



## **EQUAL OPPORTUNITIES AND DIVERSITY TOOLKIT / BEST PRACTICES GUIDE**

**November 2006**



**A report for EURELECTRIC, EPSU AND EMCEF**

**By Jane Pillinger, Dublin**

## **What electricity companies can do to promote equality and diversity:**

- Make the **business case** for equality and diversity
- Ensure that there is **commitment** to equality at all levels of the organisation (executives, senior and middle management, staff and trade unions)
- **Mainstream** equality and diversity through the company and develop an organisation-wide approach
- Develop **policies, procedures and programmes** on equality
- Draw up **guidelines for managers** on how to implement equality policies and manage equality and diversity
- Support **women with potential**
- Provide equality and diversity **training for staff and managers** in order to change attitudes and behaviours
- Raise the profile of equality and diversity in the organisation through effective **internal and external communications**
- Collect **data, and monitor and measure progress**
- Implement structures for the **consultation and participation** of trade unions and staff

***Equal Opportunities and Diversity  
Toolkit / Best Practices Guide***



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## **PREFACE**

In their 2003 Joint Declaration on Equal Opportunities and Diversity the social partners of the Electricity Industry EURELECTRIC, EMCEF and EPSU stated their commitment to the construction of a “democratic, pluralist and open Europe that respects the dignity and integrity of all human beings”.

The social partners recognised the principle that “no discrimination shall be exercised against employees on the basis of age, health, national or ethnic origin, sex, sexual preference, language, religion, opinion, family ties, trade union activity, political activity or any other comparable circumstance”.

EURELECTRIC, EMCEF, and EPSU have since continued to work on Equal Opportunities and Diversity issues.

In 2004, a first project was realised that produced the report “Equal Opportunities and Diversity – Changing Employment Patterns in the European Electricity Industry”. The focus of the research was on “groups of workers who are potentially marginalised within the European Electricity Industry”. The report comprises a mapping of the European Electricity Industry workforce, an account of equal opportunities policies at supra-national, national and company levels and a report that provides the evidence base for policy making and learning strategies.

Based on this report a new project was launched to produce the “Equal Opportunities and Diversity Toolkit / Best Practices Guide”. It is the first textbook on these issues in the Electricity Industry and will take the results from an academic study to the level of practical implementation.

EURELECTRIC, EMCEF, and EPSU are committed to equality and diversity. The European social partners recommend representatives of companies and trade unions to use the toolkit at the appropriate level when addressing equality and diversity issues. It provides useful suggestions how to improve existing situations based on the experience of a wide range of Europe’s electricity companies.

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## Section 1: Introduction and context

### a) Equality in the electricity sector

The electricity sector in Europe has been through rapid changes and restructuring, the change from national monopolies to a business model based on market competition. This has brought with it new challenges and new possibilities for promoting equality and diversity in the industry and for integrating equality and diversity into the strategic development of companies and into effective human resource planning. The impact of this restructuring on equality and diversity is not fully known, although a study by EURELECTRIC (1999) found that the position of women had not improved after deregulation. More recently there has been a growing recognition of the importance of equality and diversity to business competitiveness.

Many electricity companies across Europe are making substantial progress in the area of gender equality and diversity programmes at work, and have policies and procedures in place on equality and diversity. In this Toolkit we profile a number of electricity companies in order to show that there is already significant work taking place to implement equality and diversity and to do so within a social partnership framework. What is clear from these profiles is that implementing equality and diversity requires a long term and sustained approach.

Although the focus of this Toolkit is on gender aspects of equality and diversity, it does highlight the need for a broad ranging approach to equality and diversity covering employees on the grounds of racial or ethnic origin, disability, age, sexual orientation, and religion or belief (in line with the European anti-discrimination legislation prohibiting discrimination, harassment and victimisations of employees).

In recent years equality legislation has been introduced in all EU member states by virtue of number legislative developments at the national level and through the transposition of EU equality directives. Compliance with the legislation places a number of requirements on employers to ensure that their policies, practices and procedures do not directly or indirectly discriminate against employees.

### Appendix 1 provides an overview of EU policy on equality and anti-discrimination

“A growing number of European companies are adopting diversity and equality strategies not only for ethical and legal reasons but also for the business benefits they are expected to deliver. Among the most important of these benefits are enhanced employee recruitment and retention from a wider pool of high quality workers, improving corporate image and reputation, greater innovation and enhanced marketing opportunities.”  
European Commission, 2006

### b) The purpose of the Toolkit

The main purpose of this Toolkit on equality and diversity in the electricity sector is to promote understanding and awareness of the management of equality and diversity in the workplace. It provides practical advice and tools for employers, managers and unions to accommodate and implement equality and diversity programmes and initiatives in the workplace.

The Toolkit is a result of a number of activities that have been undertaken by EURELECTRIC, EMCEF and EPSU, including a joint declaration by the Social Partners on *Equal Opportunities and Diversity*, and a research study on *Equal Opportunities and Diversity: Changing Employment Patterns in the European Electricity Industry*.

This practical advice and guidance on how to accommodate and manage equality and diversity in the workplace will cover:

- The business benefits of equality and diversity
- Integrating and mainstreaming equality and diversity into human resources and workplace policies
- Drawing up and implementing equality and diversity policies and strategies in areas such as recruitment and selection, work-life balance, sexual harassment, training etc.
- Presentation of practical tools and resources, such as how to carry out an equality review or audit in the workplace, how to ensure that pay systems do not under-value women's skills etc.
- Guidance and practical help on how to manage and monitor equality and diversity in the workplace
- Additional resources and further information

The Toolkit will show that there are many ways in which equality and diversity can be approached, although there are some underpinning principles and practices that are important for all companies to address. This can include implementing equality policies and improved opportunities for flexible working for all staff, supporting women into leadership positions and positions where they are currently under-represented, devising workplace actions to enhance gender equality, and integrating gender into collective bargaining and partnership working.

The Toolkit is divided into the following sections:

**Section 1** (this section) provides an overview of equality and diversity concepts and highlights the business case for equality and diversity in the electricity industry.

**Section 2** provides an overview of equality and diversity policies, practices and procedures that can be introduced in the workplace. This covers equality policies and strategies, recruitment and selection, dignity at work and equal pay for work of equal value.

**Section 3** presents a range of initiatives that can be put in place to provide a supporting workplace culture that focuses on equality and diversity. Key issues addressed are workplace change actions to foster an equality and diversity culture, including senior management support, training and awareness on equality and diversity, and encouraging more women into senior and non-traditional positions.

**Section 4** is devoted to work-life balance and flexible working hours and provides some tools for introducing smart and flexible working that is conducive to an organisational culture that accommodates diversity.

**Section 5** provides some specific equality tools to help organisations implement equality and diversity at a practical level, including equality actions plans, data and monitoring equality and diversity, and equality mainstreaming.

**Section 6** examines how equality and diversity can be progressed through a social partner approach by harnessing the potential for workplace solutions agreed between unions and management that can help to promote equality and implement diversity strategies.



There are various tools and templates as well as a guide to further information and resources in the appendices of the report.

Case studies from a number of companies across Europe, including a selection of electricity companies, are used to highlight different approaches to equality and diversity as well as challenges faced in implementing equality and diversity. In the electricity industry, case studies include: ESB Ireland, Enel Italy, Endesa Spain, Vattenfall Sweden, Statkraft Norway, Energie E2 Denmark, United Utilities UK, Empower Training Ltd UK, EON Hungary and DEMASZ Hungary.

Appendix 2: provides the contact points for further information about equality and diversity in these companies.

The aim of this section is to provide an overview of some key concepts, definitions and arguments about the role and purpose of equality and diversity. We look at:

- The business arguments and the business case
- Why equality and diversity matter in the electricity industry
- Definitions of equality and diversity
- Carrying out an initial assessment of your organisation

### **c) The business benefits of equality and diversity**

“There is a perception that diversity policies are a luxury. But it is precisely when a company is under pressure that the business case for diversity comes into place.” Kamaljeet Jandu, Diversity Manager at Ford plc, speaking at a European conference on the business case for diversity in 2006.

“In an increasingly competitive world for ESB, we need to attract and retain the very best staff and we need to make this a place where people want to work. We are making considerable efforts to attract a more diverse staff and, at all levels, we have helped staff to balance their work with their lives. This is a corporate objective and the biggest challenge we face.”

John Campion, Head of Human Resources at ESB, Ireland

Today equality and diversity is the key to creating thriving companies that have the competitive edge in a global market. The future success of companies in the electricity sector lies in the quality of the workforce. As a growing proportion of the workforce in the electricity sector, women can be the competitive edge that the sector needs.

It is worth noting that trade unions recognise the value of equality and diversity for the impact that it can have on jobs in the sector and also for the broader goal of achieving equality between women and men in work and in society in general. The social partnership approach is viewed as the best route to achieving equality.

A European Commission survey, carried out in 2003, of the costs and benefits of diversity in 200 companies in four EU member states found that diversity policies could help to strengthen organisational and human capital, which in turn is used by companies to create a competitive advantage. The benefits were found to include:

- strengthened 'cultural values' within the organisation;
- enhanced corporate reputation - around 69% of companies participating in the study stated that their reputation had been enhanced by diversity policies;
- better attraction and retention of highly talented people, cited by 62% of survey participants;
- improved innovation and creativity among employees. Just under 60% of participants said that the implementation of diversity policies had improved motivation and efficiency and 57% cited increased innovation;
- enhanced service levels and customer satisfaction, cited by 57% of participants;
- help in overcoming labour shortages, also cited by 57% of participants;
- reduced labour turnover;
- lower absence rates;
- improved access to new market segments;
- avoidance of litigation costs; and
- improved global management capacity.

The costs highlighted in the report include costs associated with the implementation of diversity policies, including the costs of complying with legislation, and changing the internal culture of an organisation in order to recruit, retain and develop a diverse workforce. Difficulties in changing the culture of business and a lack of awareness amongst companies of the contents, benefits, mechanisms and the rationale for diversity policies were found to be significant internal obstacles.

### **The business case for equality and diversity: summary of the main issues**

- Employer of choice with recruitment of the best candidates and retention of the best staff
- Workplace of the future
- Good employee relations
- Reduced costs and increased productivity
- Positive external and internal image to potential recruits and potential customers
- Compliance with equality legislation

#### *Employer of choice*

Today's companies recognise the importance of attracting, recruiting and retaining the best talent. Employers of choice are those that have put in measures to successfully recruit and retain people from a wide 'talent' base. This means having the best people with high-quality skills and in the right place at the right time.

#### *United Utilities, UK*

Because the business does not reflect the diversity of the society as a whole, the UU Board approved a diversity strategy. Key actions include monitoring recruitment and selection procedures, benchmarking performance against other major companies, implementing workplace policies which support flexible working, and carrying out equal pay reviews. A 'grow your own workforce' initiative has been developed with an equality and diversity focus.

### *Workplace of the future*

Forward-looking employers are those which recognise that the workplace of the future presents a number of challenges and opportunities. Employers increasingly have to be one step ahead by assessing employment trends on the basis that a more diverse workforce is an essential component of future workplaces. Addressing equality as part of this can help companies plan for a higher-quality workforce. This means that companies identify and resolve the barriers that prevent the organisation from making the best use of women's skills.

### *Good employee relations*

Equality and diversity can contribute to employee flexibility, as well as improving commitment and morale.

### *Reduced costs and increased productivity*

Costs associated with labour turnover and absenteeism resulting from stress/ill health is reduced and productivity is enhanced. Companies can save on expensive recruitment and training costs if they can retain their best staff, as well as reduce the cost of absences resulting from stress or difficulties arising from work-life conflicts.

### *Positive external and internal image*

Equality and diversity can help to promote a positive image of the company, which can help to improve the customer focus and provide services that are responsible to and accommodating of the diversity of the community. Creating a more diverse workforce will also help companies to better reflect the customer base and thereby meet wider customer demand. Widening the range of skills held by employees will help to improve the quality and responsiveness of service delivery.

### *Compliance with equality legislation*

All EU member states are required to implement anti-discrimination legislation in the areas of gender, age, race and ethnicity, disability, sexual orientation and religion or belief. Compliance with the legislation can save costs in the longer term and also present a positive message about the company.

### **What is the evidence of the impact of equality and diversity?**

The report of the Irish National Centre for Partnership and Performance (NCCP) on the Forum on the Workplace of the Future found that the promotion of equality and diversity builds competitiveness, innovation, organisational capacity and high-performance workplaces: "The most successful organisations recognise that working with diversity brings significant advantages, while employers who fail to make full use of the diverse capabilities of their employees miss out on a key source of innovation and productivity." (NCCP, Ireland 2005)

Research by the European Foundation concluded that many companies have found that a strong corporate culture which enables employees to reconcile work and family life, and which supports women's career development through gender equality policies, enhances staff motivation, productivity and loyalty. (European Foundation, 2002)

A survey of company policies on equality and diversity carried out by the European Commission ("Business Case for Diversity: Good Practices in the Workplace") found that nearly half of the 800 respondents have already implemented diversity policies and 85% report tangible business benefits.

A global survey carried out by the International Labour Organisation (ILO) found that achieving gender diversity in the workplace has been associated with improved business competitiveness. (ILO, 2004)

A UK study found that the FTSE 100 companies with women directors demonstrated the important talent pool of women and the benefits of having women in senior positions. Women in senior positions are more likely to promote best practice approaches to equality in corporate governance and to demonstrate the added value of equality to business success. (Cranfield 2005)

#### *Vattenfall, Sweden*

One of Vattenfall's five strategic ambitions is to be the employer of choice. On this basis it has developed a range of equality and diversity initiatives which are focussed on creating an organisation that values the talents of all staff and creates a work environment that meets employees' needs and strengthens their commitment. "One of the most important conditions for Vattenfall to create long-term profitability is the company's ability to attract, develop and retain skilled employees." Vattenfall knows that its future success will be based on a diversity model with "...the resources and strategies to create the conditions required to attract, develop and retain leading expertise and motivate employees to perform to the best of their abilities".

Vattenfall believes that equality and diversity is important to ensure that the company delivers its business on the basis that "diversity supports our efforts to become a more profitable, effective and attractive company". In particular, Vattenfall argues that "diversity triggers new ideas" on the basis that, "in the long term, our employees must reflect the societies in which we operate. We actively work to increase diversity as regards age, gender and ethnic/cultural background." According to Diversity Manager Lena Ohlsson, diversity has been important in changing the culture of the organisation and "brings new and fresh ideas, which in turn has brought new forms of creativity. If you take the area of work-life balance, there has been a whole organisational approach to this, which involves everyone in the company, not just women." Business benefits include enhanced employee recruitment, improved corporate image and a better understanding of customers and stakeholders. Vattenfall's long-term objective is to recruit an increased number of female managers so that they are representative of the female workforce (based on the same ratio of female employees to female managers). The company believes that this is important for attracting the most talented people to work in the company and also to ensure that women role models exist.

#### **d) Why equality and diversity matter in the electricity industry**

Across Europe women are participating in the labour market in increasing numbers and they are outperforming men in second- and third-level education. However, they continue to be under-represented in senior positions and in jobs deemed to be traditionally areas of male work. This is very much the case in the electricity sector, which has been traditionally an area of male employment.

According to the European Commission, the participation of women in the European labour market has been a contributory factor in economic growth. Improving the employment rate of women has also been a key element of the Lisbon Strategy (2000) to improve growth and prosperity in Europe in the light of growing global competition (the goal of the Lisbon employment target is a 60% participation rate of women, and a 70% participation rate for the population overall by 2010). In particular, reconciling work and family life remains one of the most important challenges for both women and men. Across the EU, Women with young children have much lower employment rates (13.6% lower than women without children). Women experience a gender time gap, often working shorter hours and in part-time positions in order to combine work and family responsibilities. This can impact negatively on their career development and promotion prospects.

Women perform the major part of domestic work and, consequently, have more limited time for paid work. Men do less than 40% of all domestic work and between 25% and 35% of childcare work in couples with children aged up to six years. Women also continue to earn on average 15% less than men in comparable jobs and there continues to be a lack of representation of women in senior and managerial positions. Often work stress is at the highest level in the 25–39 age groups, which are also the most significant years for family formation and career development.

