reluctant to enter it or causing newly recruited women to either leave or limit their progression once inside. Similarly, improved levels of recruitment to higher positions for a limited number of women may be counterweighed by divisions of labour on the basis of gender elsewhere in the same company, maintaining gender stereotypes.

Because organisations are complex, and action or inaction in one area inevitably affects another, it is important to take a comprehensive approach to equality. As the cases illustrate, such an approach seems rare in the early stages of the equality process. Often, one area only is addressed, and while it can lead to positive results, these are limited in their impact and scope. In order for real change to be attained and sustained, action must be undertaken in all four of the above-mentioned areas.

### **Organisational culture and behaviour**

Creating cultural change to support gender equality is a complex issue, influenced by factors both within and outside the organisation. In considering equality strategies, it is important to emphasise that an organisation is far from being an independent, autonomous entity, immune to changes that take place in the wider environment.

Organisational theory has for decades stressed the role and influence of the wider environment – as well as the behaviour of its members – in the management and overall performance of companies (Burns and Stalker, 1961; Mintzberg, 1979; Kanter, 1983). While largely ignoring the gender aspects of the organisation and the environment (Burrell and Hearn, 1989; Cassell and Walsh, 1993), such theories clearly establish the difficulty of manipulating or changing an organisation while disregarding its environmental influences. Approaches to workplace equality that ignore the wider social, political and economic environment cannot take account of the stereotyped gender roles that exist in society and that are reflected in the organisation, which, in turn, contributes to the maintenance of the gender structure. This emphasises the importance of addressing issues such as organisational behaviour, beliefs, values and culture, as well as procedures and practices that leave much underlying informal discrimination and inequality intact.

We have seen in Chapter 3 how a supportive cultural environment and system of values can promote gender equality. Analysis of the outcome of equality action also showed how activities such as training, communication, the drawing up of ‘value statements’, partnership and consultation can lead to positive cultural change that creates greater awareness, understanding and support for gender equality in the workplace. This reinforces the argument that assumptions and beliefs are *learned* (Hofstede, 1991), and emphasises the importance of planned equality action that can help change assumptions and beliefs, for example, about the skills, value and role of women in the workplace. Many of the case studies highlight the need for deliberate action to bring about the cultural change that underpins equality. They illustrate in particular the continued

existence of ‘islands’ of workplace culture reacting against gender equality and/or undermining equality efforts, contributing, for example, to the persistence of the ‘glass ceiling’ that was evident in most of the cases, above which women do not appear to progress.

### **Using social partnership to involve all the actors**

The key form of social partnership mentioned in the case studies was collective bargaining, cited as important to achieving equality outcomes in five of the seven countries. In both Spain and the UK, this is described as being very decentralised: ‘notable for its lack of content’ in Spain; while in the UK, ‘both equality issues and specific “women’s” issues are still very poorly served’ by collective bargaining. It is also less important to the equality process in companies with US parents, such as case C in France (IT) and case B in Italy (IT), where, despite some trade union involvement, the equality process is very much management and company led.

What is interesting is that in the remaining countries, collective agreements tend to concentrate on the traditional female issues of flexibility and childcare, particularly in the Dutch and German cases. Equal pay is also an issue. The Finnish report highlights the link between a successful outcome to negotiations and the presence of female negotiators. It also points out that often, women are involved only in the preparations for such negotiations, rather than participating as actual negotiators.

In most of the countries and companies studied, collective bargaining nonetheless appears to be a key element in the process of achieving equality results, and in some cases, it is crucial to ensuring that equality issues are included on the company agenda and action initiated.

However, employee rights and benefits achieved through collective bargaining are clearly only part of the equality picture. Gender equality in the workplace is also concerned with actual practice, professional development and the environment, including behaviour and culture. Social partnership could play an important role in addressing these issues, but evidence of this is absent in the majority of the case studies, and at present, such action often appears to be instigated and led by the company management side.