*Statkraft, Norway*

Equality and diversity is very much embedded in Statkraft's company values and ethos. In part, this is a reflection of a long tradition and culture in Norway that has encouraged women's participation in the labour market and a labour market that values equality of opportunity. In Statkraft, the 'People First' philosophy and a focus on competence development has been the basis for creating a healthy workplace and a culture that encourages active employee involvement and commitment. Trade union participation has been encouraged and relations between trade unions and management have been consensual and largely positive. There is a "dynamic group-wide corporate culture that promotes diversity and tolerance" and a commitment to treating employees equally irrespective of religion, gender, sexual orientation, age, nationality, ethnicity, marital status, physical disability or characteristic, and will ensure that freedom of speech and employee rights are upheld" (2005 Annual Report). The company is considering how to recruit from a wider pool of potential employees and retain older workers, particularly as the working population ages. A competitive market in the future and a low unemployment rate means that the company has had to make efforts to recruit and retain the best and most highly skilled staff.

*Luciana Tarozzi, Consultant, former Senior Manager in Enel, Italy*

Luciana began working for Enel in 1965 in a junior administrative position in a district accountancy department and worked her way up to a senior management position. She worked in the company when it was first established as a public company whose goal was to contribute to the social development of Italy. After 10 years of working in Bologna, she moved to Rome when her husband was promoted in his job, at which time she arranged a secondment to Rome. She worked in a number of positions in the central directorate and describes her movement through the company as 'step by step'. She had an interest in professional development and saw possibilities to progress her career. Although she has always worked alongside men she was never penalised for being a woman, although she did experience some isolation at the top and paid a price for having a career, including long working hours. Luciana believes that women can get into senior positions on merit and that the company is now more open to women coming through the company. However, she recognises that it is very important to have work-life balance as it is easy for senior managers to pay a high price for being in senior positions. She also thinks that women are different today; they are more assertive, have more awareness and have high expectations.

**e) Definitions: what we mean by equality and what is diversity**

"Tapping into the potential of a diverse workforce enhances both corporate operations and the image of the employers and harnesses the full range of capacities of all employees." Equality Authority, Ireland

**Diversity** is about the recognition and valuing of difference in its broadest sense. This means creating a work culture and workplace practices that recognise, value, respect and harness the contributions and talents of all for the benefit of the individual and the organisation. Having a diverse workforce can also help to improve the image of employment in the electricity sector, improve productivity and work satisfaction, and maximise human resources so that staff feel valued and reach their full potential. In addition, accommodating diversity in the workplace can be an important pre-requisite for providing appropriate and relevant services.

**Equality** is about creating a fairer society, where everyone can participate equally and where everyone has the opportunity to fulfill their potential. In the EU equality legislation is designed to address unfair discrimination based on membership of a particular group. Gender equality means giving equal visibility, empowerment and participation to women and men in all spheres of public life. It means providing for equality of opportunity, equality of participation and equality of outcome. Equality can be pursued in two main ways. This is known as the dual approach and each process is complementary to the other. This includes:

- Positive action: specific policies to address gender inequalities and promote equal opportunities;
- Mainstreaming: active steps are taken to have gender equality incorporated into all areas of policy, in all areas of activity and at all levels.

**Equality and diversity** are not inter-changeable. They need to be progressed together since there is no equality of opportunity if difference is not recognised and valued.

Equality and diversity can be progressed in a number of ways depending on the circumstances at national level and priorities at company level. This can be a combination of legislative and practical initiatives. Legislation to protect rights and promote equality exists in all EU member states. This has resulted in a number of principles and a legal framework for equal treatment and non-discrimination.

*Endesa, Spain*

Endesa has developed an equality and diversity project in order to take the company forward so that it fully embraces diversity in all of its operations. A strong business case for equality and diversity has been established and the company recognises that managing diversity is an imperative for leadership. The company has been through an important period of growth in recent years which has resulted in acquiring and integrating several companies in Spain and abroad. Today is it a very complex and diverse company. The company recognises that the integration of diversity is key for the future.

#### **f) Carrying out an initial assessment of your organisation**

The following checklist aims to get organisations assessing potential barriers experienced by women in the workplace:

**Checklist: assessing the barriers experienced by women in the workplace.**

- What are the main barriers that prevent women and other under-represented groups from taking up senior or non-traditional positions?
- Have you consulted with women to find out, from their experience, what are the main barriers?
- Do women have equal opportunities for promotion/career development as men?
- Is there gender balance at all levels of the organisation and are women employed at all occupational levels?
- Can staff balance work and family life and do all employees have access to flexible working hours?
- Are your recruitment procedures equality proofed?
- Do you have measures in place to encourage more job applications, including those for senior positions, from women?
- Do women returning to the company after maternity leave experience demotion or relocation to jobs below their skills level?
- Do women who work flexible hours have equal access to training, promotion and career development?

A useful starting point is to assess progress in promoting equality and accommodating diversity. The link below is to an assessment tool that covers areas such as work practices, work culture, policies and procedures. It then identifies areas that can be developed in the longer term to help organisations develop their equality and diversity systems. Download the assessment tool: <http://www.equalci.ie/download/healthcheck-manual05.pdf>

See Box 1 for an overview of the main barriers and actions to remove the barriers experienced by women in the labour market.

<b>Box 1: Examples of actions to remove barriers experienced by women in the labour market</b>	
<b>Barriers to women's progression in the labour market</b>	<b>Action that can be taken by companies to remove the barriers</b>
<p><i>Flexible working hours</i></p> <ul style="list-style-type: none"> <li>• Women often pay a price for flexible working hours by missing out on promotion or other career development opportunities while they have care responsibilities.</li> <li>• Managers are not always equipped to respond effectively to workers' needs and preferences. Often supportive managers are working within an inflexible structure.</li> </ul>	<p><i>Flexible working hours</i></p> <ul style="list-style-type: none"> <li>• Develop a company work-life balance policy and ensure that it is targeted at women and men.</li> <li>• If there are long working hours, look at how working smartly and work culture can be changed so that it does not disadvantage working parents.</li> <li>• Put in place training for managers on managing flexible working hours.</li> </ul>
<p><i>Childcare issues</i></p> <ul style="list-style-type: none"> <li>• In some companies, women with childcare responsibilities face significant difficulties in combining work and family life and this is often a major barrier to their progression.</li> </ul>	<p><i>Childcare issues</i></p> <ul style="list-style-type: none"> <li>• Appoint a childcare coordinator or a contact person in HR who can help find solutions to childcare problems faced by staff.</li> <li>• Put in place a range of flexible working hours arrangements.</li> <li>• Develop partnerships with local communities and local providers to establish and provide childcare for staff.</li> </ul>
<p><i>Culture of the organisation</i></p> <ul style="list-style-type: none"> <li>• Women are not always seen as a long-term resource for the organisation.</li> <li>• There is often a perception that men will be promoted. Whether this is real or not, this has an impact on women's confidence to put themselves forward for promotion.</li> <li>• Many companies present an age and gender profile that impact on the image of the company.</li> <li>• It is perceived that women have to be very 'tough' and be 'like the men' to succeed in senior management positions.</li> <li>• In some cases, there is a work and organisational culture that values men's contributions rather than women's.</li> </ul>	<p><i>Culture of the organisation</i></p> <ul style="list-style-type: none"> <li>• Make an explicit commitment to the business case for equality and diversity.</li> <li>• Aim to change the culture of the organisation so that women are viewed as a long-term resource.</li> <li>• Put in place visible and transparent systems for recruitment and career progression.</li> <li>• Present positive images of women, older staff, disabled staff and minority ethnic staff in publications and marketing.</li> <li>• Combat negative images and perceptions by highlighting the qualities that women bring into management or in non-traditional areas of work.</li> <li>• Change descriptions of engineering and technician positions so that they focus on customer service and customer contact in order to attract women applicants.</li> <li>• Make visible statements, in annual reports, web sites and other publications about the company's positive role in valuing and accommodating diversity.</li> </ul>
<p><i>Women's confidence and self-esteem</i></p> <ul style="list-style-type: none"> <li>• Women can experience isolation and a hostile working environment, which in turn can impact on self-esteem and confidence.</li> <li>• Women sometimes talk themselves out of applying for promotion, have less confidence and self-esteem than men, are less assertive and are not so good at selling themselves at interview.</li> <li>• There are few positive role models for women, whereas men have many role models. This helps men to be more strategic in the planning of their careers and progression.</li> </ul>	<p><i>Women's confidence and self-esteem</i></p> <ul style="list-style-type: none"> <li>• Break down potential isolation by putting in place support structures such as mentoring or buddy schemes.</li> <li>• Specifically target women in recruitment for apprenticeships, traineeships and internships.</li> <li>• Put in place open and transparent internal recruitment structures and procedures.</li> <li>• Interview all women candidates or ensure that there is always at least one woman being interviewed for a position. This can help to raise the visibility of women, and enhance women's experience and confidence in interview situations.</li> <li>• Promote positive role models of women in posters, recruitment, and publicity and marketing materials.</li> </ul>





## Section 2: Equality and diversity policies, practices and procedures in the workplace

### Introduction

The aim of this section of the Toolkit is to show how policies, practices and procedures can be drawn up and implemented. This will cover:

- a) Equality policies: how to develop an organisational-wide approach to equality and diversity through the development of equality policies
- b) Recruitment and selection
- c) Dignity at work, sexual harassment, harassment and bullying
- d) Equal pay for work of equal value
- e) Developing a strategic commitment to equality in the organisation
- f) Equality infrastructure: equality officers and equality committees

Successful approaches to improving the gender balance in an organisation require a range of policies and supportive actions. Identifying the internal organisational conditions is also important to the success of equality. Examples of what can contribute to this are:

- An innovative approach to human resource management
- A partnership approach to industrial relations at company level
- An explicit goal of equality embedded into the company's strategy, and a supportive organisational culture and values<sup>1</sup>.

Implementing diversity means that organisations need new thinking and an openness to change. Managing diversity successfully can result in mutual benefits for employers and employees.

#### *Enel*

In Italy, a number of sectoral agreements contain some relevant provisions, such as the establishment of joint equality bodies, observatories and working groups to monitor employment statistics and promote studies and analysis aimed at designing positive action plans. In Enel, equality and diversity is integrated into CSR, which refers to human rights and non-discrimination in company policies and procedures, including recruitment and selection. A key issue is that the company requires all activities to be proofed against the Code of Ethics, which makes a declaration of commitment signed by employees. Equality and diversity are integrated into the Code of Ethics, the principles of which commit the company to non-discrimination and impartiality in all of its activities as well as valuing the dignity and integrity of all staff.

### a) Equality policies

Workplaces that have formal employment policies are more likely to have a positive impact on employees' attitudes to their work and well-being (including areas such as work-related stress, job satisfaction and greater organisational performance). Having an equal-opportunities policy can also help to demonstrate that discriminatory working practices will not be tolerated in the company. A requirement to comply with this policy can also be incorporated into contracts with suppliers.

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<sup>1</sup> Evidence of this approach has been highlighted in research by Olgiati and Shapiro (2002); European Foundation for the Improvement of Living and Working Conditions (2004); CSR Europe (2006); TRED Equal Project (2006); Pillinger (2006).

### Checklist: what should an equality policy include?

- An equality statement setting out the core values and principles of the organisation. This should state clearly how and why achieving equality and diversity is an important goal for the organisation. This can affirm the equal treatment of employees covering the grounds of gender, race and ethnicity, religion and belief, age, sexual orientation and disability.
- Presentation of company policies and specific actions that impact on equality and diversity. The aim should be to have a strategic approach to equality and diversity alongside measures to implement equality and diversity in practice.
- Include issues such as recruitment and selection, staff retention, progression, training and development, working time and flexible working hours, pay, rewards and benefits, harassment and sexual harassment, equal pay for work of equal value, health and safety, consultation and participation of unions, data collection and monitoring, and reporting of equality outcomes, roles and expectations of managers and employees.
- Provide explanations of how policies can work in practice with good practice examples in the areas covered in the policy.
- Set out clear procedures for implementing and monitoring the policy.
- Draw up your policy with full participation and involvement of staff and unions. Not only does this ensure that you get the right focus to your policy, it will also become easier to implement. This will help with disseminating information about the policy widely and getting the buy-in from staff.

Review your current policies, procedures and practices to identify where changes may need to be made.

- Do your policies have an adverse impact, which may be unintentional, on some groups of employees?
- Do your policies promote people's dignity and respect?
- Do they accommodate the different needs of employees?

An example of a diversity statement can be found below from Empower Training Services Ltd, a provider for training to the energy sector in the UK. The diversity statement is intended to show that the company provides services that are welcoming and accommodating of diversity.

#### Empower Training Services Ltd



#### Diversity Statement

##### Main Aims

- Develop an organisational culture that welcomes and promotes equality and diversity.
- Develop expectations and attitudes amongst staff at all levels which reflect the values of a diverse society.
- Ensure that every activity will positively contribute to, maintain and reflect the diversity of the organisation.
- Ensure that equality and diversity is reflected in the policies and strategy of all our partner organisations, both at an operational and strategic level.

##### Promote inclusion and increase participation

- Communicate our high expectations to partners and other agencies, making it clear that poor performance is not acceptable.
- Agree success factors and targets with partners and other agencies and agree ways of evidencing these.
- Develop and agree processes to review inclusive learning, widening participation and lifelong learning that will allow unbiased judgements to be made.
- Develop links with other local agencies to identify and reach under-represented groups and individuals.
- Seek to develop clear procedures for recording any incidents of discrimination, harassment and bullying.

#### Dignity at work and valuing people

- Promote excellence and good practice for learners with learning difficulties, differences and disabilities.
- Encourage working environments in which all individuals, regardless of their background, feel comfortable and can carry out their training without unfair and unhelpful interference.
- Promote a climate in which the views of people with a disability are valued and acted on as part of the decision-making process.
- Carry out regular audits of the support available for learners with learning differences, difficulties and disabilities.

#### Acknowledge, measure and celebrate success

- Develop and agree impact measures to assess progress made.
- Set up monitoring systems to see how well the needs of different groups are met.
- Obtain local data in order to identify gaps in learning to assist planning.
- Publicise good practice, and individual and organisational success stories.

### **Equality and diversity policies in the electricity industry**

There have been a number of different approaches to equality and diversity policies in the sector. The three main approaches cover the following:

- Integration of equality and diversity into human resources policies, sometimes with a separate section or chapter on equality and diversity.
- Standalone policies on equality and diversity, which may or may not be cross-referenced with the main human resources policies.
- Mainstreaming approaches that decentralise responsibility for accommodating diversity to business units.

The following examples from Endesa, Energie E2, Vattenfall, Enel and ESB show the different approaches. Key to all of them is the importance attached to the strategic development of equality in the organisation.

#### *ENERGIE2*

Danish energy company E2 has developed a human resources policy that integrates equality and diversity policy, covering recruitment, promotion and career planning. There is a specific chapter concerning senior members of staff and provisions for flexible working time as staff approach retirement. This was recently amended to provide flexible working opportunities for all staff.

The policy has been implemented through each of the business units in the company. Managers from each business unit have received training and guidance on how to implement the policy, which has been well received by managers. At a half-day meeting of all managers, practical guidance and examples of how to implement the policy were provided. To date, the company is pleased with the progress that has been made in the implementation of the policy.

The policy outlines the company's general attitudes and values in relation to all areas concerning its employees. The aim of the HR policy is "to be instrumental in providing the framework of an inspiring and attractive workplace, which must be capable of attracting and retaining competent employees". Equality and diversity are integrated into the policy, which was adopted at the Joint Consultative Committee of trade unions and management in 2001.

The President and CEO of the company states that the policy "is based on the fundamental view that the individual employee should be treated as a whole human being, and it should contribute to developing a good life both inside and outside E2. We see employment with E2 as a cooperation agreement between the employee and E2 in which both parties show consideration for one another in constructive dialogue.

The HR policy must ensure that all employees, regardless of age, sex, education, etc., enjoy the same opportunities and conditions at work. The attitudes and values set out in the policy must be used with care and responsibility.”

The policy covers:

- Core values based on business and corporate culture
- How we would like our workplace to be
- Expectations for the manager
- Expectations of the employee
- Recruitment and hiring of new employees
- What E2 offers: terms and conditions of employment (covering working hours, pay, non-discrimination, in-house recruitment, pensions and insurance, from junior to senior, maternity and paternity leave, termination of employment and redeployment)
- Development and training
- Social responsibility
- Welfare
- Communication and cooperation

The policy was developed jointly between the company and the Works Council, which represents blue-collar, white-collar and professional trade unions in the company. The unions were happy with the process and the outcome of the policy. This policy framework is important because the main collective agreement for the company, which covers issues such as pay and working hours, does not have a specific clause on equality.

#### *Vattenfall*

Diversity has increasingly been seen as part of the business objectives and the competence development of the company. A few years ago, Vattenfall won a national award for being the company with the best equality policies in Sweden. A number of guidelines and instructions on diversity have been drawn up by the company concerning recruitment, work-life balance and competency development.

The company’s human resources strategy sets out the challenge for Vattenfall to be a company of first choice, achieved through an attractive work environment, by attracting external competence and developing internal competence. Diversity is envisaged to be something that is part of the daily business life of the company based on a vision that employees should reflect the societies in which the group operates as regards gender, age, ethnic or cultural background. The policy focuses on culture and organisation: “For Vattenfall, diversity and equal opportunities mean that all employees should have the same possibilities and rights regardless of gender, age, ethnic or racial origin, disability, religion or belief, sexual orientation or other circumstance. No form of insulting behaviour or harassment is accepted; everyone is treated with respect.”

#### *ESB*

Sixteen years ago ESB launched a major initiative on gender equality that resulted in a range of equality policies and the appointment of an Equal Opportunities Manager and a number of support staff. The office initially focussed on gender issues, but in more recent years this has embraced the wider diversity agenda. Today ESB has a wide range of policies on equality across the nine equality grounds covered by Irish Equality Legislation. These policies are integrated into the HR strategy for the company and are integral to the company’s progressive attitude to people management. These policies include an *Equal Opportunities and Diversity Policy*, which focuses on customers and staff across the nine grounds and covers respect and dignity in the workplace, recruitment and selection, career development, working arrangements, and equal pay. New employees are given a copy of the policy and a DVD/video has been produced for the purpose of training on equality issues.

Other policies include a *Policy on Cultural Diversity* which has a focus on inter-culturalism in the workplace in order to overcome racism; a *Code of Practice for People with Disabilities*; a policy on *Respect and Dignity for the Individual in ESB* which deals with the prevention of bullying, harassment and sexual harassment; a *Guide to maternity leave entitlements*; and a policy on work-life balance *Striking the balance*.

The policy on harassment and sexual harassment is supported and implemented through a system of designated contact people, management training and widespread publication and awareness raising. All policies are featured on the Equal Opportunities dedicated intranet site which is accessible to staff. ESB is developing a high-level equality strategy, which will integrate all policies and mainstream supports covering the nine equality grounds.

**An equality checklist can be found in Appendix 3. This can be used to help identify the main priorities in the development of an equality policy or strategy.**

***Ana Brogi, Manager responsible for quality control in infrastructure, Enel, Italy***

Ana joined the company in 1982 as a biologist and worked for 10 years in the nuclear sector as an expert working on environmental control in nuclear power plants. Following the Italian referendum on nuclear energy in 1988, she moved to the thermal electrical sector as an environmental specialist with responsibility for the authorisation of thermal-electrical plans. After seven years in this post, she worked in a number of positions in the area of health and safety and then as a manager responsible for authorising plants, and later in a position with responsibility for quality, safety and the environment with a special proxy for energy efficiency. Today she manages 60 engineers. She has found that, in recent years, more women have been entering engineering, although the numbers are still very low. Ana says that women working in non-traditional areas “must be more aware of themselves and must be as good as, if not better, than men in technical areas; women have to be tough”. She has some women engineers on her team who have young children and she believes that, as a female manager, she is more aware of the needs of her female staff, particularly in helping them to gain a work-life balance. Ana believes that the company will benefit from more women in non-traditional areas in the future, but a change in company culture to reflect women’s needs and values is necessary.

## **b) Recruitment and selection**

Equality and diversity employers are those that promote best practice in recruitment. This not only gives them access to a pool of the best employees but also helps to enhance the public image of the company.

Organisations that have examined how their recruitment and selection procedures impact on equality and diversity are, therefore, likely to find the staff with the skills, expertise and qualifications. The best people will be attracted to organisations that have transparent, systematic and fair recruitment and selection procedures.

It is worth considering drawing up a recruitment strategy that sets out targets and objectives for recruiting candidates from under-represented groups. Issues to address are talent identification, recruitment, development and training.

***Vattenfall***

Developing transparent and open recruitment requires a suitable applicant specification so that stereotyping is avoided. An open recruitment process has been achieved through the provision of equal opportunities training to interview panels so that transparent equal opportunities principles are incorporated into interview procedures. Another strategy used is to ensure that there is at least one female candidate for all executive positions. By doing this, it is possible to raise the profile of women as potential executives for future positions.

*British Telecom* has tried to attract more women engineers into the company by removing the word ‘engineer’ from the job-title for field service apprentices and they are now referred to as ‘Customer Service Technicians’. References to the need to ‘work down holes and up poles’ have also been removed from recruitment advertisements and greater emphasis is placed on the customer service aspects of the role. The result is that more applications have been received from young women than in previous years. Managers conduct interviews using a template in order to structure and score the applicant’s performance and provide a fair and objective interview.

## Checklist of issues to consider in recruitment and selection

### *Pre-recruitment*

- Review recruitment and selection criteria to ensure that they do not contain outdated, narrow or irrelevant criteria that may exclude or discourage some groups.
- Carry out equality and diversity training for managers and others involved in recruitment to ensure that they are aware of the business case for diversity and are able to make decisions free from bias.
- Consider how and where flexible working can be promoted and implemented within the organisation to attract and retain talented workers of both sexes.
- Be proactive in recruitment, for example, by adopting positive action strategies to encourage applications from under-represented groups.
- Consider campaigns to recruit more women into non-traditional areas, e.g. by advertising jobs in women's magazines and through women's community groups.
- Ensure that recruitment agencies and head-hunters present female employees for interview.

### *Talent identification and development*

- Develop strategies for identifying and developing talent within the organisation. Identifying potential new positions from a wider pool of possible candidates can save recruitment costs.
- Develop specific training programmes for women and men to progress through the organisation and target potential female managers.
- Widen the pool of female graduates into engineering through the targeting of publicity and information.
- Highlight new sources of employees by taking a wider view of potential employees.

### *Drawing up the job specification*

- Prior to recruitment, ensure that you are clear about the skills you are looking for. The best way to do this is to be systematic and have a clear skills or person specification (that sets out the main responsibilities and skills required).
- Ensure that the requirements of the job actually relate to the job that needs to be done.
- Ensure that the job specification and job description are gender neutral.
- Think about the way in which the job is being drawn up and other ways that the job can be done.
- How can the job be made attractive, for example, by offering flexible working hours, flexi-time, opportunities to work from home, or to bank time?

### *Advertising positions*

- Put in place positive images of women working in non-traditional and senior positions in your publicity.
- Avoid informal procedures and word of mouth. Advertise widely in magazines and newspapers that are read by women.
- Avoid using gendered language that associates the jobholder with one or other gender.

- Remove any unintended sex stereotyping in job descriptions and advertisements.

#### *Recruiting and interviewing candidates*

- Equality proofs your recruitment and selection process. Are there any elements of the process that potentially disadvantage women candidates?
- Improve gender balance on interview panels. Have a panel of trained women interviewers within each organisation and external women HR consultants to draw on. This can help to ensure that the interview panel does not automatically hire someone like themselves.
- Ensure recruitment decisions are as objective as possible by putting in place explicit selection criteria and adopting a structured approach to interviewing and recording the outcomes of interviews, for example, using a scoring system and keeping notes of decisions.
- Provide recruitment training for interview panels to ensure that proper and transparent procedures are put in place and that any attitudinal barriers are addressed.
- Avoid making assumptions about people's ages, physical attributes such as strength or height, length of service, full-time working etc.
- Ensure that the recruitment procedure addresses abilities and aptitudes. Avoid any use of stereotypes or judgements about an individual's capacity based on their gender.
- It is always important to give candidates an opportunity for feedback. This can help provide a supportive environment for women candidates for senior or non-traditional jobs.

#### *Monitoring*

- Monitor your advertising, recruitment and appointment methods.
- Monitor the numbers of women coming forward for interview or promotion. Identify any barriers that may be in place.

#### *Succession planning*

- Integrate equality and diversity into succession planning and workforce planning.

### **c) Dignity at work, sexual harassment, harassment and bullying**

Promoting dignity at work and combating sexual harassment, harassment and bullying are integral to equality and diversity. In some companies in the electricity sector this is the subject of separate policies, whilst in others the issues are integrated into general human resources policies.

#### **Checklist of issues to consider in implementing dignity at work**

- Lead by example at all levels of the organisation by creating a culture that promotes dignity and where staff and customers are treated with respect.
- Develop and implement a policy on dignity at work; publicise the policy and provide training for managers and union representatives on how to deal with formal and informal complaints.
- Set up a structure for confidential contact points to provide advice and information in all departments across the organisation.
- Introduce a "zero tolerance" approach to tackling harassment and bullying.

#### **d) Equal pay for work of equal value**

On average there is a gender pay gap (i.e. the gap between women's and men's pay) of 15%. This exists because of a number of processes and behaviours in the workplace as well as the way that the actual pay rate for a particular job is determined. In practice, it is the undervaluing of women's work and skills that is one of the biggest barriers to equality at work.

Ensuring that pay systems are free from discrimination and do not under-value the work carried out by women can have positive outcomes for companies. In particular, women's rising expectations and demands for equality at work and fair treatment cannot be ignored if employment in the electricity sector is to be the employment of first choice.

Both men and women will view employment attractively if decisions about pay are made objectively and fairly. Rewarding staff for their skills can be highly motivating; doing the opposite can create a negative impact.

Employers who pay women wages that match their value can create a positive work environment. This can help to increase productivity, reduce absenteeism and sick leave, and create a positive image with customers. Avoiding litigation is a major issue for employers and this works in favour of the development of fair and transparent pay systems and of ensuring that pay equity is taken seriously in collective bargaining.

#### **Checklist of issues to consider on women's pay**

- Talk to women in the workplace and find out what their concerns are, how they rate their work, and whether they experience pay discrimination.
- Suggest ways in which pay systems can be made more visible with accessible information and data about pay and grading.
- Enhance the value placed on women's jobs through job evaluation. This can address discriminatory grading schemes and reveal hidden assumptions made about the value of women's and men's skills and jobs.
- Tackle occupational segregation where women are clustered into female-dominated and low-paid job categories or grades.
- Improve access to higher-paid jobs that are typically carried out by men through skills training and career development for women.
- Promote equality in collective bargaining and ensure that negotiations between employers and unions incorporate a gender perspective.
- Identify any elements of pay that discriminate against women e.g. bonuses, non-monetary payments, pay increments, criteria for performance-related pay etc.
- Investigate whether particular groups of workers are discriminated against in their pay, for example, part-time or temporary/contract workers.
- Ensure that there is an ongoing collection of statistics and monitoring of the progress in reducing the gender pay gap.



**A model equal pay policy, which can be used and adapted by companies, can be found in Appendix 4.**

### **Job evaluation free from gender bias**

Job evaluation schemes compare jobs by looking at the duties and responsibilities that go with a job. Job evaluation can be used to enhance the value placed on women's jobs, address discriminatory grading schemes and reveal hidden assumptions made about the value of women's and men's skills. It is important that they can tackle occupational segregation where women are clustered into female-dominated and low-paid job categories or grades. However, job evaluation, if conducted in a gendered way, can reinforce existing discriminatory assumptions and stereotypes.

The best job evaluation systems provide for an analytical method using four basic factors.

- **Skill:** the experience, training, education and ability required to do the job. This includes the mental and physical abilities required to perform the job and considers variables such as complexity, difficulty and speed.
- **Effort:** the physical or mental exertion needed to perform the job. This includes the intellectual and physical effort and variables such as frequency, duration, exertion, strain etc.
- **Responsibility:** the extent to which employees are accountable for the work that they do and the impact or importance to the organisation. This refers to the importance of certain elements of a job and its impact on the organisation. It includes human, technical and financial resources and variables such as importance, size, value and accountability.
- **Working Conditions:** the physical surroundings and hazards of the job. This refers to the work environment in which employees are required to perform their jobs. It includes physical and psychological conditions and variables such as danger, unpredictability, negativity, duration and frequency.

Many organisations have found that the value of the work done by women is often overlooked in the setting of wages. Examples of skills typically held by women include manual dexterity skills or the ability to cope with the stresses involved in providing front-line services and in dealing with the public. Good job evaluation schemes are those that avoid gender bias and that question prevailing stereotypes about the worth of women's work.e) **Developing a strategic commitment to equality and diversity**

Developing an equality strategy with long-term and short-term goals and objectives can help to sustain equality policies in the long term and keep the momentum of equality going. This is an effective way of ensuring that there is a whole organisation approach to equality and diversity.

An equality strategy can also set goals and targets, for example, to improve the representation of women in senior management positions, on the Board of the company, of women working in non-traditional areas such as engineering or the number of women that are interviewed for positions in the company.

### *Endesa, Spain*

Endesa's HR department recognises that diversity is an integral part of the culture of the company and a core feature of corporate social responsibility. The objective is that the management of key areas such as work-life balance become automatically operational issues. The starting point in developing a diversity strategy has been to collate data on workforce composition and the representation of women, coordination and integration of activities that currently contribute to the accommodation of diversity, the preparation of equality and diversity training for managers and initiatives to raise awareness about the business case for diversity and understanding of the concepts.

According to Endesa's Diversity Manager, Arantxa Balsón Yarritu, all policies and practices have to be rooted in HR approaches to diversity. "I am passionate about diversity. It is the future. This is not about a short-term business case – this is a long-term issue that needs to be developed through a process. We need to keep focus and motivation"

Endesa is currently establishing the main principles, which will be agreed in the corporate HR and implemented through corporate, business and company levels and for progressing diversity through the different HR teams in Europe, Spain and Latin America. Diversity is seen as both a leadership and a strategic objective that will be proactive and integrated into day to day operations. With changing demographics, tighter markets and a scarcity of labour Endesa recognises that diversity will bring competitive advantage by reaching out to new markets by attracting, developing and retaining the best talent.

The first steps in defining the strategy have included understanding diversity in the organisation, as well of clients, suppliers and partners that the organisation works with. This means also understanding the risks as well as the opportunities that diversity can bring. The strategic support from the leadership of the company is seen as integral to the success of the strategy.

Endesa's policy on the management of diversity states that the company "respects and values diversity and the differences between people as a positive element and a fountain of organisational wealth which we want to manage respect and encourage within the framework of the values and organisation culture". The policy states that the management of diversity includes a number of elements including the personal and professional development of employees, opportunities for learning and a greater capacity for employees to be productive, innovative and creative. Other elements cover Endesa's relationship to its shareholders, to the diversity of customers and to broader society through social responsibility to women and minority ethnic groups in the community. The principles of the diversity policy state that diversity is a positive value and source of wealth for the organisation and that Endesa recognises and respects the differences between people and that managing them effectively allows for the maximum of development of people and their involvement in company objectives. The policy has a focus on three strategic areas: culture, gender and age. The policy sets out the aims of two types of actions: the integration of process for people management and the development of specific programmes or projects. The policy highlights the need of the engagement of the senior leadership in the company in translating the policy into specific action. Specific communication and training plans will be in place to support this global effort.

In summary the development of the strategy includes:

- An agreed set of principle on equality and diversity that are shared by the whole organisation. This will form the basis of the policy that will be cascaded through the organisation.
- A toolkit to raise awareness about equality and diversity and why it is important to link diversity and equal opportunities.
- A strategy for the company that sets out a clear business case that will operate in a highly diverse market. This proposes the formation of a team together from different business sections.
- A diversity observatory to help develop thinking and share good practices.

## f) Equality infrastructure: equality officers and equality committees

Many companies have put in place mechanisms for promoting equality and diversity at work. In some companies, equality and diversity officers have been appointed in order to progress equality and diversity issues throughout the company. In others, an equality committee has been established for this purpose.

Having a dedicated equality officer and an equality committee can also help to promote a mainstreaming approach (the development of this approach is discussed further in section 6). In some companies, equality and diversity committees have been replaced by mainstreaming, although there is also likely to be some form of joint council (between unions and management) for progressing equality issues. For example, in Vattenfall in Sweden the equal opportunities committee has been replaced by a decentralised approach to implementing equality in business units. The organisation carries out equality action plans on an annual basis and a partnership body made up of unions and managers oversee the implementation and monitoring of the plans.