Real equality requires the involvement of men and women employees, and good communication and consultation with both. There were some examples in the case studies to demonstrate that fostering and implementing equality action in the workplace can assist in the maintenance of social partnership.

There is a strong argument for trade unions and works councils to re-evaluate their role in the equality process and to extend it beyond collective bargaining to include development and implementation. There is also a need, however, to establish through further research the impact this might have on gender equality.

### **Embedding equality in organisational change**

While this report stresses the importance of adopting a managed approach to change as a means of progressing gender equality in the workplace, it must be noted that wider organisational

change is also relevant. Restructuring, changes in skills needs and/or working time and so on, can all have a potentially positive or negative impact on employees generally and on gender equality specifically. (European Work and Technology Consortium, 1998; Webster, 1999.)

Indeed, the European Work and Technology Consortium (1998) refers to different approaches to organisational change in terms of the 'high road' and 'low road' of innovation. A 'low road' company strategy would include responding to a changing market environment with policies on workplace flexibility that are primarily motivated by a desire to cut costs. This inevitably decreases demand for labour, and it is also likely to reduce the quality of working life for employees (job enlargement without job enrichment). The 'high road' approach is where organisations employ flexibility strategies that are geared to the creation of new products and services, exploring new business activities and developing new markets. This approach – defined by characteristics that include 'the creation of organisational spaces and the liberation of human creativity in ways which achieve a dynamic balance between product and process innovation' – can have the opposite effect on employees to the one mentioned above.

The case studies show that different approaches to organisational change can have different impacts on women and men and on the gender equality agenda. On the positive side, there are some examples of current organisational change appearing to support equality: the increased value being placed on 'softer' skills and the move to multiskilling, which are referred to in some cases as underpinning the promotion of women's professional development and helping to overcome male/female job segregation.

Issues of working time, on the other hand, show how tensions can arise between equality and wider organisational change. Two distinct sides of flexibility are seen in the research. On the one hand, there is a move among companies – often included on the equality agenda – to try and improve the balance between work and home life for both women and men. Given the wider European interest in such 'reconciliation', this could be viewed in a positive light. In several of the case studies, however, it was noted that efforts in this area arose mainly from a desire to retain women after maternity leave, thus avoiding the loss of knowledge and skills and the cost of recruiting/training new staff.

While recognising employees' need for greater flexibility, some of the companies are themselves experiencing a greater need for staff to be flexible. This was particularly evident in those engaged in retailing and financial services, where there is pressure to extend opening times and customer service hours. Tensions often occur in workplace environments like these where in practice it is either extremely difficult or culturally unacceptable for employees to reap the benefits of flexibility policies, which can sometimes even result in longer or more unsociable hours for both women and men.

Previous research undertaken by the authors (Valbjorn *et al*, 1998) confirms that the debate on reconciling work and personal life has remained quite separate from the wider discussion of flexibility and innovation as a response to the need to increase competitiveness and be adaptable.

It also showed that the barriers to achieving ‘work/life balance’ and wider organisational flexibility are often the same, e.g. an unsupportive culture and lack of management skills.

The case studies also show that organisational change in workplaces that lack an overall equality commitment can benefit one group of women while impacting negatively on others. For example, in German case B and Dutch case A (both in financial services) the increased participation of well-educated women in the labour market combined with company policy on recruiting and retaining managerial resources in response to global market challenges to favour an increase in women managers, while poorly educated/skilled women in traditional jobs were seen as ‘naturally’ redundant.

While the cases illustrate some positive links between organisational change and gender equality, the overall impression is that at strategic level, the two are considered separately. This has serious consequences. Firstly, some of the cases show that equality action is often suspended or even terminated during periods of organisational change. Secondly, change is frequently planned and implemented without its equality implications being considered. This can have a fortuitous positive effect or a benign impact on equality, or it may be negative. The point to stress here is that equality is rarely if ever considered, and if it is ever to be sustained in the long term there is an urgent need for it to be treated as a strategic rather than a marginal issue. Equality must be explicitly considered when designing, planning, implementing and reviewing any aspect of organisational change.