### *ESB Equality Office and Manager*

In 1991, ESB created an Equality Office with appropriate resources and appointed a Manager who reported directly to the HR Director. The company has seen the added value of the Equality Office and manager, particularly in proactively pursuing a programme of change and innovation around equality initiatives. It was important that someone had overall responsibility to ensure compliance with the equality legislation and to promote the business case for equality in the organisation in the initial phase. The main role of the Equality Manager is to ensure that policies and procedures are in place, particularly in ensuring that the organisation is not just compliant with the equality legislation but also is proactive in looking ahead and in identifying models of best practice that can be emulated in ESB. The role of the Equality Manager and the Office originally was to promote greater gender equality but today there is a much wider focus on the nine grounds of discrimination that are covered under the Irish anti-discrimination legislation, which extends to equality for both employees and customers. A significant part of the Equality Manager role is as a resource to management and staff, to ensure that equality and diversity issues are kept on the agenda and to support HR managers in being involved and inspired. Activities include equality proofing all collective agreements, drawing up new policies, raising awareness, working closely with trade unions and with the Joint Equality Council.

Freida Murray, who has been Equality Manager for the last eleven years says that she finds the job “immensely satisfying and but also it can be frustrating at times; there are times when I feel like an ombudsperson because staff have recourse to the office and will often contact us if they feel that no one else is listening to their complaints. The office is considered to be independent of the normal day to day business and in this way; staff are more inclined to come to us with their issues. If we can help to diffuse and solve a situation before it becomes a case of discrimination or bullying, then we are happy to do so and this is very rewarding. Equality is a long-term initiative, it’s a journey not a destination and for this reason is difficult to assess progress. I think that sometimes we can get lost by just focussing on diversity and it is essential to recognise that we have the gender issue first. That should be the basic starting point and after that we have all the other elements of diversity that impact on men and women. It is important to keep that in mind especially in a male dominated work situation. Having a designated equality figure head has been important to ensuring that the business case for equality and diversity is driven, promoted and implemented in full”. In particular, the focus on gender equality in the past few years “has helped to attract women into the organisation and has helped to soften the macho image of what was a very male dominated organisation. We now have an acceptance at all levels that men can also ask for time off to spend with their family”.

An equality and diversity network (EDN), has been set up by public sector organisations in Ireland (public service organisations, telecommunications, state companies, banks, transport, health service etc.) to provide an opportunity to share experiences and network with other equality officers and human resources personnel. The presence of such a network has been very useful at national level in promoting equality and diversity in Ireland.

### *Enel*

Enel established an Equal Opportunities Committee in 1989. It was the first committee of its kind in Italy that was established Italian legislation, which required companies to establish such committees. The Committee helped to improve the profile of the company and has sent an important message to potential and existing women employees that the company is serious about equal opportunities. Also, the backing under the legislation has given added weight and value to equal opportunities in the company.

The Committee has the objective to bring together representatives of the company and trade unions to advise the company and keep up momentum in equality and diversity. There are two representatives from each of the three company trade unions. The Committee makes proposals to the company about equality policies and procedures and oversees the implementation of equality policies. A major objective of the Committee is to ensure that legislation is implemented in areas such as flexible working hours, work-life balance, professional training, maternity leave and parental leave. For example, in 2006 the Committee oversaw the implementation of the new legislation on parental leave and produced a booklet for staff outlining their rights under the EU Parental Leave Directive. The committee has also carried out a staff survey on work-life balance and new policies have been introduced to enable women to reconcile work and family life more effectively.

Other initiatives have included plans for establishing childcare facilities for staff with children, the provision of a 'pink' parking space for pregnant women so that they can be guaranteed a place to park. The Committee has also initiated and overseen various projects in areas such as work-life balance and leadership training for women. It has been instrumental in ensuring that equality is mainstreamed into collective agreements. Initially, an equal opportunities statement was agreed by the Committee in the form of a protocol, which the company was not required to implement. However, the collective agreements of 2001 and 2006 have included a mandatory clause on equal opportunities. In the future, it is planned that there will be a nominated person with responsibilities for equal opportunities and an equal opportunities committee in each region. It is envisaged that this will enable the national committee to be more responsive to the regions.

Enel is part of a national Equal Opportunities advisers network and has representation on regional statutory equal opportunities councils, which are coordinated by the Ministry of Labour. This has enabled Enel to keep up to date with legislative developments as well as learn from other sectors through the exchange of practical experiences.

## Section 3: Creating a supportive workplace equality and diversity culture

### Introduction

The aim of this section of the Toolkit is to give practical suggestions, tips and guidelines about how a workplace culture can be created to support equality and diversity. There is wide agreement that women represent a valuable resource and pool of talent in the electricity sector. Recruiting and retaining valued women workers means having good employment practices that integrate equality and diversity and establish an “employer of choice” focus to the organisations.

In this section we look at a number of key ways in which electricity companies can create a supportive workplace culture:

- a) An equality and diversity work culture that supports equality and diversity
- b) Equality and diversity at work training
- c) Senior management and senior champions who can shift traditional perceptions about gender balance and champion changes in the organisation
- d) Supporting women into leadership positions and positions where they are under-represented
- e) Mentoring, buddy and other support systems
- f) Support and visibility for women in senior positions
- g) Attracting a diversity of employees
- h) Integrating equality and diversity into your customer service
- i) Ensuring that gender equality issues are integrated into collective bargaining and partnership working between trade unions and employers

#### **a) An equality and diversity work culture**

Changing the culture of work is important to implementing equality and diversity, to improving gender balance and to opening up possibilities for women to work in non-traditional areas. Many companies are identifying how the presence of women in under-represented areas can help to change the business and customer focus. One way of setting about this is to ask women and men in the company what would be conducive to creating a positive working environment.

#### *Statkraft*

The company believes that this approach has resulted in a company with a work culture that is respectful and accommodating of diversity, which in turn has contributed to the creation of a positive image of the company. An annual university graduate study in Norway shows that Statkraft has become a preferred employer (ranking 28 out of 120 companies in 2005 compared to 81 out of 120 companies in 2001). A gradual increase in the number of women employees and managers in the last decade has contributed to a positive culture and image.

A change in work culture can make your workplaces more welcoming to women and other non-traditional trainees and employees. In order to do this, some companies have implemented a culture change programme to encourage the recruitment and retention of skilled women.

The following are some examples of workplace actions that can help to create a supportive organisational culture:

- Equality and diversity are integrated into business practices. This includes having systems in place to measure the achievement of goals, evaluate progress and assess implementation of policies.
- Support systems are in place to enable all staff to take up professional development and career development.
- Structures exist to ensure that the potential of all staff can be maximised. This includes a focus on the progression and development of women, including career development and career advice sessions for all staff.
- Systems are put in place for equality benchmarking and the development of equality and diversity in quality standards or accreditation systems.
- Employees have access to affordable childcare provision and/or support with childcare or other care arrangements.
- Opportunities to work flexibly exist without losing seniority and career progression.
- Measures are in place to support partnership at work between unions and managers in areas such as positive forms of flexibility and innovative approaches to working time. For employers of older workers, working flexibly can be a way to retain staff and harness their skills and experience.
- There is an emphasis on people skills and customer service in non-traditional areas in order to promote positive aspects of non-traditional jobs and the added benefit of women's skills and potential.
- Positive images exist of women inside and outside the organisation, for example, in roles such as engineer, technical, senior executive and Board member.

Employers and unions have important roles to play, and much to gain, in assisting women and men to access jobs in sectors where they are currently under-represented and to acquire skills and qualifications in those sectors. In this respect, reducing occupational segregation in the workplace is not just important for equality, but is also an important business and competitiveness issue.

### **UK Skills Alliance: creating an organisational culture that is proactive in equality**

In the UK, a Skills Alliance, set up by leading employers and trade unions, training organisations and small business organisations, has examined the impact of occupational segregation not just as an equality issue but also as a business and productivity issue.

Suggestions include:

- Offering at least one non-traditional work experience placement.
- Train, recruit, retain and re-skill women in non-traditional sectors.
- Attract a wider diversity of applicants for training and employment through better links with schools and colleges, information, role modelling, taster days and placements.
- Identify the business case for equality in contributing to a competitive and productive workforce
- Awareness raising and debate to challenge and change the negative.
- Examine attitudes of some employers, especially those in male-dominated sectors, towards women's potential contribution and their ability to do certain jobs, such as those that involve lifting and physical work.
- Interview at least one female applicant who meets the selection criteria.
- In-house retraining programmes for employees who wish to switch to a non-traditional role within the organisation.
- Use adult apprenticeships to help women retrain in non-traditional work.
- Establish best practice through flexible working hours.
- Model and disseminate best practice in diversity policies, recruitment and training among employers.
- Unions can play an active part in improving workplace culture for non-traditional trainees and workers, including ensuring that union and learning representatives provide practical and mentoring support.

### *ESB*

A recent equality audit recommended a mainstreaming approach for equality and diversity so that each business line would include equality and diversity in their business planning process. At present a senior manager, usually the HR manager has specific responsibility for equality and diversity in their business lines and they produce annual action plans. These action plans and progress reports are presented to the HR Director. There is considerable flexibility on what should be included in the plans and this is at the discretion of the businesses. Guidance is provided by the company's Equality Office and from the HR corporate office. According to Freida Murray, the ESB's Equality Manager "This ownership at business level is a very important aspect of the whole mainstreaming process; and it means that equality and diversity is not just seen as a corporate level initiative. Because it is now part of their business planning process, it forces the business line to look at what is happening in their own areas and makes them then examine how they can develop initiatives that will work for them"

There is currently a focus on providing a supportive work culture for women by a formalised system of networking. These networking events bring women at senior level together to discuss a number of themes and issues, around their development and progress in ESB. Any matter that requires action will be raised if necessary with the Director of HR. Staff is supported through an extensive programme of training and development, including 50 full time scholarships for full-time release (with full salary and fees paid) for a third level qualification. A new initiative to target the employment of people with disabilities has been introduced and in 2006 eleven people with disabilities were employed on a traineeship programme for a six months period.

### **b) Equality and diversity at work - training for staff and managers**

Training can be an effective way to change organisational culture, raise awareness and change perceptions. Providing equality and diversity training in the workplace is important if employers and employees are to understand the role of policies and practices that are designed to promote

equality and accommodate diversity. This also requires an understanding of the barriers and behaviours within the organisation to the promotion and accommodation of diversity, and what needs to be done to achieve an inclusive working environment.

Many organisations provide training for staff throughout the whole organisation and integrate equality and diversity into induction training, customer service training and other business development training and development.

#### **Checklist of issues to cover in equality and diversity training**

- Address the barriers in the workplace that prevent the achievement of equality and diversity.
- Introduce concepts of equality and diversity, including the business case for equality and diversity.
- Discuss how behaviour is influenced by attitudes, how negative stereotypes can reinforce discrimination and how inappropriate stereotypes can have negative impacts for organisations.
- Show how putting in place smart working practices can enhance equality and diversity outcomes.
- Identify what works and good practices for similar organisations that can contribute to equality and diversity.
- Provide concrete information about the steps that can be taken to introducing and implementing an equality policy in the workplace, how staff can be informed and involved and how policies can be monitored.

#### **c) Senior management and senior champions on equality**

An important part of achieving gender balance will be to ensure that there are senior champions and a corporate culture on equality and diversity that is driven from the top. Encouraging senior managers to become equality and diversity champions can help to shift traditional perceptions about gender roles, which in turn can help to champion changes in the organisation and culture of work.

For example, senior managers and executives can:

- Show visible commitment and support by endorsing and launching equality initiatives and giving a visible commitment to a framework of actions to improve gender balance and accommodate diversity.
- Develop a strategy to ensure that women are represented in greater numbers at senior management and board levels (this can be achieved by setting a timeframe for achieving improved gender balance in proportion to the numbers of women in the company or through a quota).
- Improve data so that there is a clear picture of the representation of women in all areas of the organisation and where they are currently under-represented, at least in proportion to their overall numbers.



### *ESB*

A Management Diversity Advisory Group was set up two years ago by the HR Director and includes two members of ESB Executive team and other senior managers. The group is an important resource to the director in terms of championing equality and diversity and giving it a high profile. This has helped to highlight the importance of having a better gender balance at senior level and has been active in supporting initiatives to remove barriers to progression.

Networking events for senior women are organised twice a year and actively supported by this Group. The company recognised the fact that women have fewer opportunities to network with each other and can often feel isolated in a male dominated work area. Expert speakers are invited to address the group and the first event was addressed by the CEO. Issues which arise at the networking event would be relayed back to the Executive if necessary. In time it is hoped that this model of networking for all women will cascade down to each of the business lines so that there is networking throughout the organisation.

### *Vattenfall*

An international network for female managers from Finland, Germany, Poland and Sweden meets twice a year. The network seeks to identify women managers and increase the visibility of women. The company attaches significant importance to the network and it was formally opened by the CEO. At least one member of the Executive Group attends the network meetings. The network meetings take different themes with invited speakers and experts in areas such as gender equality, strategy development etc.

## **d) Support women into senior and leadership positions and positions where they are under-represented**

There are a number of ways by which women can be supported into taking senior and leadership positions and positions where they are under-represented.

### **Checklist of issues to consider in supporting women into senior and non-traditional positions**

- Encourage women and other under-represented groups to apply for promotion to improve their representation among senior management.
- Career development and management training and development programmes for women and men who have identified potential. Consider putting in place targets to ensure that there is gender balance in these programmes.
- Specific targeted programmes for women, including assertiveness training and confidence building, support in job application and interview skills.
- A more systematic approach to mapping career paths and progression through annual career progression interviews, training needs assessments and individual plans.
- Development of women's networks to provide support for and overcome isolation experienced by some women managers.

### *Energie E2, Denmark*

Women make up around 18% of the workforce of E2 and 8% of managers. There are two female senior managers and 30 male managers, and there are no women representatives on the company's Board. One of the difficulties that the company faces is that, although there has been an increase of women entering engineering, their numbers remain very small. One way that the company has approached this deficit is to give presentations to business and engineering schools and to make contact with women's organisations in order to encourage women engineers to apply for positions in the company. This has begun to have a positive impact.

**Erika Appelgren, Vice-President for the Business Unit Nordic Distributions Network, Vattenfall, Sweden**

Erika is a Chemical Engineer in a senior position in Vattenfall. She says: “I enjoy being in a position in which I am able to actually influence things. I also enjoy interacting with a lot of people and driving change processes. I don’t think I have any special difficulties being a woman in my position. However, as a lone woman you have to be aware that you are always very visible - which mostly is a positive thing, but sometimes can be a disadvantage.”

She has worked for the company in two periods since 1982. Her current position is Vice-President for the Business Unit Nordic Distributions Network, Operations Sweden. She has worked in a number of non-traditional positions and when she became Vice-President for Eldistribution AB in 2003, she got responsibility for the operation of the Swedish part of the Vattenfall electricity distribution system, with responsibility for 180 employees, in five cities. She has previously worked as a manager in a number of business areas within the Vattenfall Group and was a member of the management board of Göteborgs Gatugruv AB with responsibility for the consultancy division working with civil service planning and construction. Prior to that she worked as a safety engineer and research engineer, and in project management and strategic planning. In addition to her main work responsibilities, she has been a member of the Board of five Swedish energy companies that are fully or part owned by Vattenfall. Since 2004 she has been a member of the Board in two Swedish energy companies. She has also been an instructor in Vattenfall’s seminars for the development of young managers and a mentor for young managers in mentoring programmes within as well as outside the Vattenfall Group.

Erika believes that “it is important to support women in management programmes because there are many women who have the potential but need the reassurance that it is feasible and possible to combine with family life. The work-life balance problem is, of course, true for most young persons but, in my experience, the women tend to hesitate more and the role models are still too few.” Erika says that, in her experience, having a supportive culture in the organisation is important. “During most of my time I have had the good fortune to work for managers who were actively supportive and gave me chances to try new jobs/new positions. Today Vattenfall also has a very good management planning programme.” Erika says that, in the future, the electricity sector will change as the workforce changes. Currently there is an older male workforce who will retire soon; this will open up spaces for a lot of interesting jobs for women.

**e) Mentoring, buddy and other support systems**

Implementing a mentoring or buddy scheme to support trainees and employees can help to break down isolation. Mentoring schemes can help female staff members to talk about any issues they are facing. Where possible, allocate a mentor of the same gender. If mentors are not available, for example, for women in senior positions seek external mentors.

**Checklist of issues to consider in setting up support systems**

- Ensure managers have the interpersonal and coaching skills they need to identify and meet the support needs of apprentices from non-traditional backgrounds. This can be achieved by running equality and diversity training for managers that challenge stereotypes and attitudinal barriers, as well as highlighting the business case for equality and diversity.
- Consider setting up a buddy system to help women employees to work together on jobs where possible.
- Establish a diversity network to ensure that women or other non-traditional trainees have regular contact with colleagues in a similar position.
- A women’s network, support team or group can be put in place for women managers or trainees who may experience isolation in male-dominated workplaces.

### *Enel*

Under Italian law all companies are required to report annually on the representation of women. (Law No 125 requires that companies collate data on company personnel by gender and present a report every two years). The Enel Annual Sustainability Report highlights the progress made in achieving equal opportunities with a breakdown of female employees in executive, supervisory, white-collar and blue-collar positions. The annual report also covers other initiatives that have been put in place to progress equality of opportunity in areas such as work-life balance and human resources policies.

Enel's current staffing levels are approximately 60,000, the lowest level in the company's history. However, women have become a larger share of the workforce than in the past, with more women working in non-traditional and senior positions. In 1990 women were around 9% of the workforce, by 2005 this had risen to 15% (which is equivalent to the average European percentage). The number of supervisors has grown significantly from 3.5% in 1990 to 16.5% in 2005, whereas the number of women executives has grown from 3% in 1990 to 8% in 2005.

The company recruits around 100 new graduates each year of whom around 70% are engineers; of these there are only between six and 10 women who go into engineering each year. In order to redress this balance, the company has put in place positive actions to recruit more women engineers. Larger numbers of women have taken positions in white-collar work in corporate and marketing divisions, with smaller numbers in infrastructure and generation. For example, the generation area has been a difficult area for women to break through. The company recently appointed a young woman to the position of Executive Assistant. This was seen as a breakthrough in the company and particularly in recognising the value of getting young, bright women into senior positions in the company.

Enel has introduced a leadership training programme for women. A mentoring programme has been established for the exchange of experiences of women and men that takes place at different levels and regions, and between different companies. A training programme has also enabled men and women to be more aware of different managerial models and to reflect on experiences and future plans. A particular emphasis has been placed on recognising the skills and abilities of women and for the company to show sensitivity towards women employees. These factors have been important in giving women an incentive to progress through the company and put themselves forward for promotions.

### *Vattenfall*

Leadership development is a key element of the management planning process, including the identification of female candidates and young potential executives, the provision of management development programmes, trainee programmes and other measures such as coaching and mentoring. Other objectives have been to implement a more transparent and equality driven recruitment process through the monitoring of newly recruited employees and the recruitment process as regards diversity through advertisements, channels and selection criteria.

Vattenfall offers female managers at the beginning of their professional careers is the possibility of participating in mentoring programmes. This could be as part of ordinary management programmes, such as the Vattenfall advanced management programme (VAMP), or in mentoring programmes. The programmes are for women and men. The company's experience is that this is the best way to develop and expand the consciousness of female and male mentees and mentors. In both programmes, discussion takes place on diversity related issues and company culture. The impact on company culture has resulted from a focus on work-related rather than operational issues, particularly in areas such as work-life balance.

## **f) Develop support and visibility for women in senior positions**

Women managers may need to feel that they are valued and supported, whilst giving visibility for women in senior positions is important to establishing female role models.

The following checklist gives some examples of what can be done to give support and visibility to women in senior positions:

### **Checklist: measures to support the visibility of women in senior positions**

- Present positive images of women in senior positions, for example, in company reports and publicity.
- Show senior level commitment to women at senior levels.
- Identify and support women who have potential for leadership positions.
- Provide professional coaching for women with potential to enable them to realise their goals and to support them through the process of applying for senior positions.
- Consult with women managers to identify what barriers exist and develop policies and procedures to address these problems.
- Develop women managers' networks to enable women to share experiences, identify goals and gain experience.

### **Examples of measure to improve the representation of women in senior levels**

#### *Statkraft*

In 2005 women represented around 21% of employees in Statkraft. The number of women managers has been growing in recent years; with women currently representing 19.8% of managers (this figure is lower in the whole of the Corporate Statkraft, including daughter companies, where women are 16% of managers. At senior management level women have made recent inroads: two out of the seven members of the Statkraft group senior management team are women (29%) and four out of the nine company Board members are women (44%). There are three trade union representatives on the Board, and at least one of these has to be a woman.

One of the company's broad objectives is to increase the number of female employees and women managers. This objective is shared by unions, the management of the company and the Board. The company's objective is to recruit women managers at least in proportion to the overall representation of women in the workforce (currently 21%) in order to have a 'diversity of competences'. This fits with the company's business principles, one of which is competence building. Statkraft has a commitment to valuing and building all of its employees. In addition, the company wants to improve the gender balance on the boards of subsidiaries in companies in which Statkraft has a substantial shareholding. It has done this by:

- Developing policies that promote equal treatment in recruitment, hiring and personnel policies by presenting positive images of women in their publicity, advertising and company brochures and newsletters, and the introduction of measures to provide an encouraging environment for women to progress through internships, traineeships and management training.
- An internship system has been put in place with an objective of recruiting 50/50 women and men. This has the effect of enabling the company to work with young people on the basis that it helps to bring new energy and talents into the company.
- A Statkraft traineeship is targeted to attract around 10 new graduates each year. The objective of the programme is that it will recruit 50/50 women.
- A one-year management training programme – NEXT – has specifically encouraged potential women managers through a process of identifying future leaders. There has been no problem with women coming forward for the programme and, in 2005, 18 employees completed the programme, of whom 44% were women. The programme has had a positive impact in identifying and encouraging new women managers and provides training and understanding around specific management, person and social development.

### *Vattenfall*

In Vattenfall there is a strategic objective to recruit more women into senior positions. The company wants to have female managers appointed in the same proportion as female employees. All business units are required to implement this policy on equal opportunities. They are required to report annually and contribute to annual planning and development. The number of female employees and managers has been gradually growing. In 1986, 20% of employees and 5% of managers were women. By 2005, this had risen to 25% of staff and 18% of managers. There is one woman and 10 men in the Executive Management Group (10% women, 90% men), and two women and 12 men sit on the Board of the company (11% women, 89% men).

A *young graduate scheme* has been running for two years and aims to provide temporary employment 'traineeships' to young graduates. This not only gives them a foot in the labour market but also gives Vattenfall access to new knowledge and ideas. A commitment has been made to ensure that there is 50/50 representation of women and men. In 2005, 23 women participated in the project out of a total of 45 people, 37 of whom gained continued employment with Vattenfall.

### **g) Attracting a diversity of employees**

Many companies are having to find new ways of attracting a wider diversity of employees.

#### **Checklist of issues to consider in attracting a diversity of employees**

- Provide information and raise awareness about working in the electricity industry, with a particular focus on giving information to girls and women.
- Present a diversity of individuals in marketing material, advertising and publicity. For example, use women engineers as positive role models in marketing and publicity materials.
- Find ways of enhancing the interest among under-represented groups in schools and colleges, for example, by giving presentations in schools and colleges and at careers fairs.
- Work with employment agencies, universities, schools and careers offices in informing young people of career opportunities, whilst emphasising that the company welcomes applications from a wide diversity of people.
- Hold recruitment days and outreach activities. This can be carried out in partnership with local communities organisations and women's organisations.
- Offer taster sessions or work experience for young people. This can include practical and hands-on activities for under-represented groups, which can help to build confidence for trying out new skills and can also change attitudes to non-traditional employment.
- Ask existing trainees and apprentices what they think can be done to attract a wider diversity of employees.

### *Statkraft*

Statkraft is increasingly opening its doors to a wider and more diverse pool of potential employees. In particular, its international expansion and a government requirement to encourage recruitment and integration of minority ethnic groups, which include 1<sup>st</sup>, 2<sup>nd</sup> and 3<sup>rd</sup> generation migrants, has resulted in a number of diversity initiatives, including inclusive advertising and measures to support minority ethnic groups working in the company. The company is required to report to the government on its progress in integrating immigrants into the workforce.

### *Empower Training Limited*

Empower is a vocational training organisation based in the UK that provides training to the energy sector. It has developed a number of initiatives and training modules on equality and diversity, and has played a role in helping to encourage more girls and women into non-traditional roles. Activities include the hosting of girls-

only career days and tasters that aim to show girls the different types of careers available at all levels, from apprenticeships to graduates. Empower also runs a schools engagement programme aimed at 12-14 year olds. This is a six-week programme that aims to enthuse young people about engineering and the electricity sector. It is run with a local professional football club and has proved very popular with girls and boys.

*British Gas Engineering*

British Gas Engineering Academy has identified schools, parents and other opinion formers as key targets for awareness raising through its Equality and Diversity Strategy. A four-person education team has been appointed (three women and one man) to spearhead this work. Their specific target is pupils at around Year 9, i.e. when subject options and careers issues are being discussed. This is longer-term investment to encourage young people to consider engineering seriously (and, within that, the gas industry). British Gas also raises equality and diversity issues with teachers to ensure that schools sessions encourage girls to participate.

## **h) Integrate equality and diversity into your customer service**

Employing women or other under-represented groups in front line services can help to improve customer relations for the company, particularly older people and single women. This is good for corporate image.

*Vattenfall*

The company believes that the workforce should be more representative of its customer base. In Vattenfall's customer service centre in Berlin, Germany, staff has been recruited with knowledge of the languages and cultures required to give customers from a diversity of backgrounds a good service.

### **Checklist of issues to consider in mainstreaming equality and diversity into customer service**

- Assess customer services, including the services provided to women, disabled, ethnic minority or older customers.
- Check if services that you provide meet the needs of a diverse customer base.
- Ensure that front-line staff is supported so that they can accommodate equality and diversity.

## **i) Engendering social partnership**

Unions can play a more proactive role in helping to promote equality and gender balance. Finding joint solutions can result in a win-win for the company and for staff.

### **Checklist of issues to consider when developing a social partnership approach**

- Inform unions and raise awareness in unions of union equality policies and those of their confederations.
- Ensure that women are represented on the union decision-making bodies, particularly where there are discussions about major change programmes, changes in shift patterns and the organisation of work.
- Unions and management could examine the EU's 2005 Community Framework Strategy on Gender Equality, agreed by the European social partners. Specific actions could be developed under four broad headings: addressing gender roles; promoting women in decision-making; supporting work-life balance; and tackling the gender pay gap.
- Provide equality training for union officials in order to highlight how existing structures, policies or workplace union representation can be further developed to support women.

**A more detailed section on the role of social partnership can be found in Section 5.**

**Astri Botten Larsen, Engineer and employee representative on Statkraft Board, Norway**

Astri is an employee representative on the Statkraft board in Norway. She is one of three elected representatives on the Board. She is a Senior Engineer based in Statkraft Energie, where she has responsibility for the management of power plants. This is an area of traditional male employment and women represent 18% of those working in this part of the company. Astri has two children and she has been able to successfully combine work and family life, although she recognises that being out of the labour market for maternity leave can disadvantage career progression, at least in the short term. She is aware of the competitive environment in the energy sector and the impact that this is having on the intensity and pressures of work.

Astri was nominated by her trade union Tekna, a union organising engineers, to represent staff on the Board. This is one of three trade unions (the others are EI &IT and NITO) that work closely together in a joint council. The unions meet at least twice a year with the Senior Management Team of the company and they are responsible for agreeing company level agreements on key areas such as pay and working conditions. Astri believes that women play an important role as union representatives, particularly because many unions are male dominated and women can bring a different perspective. She says that women in the company today take it for granted that there will be equal opportunities.





## Section 4: Work-life balance and flexible working hours

### Introduction

Achieving a balance between work and other family or personal commitments is often at the top of employees' priorities. It can be the key factor in retaining staff, achieving company goals and having a productive, motivated and satisfied staff. Flexible working arrangements are important to enhancing women's access to employment at all levels (including senior management) whilst also providing more opportunities and a work culture that responds to men's aspirations to spend more time with their families.

Companies that have a flexible approach to working hours often have fewer staff taking sick leave and a more skilled and committed workforce, and thereby improve their productivity and competitiveness. There is substantial evidence from companies and employee surveys across Europe to show that work-life balance, and in particular balancing family and work responsibilities, are key objectives of a significant number of employees. Creating a culture of work-life balance requires that organisations take a positive approach to flexible working.

#### a) What are the benefits to employers and employees?

For **employers**, flexible working helps to make better use of resources and of the existing workforce:

- Introducing change through flexible working can have a positive impact on your service delivery and competitiveness.
- If employees feel valued they will be more motivated and there will be a less stressful work environment, with lower rates of absenteeism and sickness, and increases in productivity.
- Attracting a wider pool of candidates for new posts can be achieved by offering a range of flexible hours options, such as part-time, job-sharing, term-time working etc. This can help to create a reputation as employer of first choice.
- Providing better flexible working provisions than your competitors can result in a competitive advantage because you can recruit and retain the best staff – particularly valued female employees.
- Flexible working provisions can save you time and resources in recruiting and training new staff, particularly women who remain with the company after maternity leave.
- Companies can use flexible working hours to extend their times of operation and thereby make best use of their equipment and extend opening times to customers.
- Absences can be managed more effectively which can help to reduce absenteeism, especially when parents have to take time off to care for sick children.
- Where staff work part-time or in job-sharing positions the company can benefit from the experience and skills of two people, whilst also providing for better cover during holiday or peak times of operation.

For **employees**, flexible working can improve choice and control of working time and working lives. Working together to agree flexible working hours arrangements can result in better relations between management and staff, improved self-esteem, health and confidence, loyalty and commitment, job satisfaction and a better working environment. Employees who gain work-life balance have reduced stress and work pressure.

**Chris McElhinney, Manager, ESB, Ireland**

Chris McElhinney works for ESB in Ireland. When her four children started school she found it increasingly difficult to combine her finance role and family life. As a result she requested reduced hours, working 5 days a week day until 2 p.m. This enabled her to manage her work commitments as she was in each day and also allowed her to spend time with her children.

She accepts that some managers can find the transition to reduced hours by members of their senior management team difficult but stresses that she has been lucky with support from the executive in ESB. Each role she has taken on since moving to reduced hours had previously been carried out on a full time basis and she accepts that this has proven difficult at times, particularly in terms of time available for networking etc. She considers the organisation accepts the necessity to retain staff with key skills particularly at times when, from a personal point of view, there may be significant demands on their time. She believes that ESB is making this shift and, as more senior managers avail of flexible working (especially men) the organisation will see the benefits. Work life balance is no longer an issue for women alone, nor indeed for individuals with children and ESB is trying to develop policy and practice to facilitate various groups.

In addition, companies that are supportive towards the childcare needs of their employees are good at retaining their staff. Providing a workplace crèche can be costly, but a valuable thing to do in attracting women. However, consider providing a childcare coordinator in your workplace who can assist in finding childcare places and in developing solutions in the local community.

**Facts about flexible working**

- A Europe-wide survey of working conditions published in 2000 found a significant increase in the intensity of work over the past 10 years. More than half of workers stated that they were working at high speed and to tight deadlines during one-quarter of their working time. (European Foundation, 2000)
- 94% of employers believe that people work best when they can balance work with the rest of their lives (DTI, 2003). 71% of employers who operate flexible working report that its provision has had a positive impact on management-employee relations, employee motivation and commitment and labour turnover. (DTI, 2003)

**b) What can be done to implement work-life balance?**

Creating a culture of work-life balance requires organisations to be proactive, creative and innovative in balancing the needs and preferences of employees with those of the organisation. It is very important that managers, particularly senior managers, believe in the benefits of good work-life balance. If they do, they will encourage and implement it.

Some suggestions about how to go about this are:

- Lead by example and make sure that there are champions at the senior level who give a visible message of support, including tackling long working hours by working smartly.
- Provide training and support to managers so that they can effectively manage flexible working hours and come up with solutions to work-life balance.
- Carry out a survey of staff to find out what their working time preferences are. You can follow this up with focus groups and meetings with staff to examine what are the best arrangements to meet the needs of staff and the needs of the company.