## **Mainstreaming**

In analysing the process for implementing gender equality action, this report has emphasised the relationship found in the case studies between gender equality, HRM and core organisational strategy. The cases showed the importance of HRM in ensuring both that the appropriate policies and procedures are in place to support gender equality goals, and that gender equality is linked to core organisational strategy. The latter was rarely found in the cases, but emerged as critical to ensuring that gender equality remain on the corporate agenda during periods of change.

The European definition of mainstreaming emphasises the need to embed gender equality in all policies. The European Commission’s Communication on mainstreaming of 1992 states that:

‘Gender mainstreaming involves not restricting efforts to promote equality to the implementation of specific measures to help women, but mobilising all general policies and measures specifically for the purpose of achieving equality by actively and openly taking into account at the planning stage their possible effects on the respective situation of men and women (having therefore a gender perspective). This means systematically examining measures and policies and taking into account such possible effects when defining and implementing them.’



It specifies that:

‘The promotion of equality must not be confused with the simple objective of balancing the statistics: it is a question of promoting long-lasting changes in (various areas of life and whole society so to ensure) demography and pluralism.’ (European Commission, 1996c)

Systematic consideration of the differing conditions, situations and needs of women and men in all Community policies and actions thus underpins the principle of mainstreaming. This has been reinforced by past Community programmes on equal opportunities, particularly the fourth medium-term Community Action Programme (1996-2000); and mainstreaming is a core issue in the new Community Framework Strategy on gender equality (2001-2005).

The interpretation of mainstreaming at corporate level, however, gives cause for concern. In a minority of the case studies it is positive, and gender equality is taken into consideration in policies and practices and is embedded in the corporate culture, with specific action taken as required. These organisations, e.g. Italian case B (IT), have achieved real progress in promoting women to senior levels and improving the reconciliation of work and family/social life.

In other cases, however, ‘mainstreaming’ appears at best to describe good human resource policies and practices that simply aim not to discriminate; are likely to be implemented unilaterally; and, unlike other policies, are agreed with the unions. At worst, the term is used to justify why no specific equality action is taken.

The research also shows that organisations sometimes believe they can progress to mainstreaming once they have undertaken certain equality action and achieved some success. There are examples, however, to illustrate the flaws in this thinking if equality is not explicitly aligned with corporate strategy and cultural development, e.g. UK case B (public services). Responsibility for gender equality is devolved down through the organisation, but no overall plan, strategy or monitoring mechanism is maintained. The equality process may develop and good results may follow – but it may also just disappear.

It is clear from the research that the term ‘mainstreaming’ is being used to describe quite different approaches and practices, leading to very different equality outcomes. Piecing together the information, we propose that the main features of a comprehensive mainstreaming approach should include:

- Transversal equality action applied to different segments of a diverse workforce. New priorities such as race or multiculturalism should complement and not take the place of gender equality or cause gender equality action to fade away. The equality action should also ensure a focus on behavioural and cultural change.
- A continuous equality process where:
  - the organisation’s commitment to equality is declared and supported;
  - the business case for equality is continuously affirmed;
  - monitoring represents a key step for ensuring continuous incremental improvements (this demands that results are monitored by means of both qualitative and quantitative indicators, and that they are communicated to everyone).

- Explicit awareness that (a) introducing gender equality is an organisation-wide change process; and (b) other changes in the organisation of work can have an impact on the achievement of gender equality objectives. Gender equality should therefore be explicitly integrated into the organisation's strategic planning process.

Given the research results and the hypotheses drawn above, there is an urgent need to develop guidance on good practice as regards mainstreaming in the workplace, with particular emphasis on methods for monitoring equality progress from both a quantitative and qualitative point of view.

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## Chapter 9

## Bridging the gap between policy and practice

This chapter focuses on the implications of the research for policy makers at national and European levels. The focus is on how to bridge the gap between policy makers and equality practitioners at company level so as to further facilitate the development of gender equality in the workplace.