For managers who are managing flexible working hours:

- Be open-minded and explore all possibilities. In some cases, flexible working hours may mean reduced hours, whilst in others it may be that working time can be rearranged to meet the needs of the employee.
- Think about how the job can be carried out rather than the number of hours that are worked. Include measures that are performance-based, based on results and outcomes rather than on hours worked or presence in the workplace alone.
- If you are unsure about how the arrangement will work, try it out for a short period of time before committing to a permanent arrangement.
- Examine and discuss the impact of flexible working with your team and, through discussion, find the best arrangements.
- By offering flexible working hours to everyone, you can help to make everyone feel valued and let people that are working full-time know that this is an option for them in the future if their circumstances change. This can also help to change culture by sending the message that flexible working is positively encouraged.
- Include staff working flexibly in training, professional development and team meetings. Do not assume that if someone works flexibly or part-time that they are any less committed to their work.

### c) The role of the social partners

Partnership working between management and unions can help organisations to implement and develop a culture and practice of equality and diversity and work-life balance. Partnership working requires there to be a shared commitment to the objectives, goals and success of the organisations. A key outcome of partnership working is the achievement of joint solutions through joint discussions, projects and initiatives. One way of taking these issues forward is to establish a partnership group made up of union representatives, staff and managers.

- Promote partnership and explore how working in partnership between unions, staff and managers can promote shared solutions. This can help to create an organisational style of discussion rather than negotiation.
- Taking time to consult with managers, employees and trade unions can achieve commitment to changing patterns of work and the smooth introduction of changes.

#### **What are the working time options available to employees?**

There are a large number of different working time options available to staff. The most commonly used flexible working time arrangements are described below.

*Working hours/ the number of hours worked:* Full-time, part-time, job-share, term-time working, flexible retirement and overtime.

*Working hours/ when people work:* Flexi-time, compressed hours, annualised hours, shifts and shift swapping, self-rostering, extra hours and time banks.

*Working hours/ where people work:* on employers' premises, tele-working, working from home.

*Leave arrangements:* short and long leave (paid and unpaid), career breaks, holiday leave, maternity and parental leave, family and carers leave.

*Other work-life balance arrangements:* child and elder care, health, fitness and sports facilities, lifelong learning, personal development and training.

#### **d) Developing a Work-Life Balance Policy**

A work-life balance policy can be useful in establishing clear rules and entitlements, whilst also showing that the organisation has a visible commitment to work-life balance that can help with the recruitment of staff. It is important to agree the policy with unions and staff as this is an area that has a direct impact on the working lives of staff.

Suggestions of what to include in a work-life balance policy:

- Identify the scope of flexible working. For example, if all employees have the right to work flexibly, is the organisation able to put this into practice. In most cases, policies on work-life balance state that requests for flexible working will be accommodated as long as they do not adversely affect the needs of services. (In some countries, notably the UK, Germany and the Netherlands there is a right to request changes in working hours).
- Set out the flexible working options that are available to staff and provide brief information about entitlements, for example, how much time can be carried over in flexi-time systems, how much time can be banked in a time bank at any one time, or how many daily hours can be worked in a compressed working week. It will be important to set these entitlements within the framework of legislation on working time.
- Make reference to equal opportunities in the policy. This can include specific points regarding flexible working time, for example, for older workers, disabled workers, parents and carers.
- Consult widely with staff teams and unions and ensure they are fully involved in the drawing up of the policy.
- Ensure that the policy is widely disseminated to all staff. A staff handbook or booklet that sets out the policy and options available to staff is a good idea.

**See a model flexible work-life balance policy in Appendix 5.**

#### **e) Consulting with staff**

Consulting with staff can be a very effective way of finding out how staff view the organisation and what their needs and perspectives are. This can be carried out through a variety of methods including:

- Staff surveys, with the analysis of results fed back to unions, staff and managers
- Focus groups held with groups of staff to gain insights into attitudes, understandings and perceptions that may not be possible through a survey or on a one-to-one basis. A group can help to generate discussion and a variety of views and perceptions
- Staff seminars or discussion groups, for example, during a lunch time with a visiting speaker to stimulate discussion.

### Checklist of issues to consider in carrying out a work-life balance survey in your company

- What are current working hours (full-time, part-time etc.)?
- Do employees have opportunities to work flexibly and, if so, in what way?
- On average, what are normal working hours? Do employees regularly work over these hours? Do meetings extend over normal working times, thereby making it difficult for parents?
- What work-life balance options would employees like to avail of (e.g. flexi-time, term-time working, shorter working hours, longer working hours, working from home etc)?
- If employees change their working patterns, how would the new work arrangement affect colleagues and service provision?
- What would be the main purpose of a change in working hours (e.g. spend more time with family, leisure, hobbies, personal developing and training, improve health and well-being, participate in political or community work etc.)?
- What is the employee's satisfaction with current work-life balance?
- What are the main causes of imbalance in work and family life (e.g. long working hours, work pressures, caring responsibilities, stress at home etc)?
- What could employers do to improve employee work-life balance?

#### *Statkraft*

*Statkraft* offers a system of flexi-time and a possibility to bank hours for up to three months. A positive approach to supporting working parents through parental leave and flexible work arrangements, such as working from home, have been important factors enabling women to combine work and family life. Managers take a flexible approach based on trust and recognition that there are times when the company can support parents. In Norway there is a statutory entitlement to 42 weeks parental leave on full pay and a further 10 weeks on 80% pay that can be shared by both parents. In addition, a further 10 days a year can be taken by each parent up to a child's 10th birthday.

A concern about an ageing workforce and the need to retain the best staff has prompted the company to address age-related diversity. An innovative life-course policy for employees aged 62 years and over has been introduced with the objective of providing greater flexibility and the opportunity for older workers to reduce working hours on a phased basis and gain additional paid leave without a major impact on pay. It works by enabling workers at the age of 62 to reduce their working time by 10%, at the age of 63 by 20%, at the age of 64 by 30% and at the age of 65 by 40%. This enables the company to retain older workers (who in the past used to leave the company at the age of 62) whilst giving older workers more choices of working for a longer period of time on reduced hours.

#### *Enel*

A staff survey was disseminated through the company newspaper and online survey. There were 830 respondents, 57% of whom were women. A key outcome from the survey was that new company strategies were put in place for managing working time. The company has recognised that there is a business case for introducing flexible working hours. Enel has stated that it does not want women to be disadvantaged by working shorter hours. Although part-time work is regulated under the law and collective agreements, the major problem has been in ensuring that managers are fully equipped to deal with requests for part-time work or reduced hours. A key issue has been ensuring that part-time work is available for managers and professional staff. Across the company, 2.4% of employees are women working part-time, compared to 0.3% of male employees.

One example is of a woman supervisor who works full-time who wanted to reduce her working hours by working from 9.00 – 3.00. She agreed with her manager that she would organise her work and meetings within those times and her colleagues have adjusted so that meetings are only held in the mornings. Her work has not suffered and the company has benefited from this arrangement by retaining the member of staff and providing her with improved work-life balance.

Enel has produced a handbook on family leave that provides information about the opportunities that the law and the Company make available to working parents. In the case of maternity provision, Enel employees who are covered by the national collective labour contract for workers in the electricity industry receive enhanced financial benefits (with maternity pay of 100% of salary compared to 80% of salary provided under the law, and enhanced benefits for six months following statutory maternity leave).

Equality and diversity have been progressed through a programme of People Care, which was created in 2005. A survey of staff priorities and needs showed that women staff particularly benefited from initiatives to improve the balance between professional and private life, the introduction of flexi-time, subsidies for the use of public transport, and measures to improve opportunities for mobility between the different company locations. A second phase has resulted in focus groups with staff in regional offices across the country, with the objective of mapping staff needs. The main issues identified were transport to and from work, and childcare. The company is drawing up an operational plan to identify ways of resolving these issues for staff through a further extension of flexible working hours, for example, by the introduction of a time bank.

#### *ESB*

Flexible working arrangements are part of the company's Equal Opportunities Policy on the basis that flexibility in the workplace enables people to combine their work with family life and other commitments and thus assist them in reaching their full potential as valued employees. An external review of equality in ESB in 2002 found that the majority of employees rated ESB as one of the best companies to work for in Ireland, particularly because of the opportunities to gain work-life balance.

As part of this policy, the company's Joint Equality Council (JEC) with representatives of both ESB Group of Unions and Management meet to assist with the development of such policies and advises on practices within the company. The company has a wide variety of work life balance policies in place including flexitime, additional maternity leave provisions to statutory entitlement, with five months unpaid leave, during which time there is a continuation of employee's superannuation contribution for the period of the additional maternity leave, thus ensuring no break in service occurs. Other flexible working hours provisions include job sharing, reduced working hours, career breaks, the provision of a workplace crèche accommodating over 65 children, education support and learning centres. A new work-life balance initiative has been introduced called *Life Balance Time* which is ESB's answer to term-time working. The advantage is that it appeals to all staff and not just those with children, and it allows a staff member, to take up to 20 weeks unpaid leave in a year, once certain conditions are met and appropriate notice given. The reduced pay is spread out over the year in which the leave is taken.

## Section 5: Equality tools

### Introduction

This section presents some practical equality tools that are designed to help accommodate and manage equality and diversity at work

These are as follows:

- a) Equality reviews and audits
- b) Equality and diversity monitoring and data collection
- c) Equality mainstreaming, including how to equality proof procedures, policies and activities

### a) Equality reviews and action plans

In the electricity industry, as in other sectors of the economy, gender equality plans are becoming more commonplace. In practice, these tend to be introduced in the electricity sector where there is national legislation in place requiring workplace gender equality plans, for example, in Sweden, Finland, France and Belgium. In some countries, they are included as part of collective bargaining at company level and union involvement is normally a requirement of plans being draw up and monitored.

Equality plans that are embedded in an employer's general human resources/personnel policy are likely to be well developed and cover employees in all sections of the organisations. Carrying out equality action plans can help employers to comply with equality legislation and to make changes to their policies and structures in order to take account of and accommodate diversity. Of importance is that the action plans can be integrated into business planning, rather than be seen as a separate activity.

Equality reviews and action plans have a number of benefits including: tapping into the potential of a diverse workforce; enhancement of corporate operations; improved image of the employer; being able to harness the full range of capacities of all employees; deficiencies in human resource practices will be identified and addressed; and support towards a workplace consensus on employment equality issues is built.

#### Equality Action Plans

In some countries there is specific legislation requiring equality plans (in the public and private sectors).

- Austria: the Act on Equal Treatment for Men and Women in the Public Service provides for preferential hiring, treatment, promotion and training of women (through quotas).
- Belgium: private sector employers may voluntarily draw up equality action plans, although in cases of company restructuring this is obligatory. It is obligatory for all public sector employers to draw up equality action plans.
- Denmark: legislation requires that the public sector, state institutions and state-owned companies incorporate equal opportunities in the planning and administration, including a report on equality every two years where there are more than 50 employees.
- Finland: employers with more than 30 employees in the public and private sectors are required under legislation to draw up workplace equality plans and introduce gender equality progress in annual personnel/training plans.

- France: legislation introduced in 1983 provides a legal framework for voluntary equality plans, and legislation passed in 2001 requires companies with 50 or more employees to draw up an annual report on the position of women and men; specific equality bargaining is required at company level.
- Germany: legislation passed in 2001 requires the public sector to draw up equality plans, which also allow there to be preferential treatment of women in areas where they are under-represented, including gender mainstreaming measures.
- Hungary: legislation requires state-owned companies with over 50 employees to draw up annual gender equality plans.
- Italy: companies can apply for funding for positive action plans, whilst in the public sector positive action plans are an obligation.
- Norway: there is a general duty on employers to promote gender equality; companies have to report on equality activities in their annual reports.
- Slovenia: public authorities have to produce plans and biannual reports on the implementation of the National Programme for Equal Opportunities for Women and Men.
- Sweden: legislation requires all employers with 10 or more employees to draw up annual equal opportunities plans.

#### *Irish Equality Authority*

Tackling gender equality and gender gaps has been the subject of three cross-sectoral national agreements. One practical outcome was the establishment of the National Framework Committee for Equal Opportunities at the Level of the Enterprise. One successful initiative has been the development of workplace equality auditing, which is provided for under the *National Development Plan 2000-2006*. A programme of Equality Reviews and Action Plans has been developed by the Equality Authority, the focus of which is on all of the nine equality grounds, in order to reflect the diversity within the gender ground. This is a voluntary system of equality reviews and a template has been developed to provide a framework to the reviews that identifies strategic issues, examines work environment and organisational culture, as well as examining the contribution of policy, practice, procedures and perceptions in the workplace to achieving equality outcomes.

Companies can have funding for an external auditor from the Equality Authority, which is funded by the government under the National Development Plan. Reviews are overseen by an Equality Steering Committee representing managers, staff and unions.

#### *ESB*

In 2003, ESB commissioned an external audit, the results of which contributed to the equality agenda that is currently being pursued. It annually reviews progress against action plans. Progress and outcomes are presented to ESB Board in Quarter 4 each year. ESB has tried to ensure that equality and diversity is not just an issue that is championed by the Human Resources team and designated managers who have equality and diversity targets and responsibilities in all areas of the organisation.

#### *Vattenfall*

In Sweden, equality legislation provides the background to equality developments in the company. As a Swedish company, Vattenfall is required to publish in its annual report data on the position of women in the workforce. Under the requirements of the Equal Opportunities Act, Vattenfall is obliged to carry out an annual equality action plan, in partnership with trade unions. The plan has to be monitored and evidence provided of actions taken to redress inequalities that have been identified. One of the benefits of the provisions in the Equal Opportunities Act is that it requires clear and measurable objectives to be put in place. There is a positive impact in that staff can see the company implementing actions with positive outcomes, for example, in the area of salaries. Each business unit has to draw up its own equality action plans.

#### *Endesa*

As part of the company's diversity strategy an annual action plan is proposed with a matrix of indicators and measurements which will enable the company to measure progress against objectives. In order to carry this out a monitoring team is proposed from all areas of management, corporate and business units, and companies and headed by the Corporate HR Vice President. An Observatory will act as a tool for the establishment and monitoring of the policy; generate and share knowledge and understanding. Through analysis of information from other companies who are leaders in the field of diversity and mechanisms for sharing and transfer of information can help to identify methods for implementation and roll out and annual priorities.



Developing an equality action plan can be useful for collecting data and evidence on how equality and diversity are accommodated in an organisation. Data collection is central to the plan, providing the evidence needed for an organisation to develop its own action plan for addressing the problems or inequalities that have been revealed. Often equality plans reveal discrimination or inequalities in pay levels, for example, if women are more likely to be appointed at lower points in the pay scale than men or where women are paid less per hour than men even when they are doing the same job; it is often the jobs and grade titles that differ.

**Steps to take in preparing an equality plan:**

*Step 1: What is the gender composition of your workplace?*

Identify the percentages of women and men in each occupational group or grade. Which jobs are male dominated (with over 70% men) and which are female dominated (with over 70% women). Highlight issues such as the distribution of working time patterns e.g. of full-time, part-time, temporary and permanent positions, pay levels, career development and training opportunities for women and men.

*Step 2: Identify where inequalities exist:*

From your baseline data, it should be possible to identify specific areas of inequality, for example, unequal pay because of bonuses paid to employees who work a certain number of hours or in certain occupations, or poor access to promotion, education and training experienced by part-time workers or women's occupations.

*Step 3: Develop a set of actions to resolve the inequalities identified:*

These can take the form of an action plan which highlights policies that need to be developed, priorities, areas for action, a timeframe for implementing actions, who is responsible and the resources required to implement the actions.

*Step 4: Consult with staff:*

Hold focus groups, carry out a survey or interviews with staff to capture attitudes to and perceptions of equality and diversity in the workplace, and any experiences of discrimination or inequality in the workplace.

*Step 5: Monitor progress:*

Regularly review the progress in implementing actions, and ensure that there is an annual reporting system, for example, to the Senior Management Team and/or the Board.

**See Appendix 6 for a template for an equality action plan.**

**b) Equality and diversity monitoring and data collection**

Having appropriate and accessible data (quantitative and qualitative) is essential to achieving equality and diversity in practice. Data is an essential part of equality action plans and enables baseline positions to be established, progress to be tracked and monitored, and trends and changes to be marked. Data can also help to change stereotypes and incorrect assumptions about women's work, by making their contribution to economic development more visible.

Monitoring the implementation of equality and diversity programmes is important for accountability and for measuring the impact and progress of policies and initiatives.