The research has highlighted the factors that appear to influence the breadth and scope of equality action, whether by initiating, facilitating or acting as a catalyst (see Chapter 3 and the *dynamic equality model* in Chapter 7). Among them, the institutional framework – legislation, national equality programmes and industry-wide collective bargaining, along with European policy, programmes and directives – featured prominently. The research has shown that harnessing these more positively could enhance the sustainability of equality in the longer term. Ways in which this could be achieved are outlined below.

### **Equality legislation and programmes**

Equality legislation and national equality programmes were seen to play a powerful role in initiating and facilitating gender equality action in the workplace. It is important to provide organisations with opportunities to exchange experiences, as well as to ensure publicity for their progress, and this should continue to be supported.

A weakness of the legislation and programmes, however, is their often short-term and limited approach. Additional action is required to identify complementary initiatives and operational tools that will help to broaden their scope and shift the focus to the medium and long-term sustainability of equality action.

Steps that could help overcome the current weakness and ensure that equality action is ongoing include introducing annual reporting or a fresh approach (that of the 'learning organisation') to the monitoring/assessment of projects receiving public funding and/or technical assistance; and/or recommending transversal action and a comprehensive process of change management.

## **Equality labels and awards**

Where funding or awards for equality action are granted, the selection criteria should include an assessment of the organisation's ability to ensure that the action is ongoing and includes the whole organisation, again through regular internal monitoring and an assessment of cultural change, for example.

## **Presenting the legislation positively**

For equality legislation to have the desired effect, it needs to be perceived by companies as an opportunity rather than a constraint. This can be achieved by disseminating examples of good practice and demonstrating how the legislative requirements can also help fulfil business needs.

## **The wider equality agenda**

As the equality agenda widens to include race, age, sexuality and religion, there is a danger that different inequalities may become emphasised as politically important at different times, to the detriment of others. In the workplace this is particularly likely when the motives for equality action are mainly legal or ethical. This can result – as illustrated by one of the UK case studies – in attention and resources being moved from one equality issue to another, instead of a comprehensive approach being adopted.

Switching focus and resources between equality issues is highly inappropriate, since they are all important and are all interrelated. For example, women are not a homogenous group, and their experiences in the workplace may be influenced not only by gender, but also by age, race, sexuality and religion.

Therefore, as the equality agenda expands, there is a need to understand the similarities and differences between the various groups' experiences; the different bases for discrimination; and what methods and tools can be applied to achieve improvements. While it is highly likely that each area of discrimination will continue to require specific research and action, various equality issues will also need to be addressed collectively, and strategies developed accordingly.

To promote action in each equality area, the different pieces of legislation should be clear and complementary. Also, research and the development of tools to help organisations to address a range of equality issues should be a priority. An example would be a monitoring tool to encompass multiple equality issues. This would lend support to the widening of equality policy and legislation, and help bridge the gap between policy and practice in the workplace.



## **The role of the social partners**

Since employer and employee associations have a significant influence on policy, the need to mainstream gender equality within them should be emphasised. Such organisations must monitor their own progress in the area, particularly as regards issues like cultural change and the balanced participation of women and men in key decision-making, consultation and negotiating roles.

The research has shown that the full involvement of the social partners and shared ownership of gender values facilitate equality action. It has also shown that in some companies equality action may actually go beyond the national and European policy objectives and legislative requirements. The evidence highlights the importance of a two-way communication process, ensuring information, consultation and the sharing of knowledge.

## **Trade unions and works councils**

Chapter 8 has already highlighted the importance of national industrial relations and collective bargaining, at both industry-wide and company level, in initiating and facilitating equality action. These can also exert a strong influence on the content of equality action.