## Data checklist

- Develop data management systems for collecting quantitative data on the position of women and men across the organisation, including providing an analysis of this on an annual basis (this can be incorporated in the equality action plans detailed above).
- Link equality and diversity objectives into performance management and appraisal systems.
- Develop performance indicators on equality and diversity and review these regularly.
- Ensure that data is comprehensive and covers all aspects of women's employment, pay and working time arrangements.
- Provide comparable data so that workforce composition can be monitored and compared over time.
- Update your data on a regular basis and track it over time so that progress to achieving equality can be monitored.
- Present data in an accessible and clear way so that it can be understood by employees and their trade unions.
- Disseminate the data widely so as to ensure that it can be used as a tool to promote equality.
- Consult with employees regularly through focus groups and employee surveys to gain feedback on the organisation and its policies. Qualitative data, through focus groups, interviews and case studies, can also help identify the experience of discrimination by women, particularly if it is indirect and hidden.
- Consult with trade unions on the design and implementation of data systems.
- Put in place realistic timescales for data collection and reporting.

*Statkraft*, along with other Norwegian companies, is required to report on the position of women in the company, including issues such as pay and seniority. There is a section in the company's annual report that presents data and progress in equality and diversity. Another important area of evaluation is an annual staff survey, completed by up to 94% of staff. The survey examines areas such as management, business development, work organisation, competence, participation of staff in department and company goals, and a broad range of issues, including harassment at work. There have been high levels of staff satisfaction reported in areas such as working environment and competence development. Staff generally appears to be happy in their jobs and there is an environment more or less free from harassment. For example, 86% are strongly engaged in their work (compared to a benchmark of 70% across Norway) and female staff has higher levels of satisfaction with the company than male staff. Other than harassment at work, equality and diversity issues are not specifically covered in the survey.

The Norwegian Gender Equality Act (amended in 2003) places a general duty on employers to promote gender equality. Guidelines on how to promote equality are provided by the Gender Equality Ombudsman and companies are required to report on equality activities in their annual reports. Issues covered include pay and the gender wage gap, working conditions, recruitment, career development and seniority. In effect, this has meant that companies have been required to collect data on the position of women, set objectives and measure progress towards equality. Legislation also requires that at least 40% of Board representation is of women (*Statkraft* currently exceeds this).

### **c) Mainstreaming equality and diversity**

Mainstreaming equality and diversity means that account is taken of the impact of a policy or activity on a particular group or groups and, in some cases, this may require additional or specific actions that overcome the adverse impact. This brings equality considerations into the centre of all decision-making and ensures that policy and practice in the organisation makes a contribution to equality and diversity outcomes, even if they are not equality focused as their main objective. Most importantly, a mainstreaming approach allows for diversity to be accommodated, valued and resourced.

A mainstreaming approach requires there to be:

- Clear equality objectives, with targets and timescales.
- A method for assessing how a policy decision can achieve the equality objectives and accommodate diversity
- Participation of the groups affected by the decision in the assessment of impact.
- Monitoring of equality outcomes, including the collection and analysis of relevant data.

Both targeting of activities and mainstreaming should work together in a dual approach. It is important to note that targeted initiatives can also inform and shape mainstream initiatives by addressing a situation created by past discrimination.

**An equality proofing template can be found in Appendix 7.**

#### **How to implement gender mainstreaming**

There are some simple steps that can be taken to implement a gender mainstreaming approach.

- How many women and men are affected by this measure and how many women and men participate in it?
- How are resources allocated between the sexes (finances, access to information and training, use of time etc)?
- What are the relative benefits of specific measures for men and women?
- What are the causes of existing gender patterns of representation and resource allocation?
- What are the possibilities for change and how can it be achieved?

Gender mainstreaming should also mean that we not only identify what we want to take place, but that we also monitor and evaluate the outcomes of actions. In doing this, the following issues can be considered:

- Define the desired outcome of an action
- Assess the gender relevance of a proposed agenda item
- Develop options that help to address gender equality
- Make recommendations for changes to implement gender equality
- Implement actions that can result in gender equality
- Monitor and evaluate the impact of the action on gender equality



## **Section 6: Equality and diversity in the workplace: the role of the social partners**

### **Introduction**

The social partners have an important role to play in promoting equality and diversity and there are many good examples of how a social partnership approach brings new ideas and dynamism to human resources.

In this section of the toolkit, practical suggestions and examples of social partnership approaches to equality and diversity are presented. Some practical guidance is provided on drawing up agreements and partnership approaches to promoting and accommodating equality and diversity in the workplace.

#### **Working in partnership to increase the representation of women in science, engineering and technology**

In the UK, the report of the government's Women and Work Commission (published in February 2006) recommended a number of measures to improve the representation of women in sectors and occupations where they are under-represented. As a result, the government has agreed to fund a number of partnership projects to address the under-representation of women. Prospect, the trade union organising staff in science, engineering and technology, is preparing a partnership project application with the UK Science Engineering and Manufacturing Sector Skills Council to help develop career plans and boost opportunities for women employed in the sector. A project is being developed to produce a lifetime career progression plan for training and development for women. The project aims to encourage a culture change in companies to ensure the skills of women are recognised and that they are provided with opportunities for progression throughout their careers. The companies that will be involved in the project will act as ambassadors and champions to other companies in future years. They will be required to disseminate key messages to their supply chains and share best practice in terms of developing women and enhancing their skills.

#### **a) The role of the social partners in gender equality**

##### **The role of the social partners in gender equality**

The social partners at the national and European levels have been instrumental in negotiating agreements on gender equality, including Directives on part-time work and parental leave, and on the Framework of Actions on Gender Equality (2005). The European Federation of Public Service Unions (EFPSU) and the European Trade Union Confederation (ETUC) both have Equality Action Plans that stress the importance of improving the representation of women in trade unions and in the workplace.

##### **Framework of Actions on Gender Equality**

In 2005, a Framework of Actions on Gender Equality, agreed between the social partners ETUC, CEEP and UNICE, has specified actions in four areas:

- Addressing gender roles
- Promoting women in decision-making
- Supporting work-life balance
- Tackling the gender pay gap

This framework has helped to highlight the importance of actions that need to be taken by employers, trade unions and governments in achieving gender equality and meeting the Lisbon Strategy (2000) objectives. The Framework highlights the importance of the social partners taking a responsibility to address gender gaps and inequalities, and to promote a more balanced participation of women and men in decision-making. Member states will be required to produce an annual report on the implementation of actions under the four broad headings.

### **Joint Declaration by the social partners in the electricity industry**

A Joint Declaration between the social partners<sup>2</sup> in the electricity industry on equal opportunities and diversity has reaffirmed that equal opportunities and diversity in working life is one of the main goals in the work of the sectoral social dialogue committee of electricity sector. The Social Partners recognise that the industry shall not practice discrimination against employees on the basis of age, health, national or ethnic origin, sex, sexual preference, language, religion, opinion, family ties, trade union activity, political activity or any other comparable circumstance. Issues covered include positive action for women and men into non-traditional roles, training and development, combating sexual harassment, work-life balance, equal pay for work of equal value.

There are a number of ways in which equality and diversity can be integrated into collective bargaining and union/employer negotiations in the workplace. These include:

- **Mainstreaming:** collective bargaining can be used to mainstream equal opportunities into industrial relations.
- The **flexibility** of the bargaining process allows a more specific, “tailored” approach to equal opportunities issues. A tailored approach means the collective agreement is more likely to be acceptable to the bargaining parties.
- This wider agenda brings new relevance into **union activities** and attracts new members.
- **Women’s voice:** women can contribute expertise and particular experience of the variety of women’s concerns and working conditions from “lived experience” which informs negotiations and leads to more effective collective agreements.
- **Modernisation** of the collective bargaining system through a realisation of the changing face and increased feminisation of the European workforce.
- **Economic benefits:** more effective use of the female workforce increases competitiveness.

Many trade unions across Europe have introduced structures for improving the representation of women, for example, through active recruitment strategies for part-time women workers, quotas and proportional systems of representation for women in union decision-making bodies and collective bargaining structures, targeted training courses for women trade union members, and structures to represent women’s interests through women’s committees and bodies. Increasingly, unions are using gender mainstreaming as a method for integrating women’s issues into union policy.

The 1976 Directive on equal treatment in employment, vocational training, promotion and working conditions has put added pressure on the social partners to introduce provisions on equality. The 2002 revision of the Directive provides a framework for data-collecting, whereby the social partners are encouraged to address inequalities. Equality audits are recommended as a way of implementing equality in the workplace through a social partnership approach. They can result in equal opportunity and diversity policies for the company, ensuring they become part of the mission of the company. Other areas of EU policy have been important in highlighting collective bargaining action on equality. For example, the 1996 Communication on Sexual Harassment at work required the social partners to introduce measures to combat sexual harassment through the collective bargaining process.

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<sup>2</sup> The Union of the Electricity Industry-EURELECTRIC and EPSU/EMCEF, representing the employers and trade unions respectively

**Siobhan Browne, Equality Officer, ESBOA, Ireland**

Siobhan is the Equality Officer of her union, the ESBOA, an elected position that she has held for the last two years. She is released from her position in ESB for 1.5 days a week in order to carry out her union responsibilities, which can be very demanding. ESBOA represents managerial, clerical, administrative and technical workers in the Irish electricity company, ESB. Siobhan sees the role of the Equality Officer as being important to drive the equality agenda for the ESBOA. The union has an Equality Committee and there is a high commitment to equality, which can be seen in the three-year strategic plan agreed at the Annual Delegate Conference. Siobhan works with officers and members on equality and diversity issues and, at company level, she represents her union on the ESB Joint Equality Council. Siobhan also represents ESBOA, through EPSU, on the Sectoral Social Dialogue Committee on electricity.

When she is not carrying out her union duties, Siobhan works in the ESB in an administrative position. Last year she completed a BA in Human Resource Management and Industrial Relations. She is currently working in a temporary position in Strategic Human Resources, which is a position that compliments her union work very well. She says that “human resource and union strategies bear many similarities, albeit that the methodologies and approaches are different”. Siobhan also recognises the value of the partnership approach that has been developed between the ESBOA and other unions and the ESB. She believes that “the joint approach to developing equality has benefited both the company and union relations. It has raised the status of equality and diversity issues and put them high up on the agenda.” She also adds that “what I enjoy most about my work is the opportunity to meet other like-minded people at the highest level within ESB and other organisations and working with them at that level to achieve equality and diversity objectives and being in a position to influence policy at a number of levels. It is a very challenging and rewarding job.”

A number of trade unions have developed policies on gender mainstreaming. The European Federation of Public Service Unions (EPSU) has policy on gender equality that stresses the importance of the equal representation of women and men in decision-making structures, the equal sharing of work and family life and the importance of gender mainstreaming all policy processes and actions.

*Agreement in the French electricity industry*

A national intersectoral agreement on gender equality and gender balance in workforce composition was signed in April 2004 by France’s main employers’ organisations and trade union confederations. It covers matters such as narrowing the gender pay gap, preventing maternity leave from adversely affecting women’s careers and addressing labour market segregation. The accord aims to provide a framework for lower-level bargaining and does not lay down concrete targets or sanctions. A number of recent company and sector-level agreements have dealt with similar issues.

At sector level, in early March 2004, two employers’ associations - the French Electricity Industry Association (Union française de l’électricité, UFE) and the National Association of Gas Industry Employers (Union nationale des employeurs de l’industrie du gaz, UNEMIG) - and four unions - CFDT, CFTC, CGT and CGT-FO - in the electricity and gas industries signed an agreement promoting gender equality in employment in terms of pay, career development, recruitment, working time and training.

*Vattenfall*

The company has a good relationship with trade unions and has fostered an open dialogue between employees, colleagues, stakeholders and customers. There are four main unions in the company. The national collective agreement provides for an equality and diversity framework for companies in the sector and the unions are actively engaged in promoting equality and diversity through the consultations around the annual equality action plans (where two formal meetings are held a year). According to Vattenfall’s Diversity Manager, the Equal Opportunities Act “has brought us closer to the unions because there is a requirement that the unions should participate in the process of drawing up and monitoring the equality action plans”. The unions also see that there is a positive role in bringing a different perspective and new ideas. In particular, unions can help to foster change and put pressure on the company to implement new solutions.

In addition, the company no longer has an equal opportunities committee on the basis that a process of gender mainstreaming has been introduced to ensure that gender issues are incorporated into all negotiations and discussions with unions in each business unit (where a joint committee exists). Whilst this reflects the direction of gender equality policies and practices in Sweden, there are some concerns amongst trade unions that gender issues do not always get

sufficient priority of focus, with gender often being at the bottom of the agenda. In this sense, trade unions play a vital role in ensuring that gender equality issues stay on the agenda of meetings and negotiations.

The unions in the company also have their own policies that have helped to improve the awareness and understanding of gender inequalities. Gender equality is a major priority in all union policies and strategies and there has been a move toward improving the representation of women in decision making through quotas, the integration of gender equality into all policies, and the drawing up of equality strategies.

#### *Statkraft*

On the initiation of trade unions in the energy sector, Statkraft along with three other companies established a project with the trade unions to recruit more people from ethnic minorities into the blue-collar positions. The project appointed five trainees in each company and provided them with an initial six months' training in a mainstream school (with a curriculum covering Danish, accounting, skills development, driving and specific skills for working in power plants). The training was followed by a six-month placement in the company. The effect of this training was that the trainees were more skilled than the majority of people being recruited into the companies and 65% have been employed by the companies on a full-time basis. The project had a very positive response from trainees and the company is considering extending the project to other under-represented groups.

Although there have been no specific equality agreements in the company, the role of equal opportunities legislation has provided an important backdrop to the development of personnel and other staff-related policies, the development of which always involves the participation and consultation with unions. The company's human resources strategy was drawn up in consultation with unions. The unions believe that the company takes union representation seriously and that the voice of elected representatives on the Board has created a positive environment and a consensual approach to industrial relations. Women have also played an important role as union representatives and often are able to bring in a perspective based on their experiences of unpaid work, especially in the family.

#### *Enel*

Union involvement in Enel is high – this is partly because of the representation of the unions on the Equal Opportunities Committee and the mainstreaming of equality into the collective agreements. There is broad support for equality and diversity issues and recognition that there is a need for more feminisation of the senior levels of the union, particularly in negotiating positions at the national level. Unions see themselves as playing important roles in joint problem-solving with management and in finding common solutions. They would like to see more training for equality in the unions, including integrating equality into Enel's European Works Council.

A social partner initiative, FISDE, has been established in Enel to provide supplementary health assistance. One initiative has been developed to support disabled people in the company and in the community. In the workplace, there have been specific training programmes and work placements for disabled people, with a particular emphasis on ensuring that disabled people have promotion opportunities. One example of this is a training programme for blind employees working as telephonists who had the opportunity to retrain as computer operators, using tools in Braille and voice synthesisation. In the community, support and services are provided to children with learning disabilities whose parents work in Enel. There are rehabilitation services, specialist holidays and the provision of training programmes for young disabled adults.

#### *ESB*

The ESB Joint Equality Council was set up to provide a social partnership focus to the development of equality. It meets bi-monthly and there is equal representation nominated from the company's five larger unions and managers. The Equality Manager also attends the meetings and is chaired by an external independent Chairperson. It has created a shared vision of equality and all members have been equality champions in their own area. According to members of the Joint Equality Council this is a very good example of partnership and it has resulted in there being a systematic and planned approach to equality. It has enabled the unions and managers to work together in initiating, developing and overseeing the company's equality plans, policies and procedures, audits, work-life balance survey and thereby ensuring the general mainstreaming of equality across the company.

“We are trying to achieve best practices across the organisation and our Joint Equality Council with representation from unions and management is very important part of this plan. We work hand in glove with the trade unions and it is a very important forum for progressing equality and diversity issues. The staff is really important and essential to the success of ESB. The Trade Unions have been great champions of the issue through the Council. Diversity is a very wide-ranging issue; you get diverse views at different levels of the organisation. It is important to ensuring that everyone feels valued and part of the organisation and have an opportunity to have their views represented”. John Campion, Executive Director of Human Resources and Corporate Affairs, ESB



## b) Equality and European Works Councils

Women can provide an added value to European Works Councils (EWCs). By being present as negotiators, women can help to humanise the information, consultation and negotiating process and represent women's interests on the EWC. Mainstreaming equality into the work and functioning of EWCs means that gender equality can have an impact on all areas of negotiation, information and consultation.

### *The development of equality initiatives in EWCs: some examples*

There are some examples of good practice in the development of equality initiatives, particularly those that represent female-dominated industries or sectors. Some EWCs have made express commitments to improving the representation of women and to progressing equality and diversity issues.