The need for collective bargaining to incorporate the gender perspective into all areas of policy, and to increase women's participation in the bodies and decision-making processes involved, is highlighted by the Equality Plan adopted by ETUC and all its affiliates in 1999 (ETUC, 1999). The plan establishes priorities for overcoming problems in these areas, with progress to be monitored over a three-year period. The need for women to become more involved in decision making and collective bargaining has also been highlighted in the Foundation's report on equal opportunities and collective bargaining, which shows that the more women involved, the more likely it is that equality issues will be tackled (Bleijenbergh, 1999). This echoes the ETUC recommendations and previous Foundation reports on this topic.

## **The business case for equality**

As already indicated, when action on equality in the workplace derives only from ethical/legal considerations, it is likely to be very limited. When, on the other hand, a company identifies a link between gender equality and long-term business effectiveness and competitiveness, broader, more in-depth and longer-term action and commitment result. In practice this is not common, but organisations can be helped to develop a deeper awareness and understanding of the link. Firstly, policy papers referring to issues that affect business competitiveness (such as the need to modernise the organisation of work) could more actively emphasise the contribution gender equality can make. Secondly, European and national funding should be given to research and seminars aimed at building tools and guidelines to develop organisational understanding in the matter.

## **Building on the findings**

The research has highlighted the importance of equality action occurring throughout an organisation (rather than merely in part of it), and of a comprehensive change management approach that includes all the critical elements discussed in the first part of this conclusion. Particularly central to the achievement of gender equality is continuous monitoring, in which the indicators used should be not only quantitative (the number of people affected, take-up of measures, etc.) but also qualitative (behaviours, values, culture, etc.).

European programmes can play a key role in building on the research results and ensuring that they are translated into practical guidelines and tools that can be effectively communicated to equality practitioners at company level. This need should be taken into consideration in the design and funding of programmes at European and national level. To look at one example, the forthcoming Fifth Action Programme on Gender Equality (2001–2005) offers an opportunity to take a ‘customer-centred’ approach to equality by involving practitioners and other key actors at company level in the development of tools to facilitate the further development of gender equality in the workplace.

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## Appendix 1

## Promoting gender equality: research team

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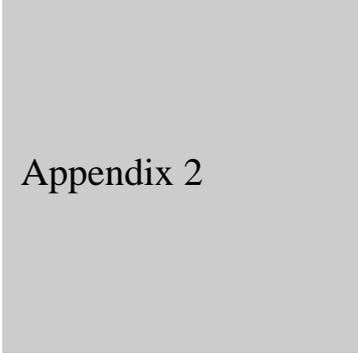
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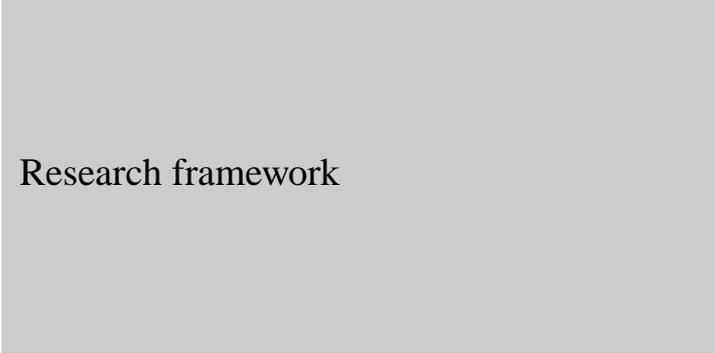
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## Appendix 2



## Research framework

The detailed framework for this project was presented as a working document at the first meeting of the research group in Brussels on 4-5 November 1999. The final document reflected the discussion that took place, and presented the guidelines for the national case studies and reports, of which this Appendix contains extracts.

### **Guidelines for the case studies**

#### **The national context**

In analysing case studies from different Member States, it is important to consider their national contexts and to highlight the trends, motives, influences and limitations that affect equality action in the workplace.

##### *Hypothesis:*

Key features of national contexts encourage or limit companies' motivation to undertake equality programmes in the workplace and influence the type of equality action undertaken.

##### Areas of investigation:

- i) Key indicators of women's position in the labour market
- ii) Key features of the institutional framework
- iii) An overview of the system of collective bargaining and industrial relations
- iv) An overview of the national position as regards equality in the workplace.

#### **The company**

##### *Hypothesis:*

Companies are motivated to implement equality action for a variety of reasons, which are linked to the external institutional framework; the marketplace; the labour market; and internal business objectives.

##### Key information requested to include:

- i) Background information on the company
- ii) The position of equality in relation to corporate strategies and policies
- iii) Motives for taking equality action.

## The content of equality action

### *Hypothesis:*

A comprehensive set of equality policies that consider both formal and informal aspects of organisational life, and that are reflected in procedures and practices, are required to achieve and sustain equal opportunities between women and men in the workplace in the long term.

A set of prompt questions and signs of evidence to look for in order to conduct an in-depth analysis of company policies, procedures and practices were provided to the national researchers. The questions were categorised to refer specifically to the following four areas:

- 1) Recruitment and selection
- 2) Professional development
- 3) Work organisation
- 4) The equality environment.

## The process for implementing equality action

### *Hypothesis:*

By following a process of implementation that contains a series of specific steps, organisations are better able to ensure effective results for equality policies, procedures and practices.

The steps involved in this implementation process may include:

- Analysing problem areas for equality in the organisation and seeking to diagnose the source.
- Setting goals for equality action (these may be qualitative and not necessarily quantitative) and making a plan to achieve them.
- Mobilising and organising the different actors to be involved in the equality process (including women and men employees, trade unions/works council, line management, senior management).
- Ensuring the appropriate investment in time, money and people.
- Monitoring and evaluating the results of all equality action.
- Communicating the outcome of monitoring and evaluation to the appropriate actors – both within and outside the organisation.
- Using the results of monitoring and evaluation to undertake fresh analysis, set new goals and make new plans.
- Maintaining interest throughout the company in the issue of gender equality.

Key questions include:

- What evidence is provided in the case studies that each of these steps is followed when undertaking equality action?
- How is each step undertaken?
- What is the impact of missing a step as regards the results of the equality action?
- Are additional steps taken, and if so, what are they, and what do they achieve as regards the results of the equality action?

## The outcome of equality action

### *Hypothesis:*

Undertaking a comprehensive assessment of the results of equality action will contribute to sustaining such action in the longer term (by identifying where further action should be taken), and will promote a greater understanding of the widespread need for equality and of its contribution to organisational success.

- What is the impact of the different equality policies, procedures and practices on:
  - Women and men (in terms of, for example, skills and career development; access to non-traditional jobs; the reconciliation of work and home life; equal pay; participation and involvement; and increased employability)?
  - The organisation as a whole (e.g. cultural and behavioural change to overcome gender stereotypes and assumptions; cultural change to be more open to flexibility and diversity; greater awareness of and



responsibility for equality throughout the organisation; the financial impact, including changes in turnover, productivity and absenteeism; the business impact, including changes in employee satisfaction, innovation and creativity, positive and/or two-way flexibility, public image, customer base, reflection of local community.

- Is the impact of equality policies, procedures and practices short term or long term: on women, men and the organisation as a whole?
- Were the results expected or unexpected?
- Were any negative effects experienced by women, men or the organisation as a whole?
- What aspects of the impact of equality action does the company assess?
- How are these aspects assessed?
- Who are the different actors involved in deciding on the assessment process?
- What are the future challenges facing the organisation as regards equality, and how does it plan to manage them?

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*Corporate strategies are nowadays considered critical in the promotion of gender equality in the workplace. Promoting an equality sensitive approach in human resource management is still a major challenge for companies and policy-makers. This report describes the operation of workplace gender equality strategies in seven countries of the European Union and assesses their impact on both employees and the organisation. It explains the reasons for the success or failure of these programmes and draws up recommendations for action aimed at providing decision makers with the relevant information they need in order to give an impetus to gender equality in the workplace.*

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