- The Industry Federation UNI-Europa, has agreed a set of guidelines for the finance sector to improve the participation of women representatives in the EWCs and in the steering committees and to giving high priority to equal rights for women and men within the company. Affiliates are asked to ensure that the composition of the EWC reflects the gender distribution of the workforce in the company in question. (UNI-Europa Finance *Guidelines on European Works Councils. EWC Guidelines – Achieving Best Practice*). UNI also has a Women's Action Plan: *Establishing Equality Between Women and Men and Eliminating All Forms of Racism and Discrimination*.
- In an equal opportunities agreement at **Danone**, it was agreed that in every country/every company working groups, consisting of employer and employee representatives, should take stock of possible disadvantaging of women, agree measures by means of which the disadvantaging of women can be overcome, and regularly examine the success of the measures at a national level and in the EWC.
- At **Nestlé**, it has been agreed that all cases where the principle of equal salary for equal work is, in practice, infringed will be placed on the EWC's agenda.
- The **Unilever EWC** established a diversity working party to address equal opportunities, including embedding equality into the organisation, in terms and condition of employment, human resources management and culture. Unilever has launched a plan that seeks to increase the representation of women at senior levels in the organisation. Equality has been on the agenda of the Unilever EWC on several occasions. Unilever believe that diversity can increase the potential of an organisation. A more diverse workforce is seen to be important to reflecting the customer base, which is largely female. This can be achieved by changing the culture of the organisation and introducing career enhancement schemes, flexible working hours and other policies to support women's progress into senior positions.
- **Ericsson** has published a brochure that outlines the employment situation of women, their vocation training and qualifications, their professional careers, issues related to maternity and maternity protection and measures concerning the work/family life balance in Ericsson subsidiaries in each country. Women delegates on the EWC have called for a number of measures to assess the position of women in the company and to introduce actions to improve gender equality, the appointment of an expert on gender equality issues on the committee, an annual budget for equality activities and better networking between delegates.

### **Suez European Works Council: equality and diversity**

The Suez EWC is a good example of the integration of equality and diversity into the activities of the company, including the development of a policy framework on equality and diversity. This is important as there are great variations in the same company between countries, with some having developed equality plans in cooperation with trade unions, including non-compliance sanctions, while others have not. By developing a coherent and consistent approach to equality and diversity through its EWC, Suez can potentially be a leading example for other companies, both in terms of process and content.

Suez's policy on Social Responsibility has been the basis for the development of policy on equal opportunities and diversity. There are three underpinning principles: commitment, performance and responsibility. Equality has been included as a principle in the International Social Charter (1998), the Ethics Charter (1998), and the commitment to the Right to Lifelong Learning Education and Training (2004) and

the Diversity Charter (2004). A number of discussions have been taking place within Suez about the further development of equality through an equality charter and/or equality policy that will cover all equality grounds and will refer to the way in which the company can promote diversity and equal opportunities. The unions represented in the EWC are pressing for concrete and binding measures such as an equality plan and an agreement on equality and diversity.

In order to progress equality issues through the EWC, Suez has established three committees, one of which was a social partner committee on equality and diversity. The other two committees have been for managers in the company, with one focussing on diversity issues and the other of women managers from France and Belgium. The Equality and Diversity Committee has both male and female representatives from the company and from trade unions represented on the EWC from Germany, the Netherlands, Spain, Norway, Belgium and France. A gender equality expert from EPSU assists the committee. The committee has focussed on establishing baseline data to identify if there is equality of treatment between women and men.

An *Action plan on gender equality, 2005-2006*, agreed by the Equality and Diversity Committee, sets out measures to promote and achieve gender equality at group level. It includes the establishment of a set of common principles on gender equality, the collection of gender-based data, dissemination of information, the creation of a Suez equality network and a proposed equality conference. It is proposed that the company carry out an annual equality audit and a qualitative survey on gender equality in the company.

A *checklist on data collection* has been drawn up by the social partners as part of the action plan. The objective is that this will lead to more gender desegregated data in the company. Data collection is seen as a necessary step to the development of equality work and is a key instrument for identifying any gender gaps. The checklist covers issues such as employment and recruitment, employment contracts, access to promotion and training, working time, leave and work organisation issues and remuneration.

*Proposed policy commitment to promoting equality and diversity within the company*

A draft policy framework for equality and diversity has been proposed by the management, based on the outcomes of the three committees. The policy will have to be further discussed and agreed with trade unions in the EWC. The proposed policy will cover all equality grounds and will set out the company's commitment to progressing equal opportunities and diversity in areas such as recruitment, promotion and access to training, and mechanisms for monitoring the policy through a diversity network and an annual report. Trade union representatives are to be involved in monitoring the implementation of the policy.

As Nadja Salson, equality expert on the staff side of the EWC, says: "The Suez bipartite equality and diversity committee is the right structure to advance the equality agenda in Suez. Trade union involvement from the outset of the discussion is crucial to ensure that the interests of all employees are taken into account, not only those of management. Developing the right policy is just a first step. Trade unions at EU, national and workplace levels will have then a key role to play for disseminating, implementing, and if need be, improving the agreed measures."

Mainstreaming gender equality into the activities of EWCs means applying a gender lens to all issues that come onto the agenda, even though initially they may not necessarily appear to be gender issues. Here are some examples of issues that regularly come up on the agendas of EWCs and how they can be examined for their impact on gender:

- *Training*: Who benefits from the training? Do women benefit equally to men? If not, how can the company rectify this? Are part-time workers included in training? Is training held at times that are convenient to women?
- *Restructuring*: What groups of workers will be affected? What retraining measures are planned? Are they adapted to women's situations?
- *Health and safety*: What are the issues that impact on women and men? Are specific health and safety issues raised concerning pregnant or breastfeeding women?

- *Changes in work organisation or working methods:* What is the impact of this on women's participation in the workforce? Will this encourage or discourage women's participation? How are women involved in discussions about work organisation?
- *Closure or cut backs:* What is the anticipated impact on women? Who will be most affected? Are there special measures that can be put in place to support the vocation training of women who are affected?
- *Timing and location of meetings:* What are the main issues reflecting women's concerns? Are issues such as childcare, times that meetings are held geared to suit women? Have women been trained to participate in the EWC?

### **Checklist of practical suggestions for progressing equality in EWCs**

- Organise a gender equality training programme for potential future women EWC members.
- Put in place a system for monitoring the numbers of women and men on EWCs and Special Negotiating Body.
- Organise a meeting on equality before the EWC meets.
- Create special seats for women on the EWC or set targets to achieve the representation of women by a certain date; this should be proportional to the representation of women and men in the industry or sector of the EWC.
- Introduce a gender mainstreaming approach so that an equality dimension can be integrated into collective bargaining and so that priorities for action concerning gender equality can be established and discussed.
- Develop methods for evaluating and following up on the implementation of decisions regarding gender equality.

### **Trade unions:**

- Establish an equality committee at the level of the European Industry Federation to ensure that gender equality issues are raised.
- Ensure that where there is a male representative his alternate is a woman; this can be particularly useful in providing women with experience to participate on the EWC.
- Appoint an equality advisor onto the EWC.
- Introduce operating rules for select committees and ensure that there is time for preparatory meetings and the appointment of trade union experts.



## **Appendix 1: EU policy on equality and anti-discrimination**

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The prohibition of discrimination on the grounds of sex and the promotion of gender equality is covered under Articles 21 and 23 of the Charter of Fundamental Rights of the European Union. Article 3(2) of the Treaty sets out the objective of eliminating inequality between women and men. Specific gender equality initiatives include directives, gender mainstreaming and a framework of actions on gender equality providing for an integrated approach and action programme agreed between the social partners (ETUC, CEEP and UNICE), action programmes to raise awareness and build capacity. Particular attention is given to cooperation with the social partners in order to avoid gender segregation in the labour market and to reduce the gender pay gap; to address childcare, the reconciling of work and family life, pension systems in the future; to increase women's labour market participation; to promote employment for immigrant women; and to promote measures to combat violence against women (CEC 2005).

### **Directives**

#### **a) Equal treatment between women and men**

75/117/EEC approximation of the laws of the member states relating to the application of the principle of equal pay for men and women

76/207/EEC implementation of the principle of equal treatment for men and women as regards access to employment, vocational training and promotion, and working conditions

79/7/EEC progressive implementation of the principle of equal treatment for men and women in matters of social security

86/378/EEC implementation of the principle of equal treatment for men and women in occupational social security schemes

86/613/EEC application of the principle of equal treatment between men and women engaged in an activity, including agriculture, in a self-employed capacity, and on the protection of self-employed women during pregnancy and motherhood

92/85/EEC introduction of measures to encourage improvements in the safety and health at work of pregnant workers and workers who have recently given birth or are breastfeeding

96/34/EC framework agreement on parental leave

96/97/EC implementation of the principle of equal treatment for men and women in occupational social security schemes (amendment Dir 86/378)

Directive 96/34/EC on the framework agreement on parental leave concluded by UNICE, CEEP and the ETUC

97/80/EC burden of proof in cases of discrimination based on sex

2002/73/EC implementation of the principle of equal treatment for men and women as regards access to employment, vocational training and promotion, and working conditions

#### **b) Race**

2000/43/EC implementing the principle of equal treatment between persons irrespective of racial or ethnic origin

#### **c) Religion or belief, disability, age or sexual orientation**

2000/78/EC establishing a general framework for equal treatment in employment and occupation (religion or belief, disability, age or sexual orientation).



## Appendix 2: Sources of further information

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### a) Contact information for company case studies contained in the Toolkit

ESB, Ireland: Freida Murray, Equality Officer, ESB. [Freida.Murray@esb.ie](mailto:Freida.Murray@esb.ie)

Enel, Italy: Cristina Cofacci, Industrial Relations Manager [cristina.cofacci@enel.it](mailto:cristina.cofacci@enel.it); Paola Raffaella Giannone, Diversity Manager [paolaraffaella.giannone@enel.it](mailto:paolaraffaella.giannone@enel.it)

Endesa Spain: Arantxa Balsón Yarritu, Diversity Manager, [arantxabalson@endessa.es](mailto:arantxabalson@endessa.es)

Vattenfall, Sweden: Lena Ohlsson, Diversity Officer, Vattenfall. [lena.ohlsson@vattenfall.com](mailto:lena.ohlsson@vattenfall.com)

Statkraft Norway: Erik Norberg, Human Resources Director. [erik.norberg@statkraft.com](mailto:erik.norberg@statkraft.com)

Energie E2 Denmark: Lars P Breusch, Human Resources Manager, [lpb@e2.dk](mailto:lpb@e2.dk)

Empower Training Ltd UK: Elaine Clarke, Director. [elaine.clark@empower-training.com](mailto:elaine.clark@empower-training.com)

EON Hungary: Gazdag Ildikó, Manager. [ildiko.gazdag@eon-hungaria.com](mailto:ildiko.gazdag@eon-hungaria.com)

DEMASH Hungary: Tóth József, Director of Human Resources, [tothj@demasz.hu](mailto:tothj@demasz.hu)

### b) Organisations

EURELECTRIC <http://www.eurelectric.org/>

EPSU [www.epsu.org](http://www.epsu.org)

EMCEF [www.emcef.org](http://www.emcef.org)

European Women's Lobby (English and French) <http://www.womenlobby.org>

European Union (all EU official languages) <http://europa.eu.int/>

European Commission – equal opportunities (all EU official languages)  
[http://europa.eu.int/pol/equopp/index\\_en.htm](http://europa.eu.int/pol/equopp/index_en.htm)

European Observatory on Industrial Relations <http://www.eiro.eurofound.eu.int/>

European Trade Union Confederation (in English and French) <http://www.etuc.org>

European Foundation for the Improvement of Living and Working Conditions  
<http://www.eurofound.ie> (English and French)

Women into Science and Engineering - WISE [www.wisecampaign.org.uk](http://www.wisecampaign.org.uk)

The GERI (Gender Equality and Race Inclusion) project [www.geriproject.org](http://www.geriproject.org)

## c) Publications

*Joint Declaration of EURELECTRIC and EPSU/EMCEF on Equal Opportunities and Diversity*, Download from [www.eurelectric.org](http://www.eurelectric.org)

*Equal Opportunities and Diversity: Changing Employment Patterns in the Electricity Industry*. 2005. By P. Fairbrother, Cardiff University. Published by EURELECTRIC. Download from [www.eurelectric.org](http://www.eurelectric.org)

*For Diversity Against Discrimination*. European Commission information and resources on anti-discrimination: (available in all EU official languages, published by the European Commission. <http://www.stop-discrimination.info>

*Business Case for Diversity: Good Practices in the Workplace*. Available in all EU official languages, published by the European Commission. Download from <http://www.stop-discrimination.info/4586.0.html>

*Managing Diversity: what's in it from business*. Available in all EU official languages, published by the European Commission. Download from <http://www.stop-discrimination.info/4586.0.html>

*What can Employers do to tackle discrimination and promote diversity?* Available in all EU official languages, published by the European Commission. Download from <http://www.stop-discrimination.info/4586.0.html>

*Good Practices in the Workplace* (published by the European Commission, October 2005. English only. Download from <http://www.stop-discrimination.info/2851.0.html#32660>)

*Promoting gender equality in the workplace*. 2002. Published by European Foundation for the Improvement of Living and Working Conditions. English only. Download from <http://www.eurofound.europa.eu/publications/htmlfiles/ef0161.htm>.

*Quality of Women's Work and Employment - Tools for Employment* (by the European Foundation. 2002. Published by Office for the Official Publications of the European Communities: Luxembourg)

*Time for Equality at Work*. 2002. Published by International Labour Organisation: Geneva. Download from [http://www.ilo.org/dyn/declaris/DECLARATIONWEB.GLOBALREPORTDETAILS?var\\_language=EN&var\\_PublicationsID=116&var\\_ReportType=Report](http://www.ilo.org/dyn/declaris/DECLARATIONWEB.GLOBALREPORTDETAILS?var_language=EN&var_PublicationsID=116&var_ReportType=Report))

*Working to our Advantage: A National Workplace Strategy. Report of the Forum of the Workplace of the Future*. 2005. Published by NCPP: Dublin.

*Promoting Gender Equality in the Workplace* by Olgiati, E. and Shapiro, G. 2002. Published by Office for Official Publications of the European Communities: Luxembourg

*The Female FTSE Index 2005* by Singh V and Vinnicombe S. 2005. Published by Cranfield School of Management: London

*Women in Leadership Positions: Practitioners Report* by CSR Europe, B2B Working Group, CSR Europe: Brussels

*Managing Equality and Diversity in the Workplace: An Employer's Guide to Resources*, published by the TRED Equal Project Dublin. [www.tred.ie](http://www.tred.ie)

*Women at Work: improving the representation of women in workplaces where they are under-represented*, by Jane Pillinger. 2006. Published by Dublin Bus, An Post and Iarnrod Eireann, Dublin

*Challenging Times: Innovative ways of organising working time: the role of trade unions*. 2006. Published by ETUC, Brussels



## Appendix 3: Equality Checklist

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### Creating an equality organisation

- Do you have an equality statement committing the organisation to promoting equality and accommodating diversity in its structures, policies and services?
- Do you have an equality and diversity policy covering the grounds of gender and other equality grounds such as race, disability and age?
- Is there senior management commitment to championing equality and diversity within the organisation?
- Is equality and diversity a corporate objective?
- Are equality and diversity initiatives costed into the budgeting processes of the organisation?
- Are there effective processes for managing equality and diversity within the structures of the organisation?
- Do you have a policy on equality and diversity in customer service?
- Does staff know about the policies on equality and diversity?
- Are the mechanisms in place to ensure that equality/diversity issues are communicated clearly to staff?
- Has staff been trained in equality and diversity issues?
- Are unions and staff involved in developing equality and diversity actions in the organisation?
- Have you considered conducting an equality audit or review of your internal employment structure and of your services?

### Mainstreaming Equality into Service Provision

- How does the organisation evaluate how best to serve its customers, including women, parents, disabled people, older people and people from ethnic minorities?
- Is equality built into the vision, planning and processes of services?
- Has equality and diversity been incorporated into frontline services provision and into customer services?
- Are services provided to meet the needs of a diverse clientele?
- Are frontline service providers aware of situations where discrimination occurs?
- Are service staff resourced and supported to accommodate equality and diversity?

### Data

- Is recruitment and existing positions in the company monitored by gender, age, disability and ethnicity?
- Does data collection take place in a sensitive and consensual manner with staff?
- Is data on performance fed back to staff?
- Is data used to assess equality policies and outcomes?

### Sustaining Equality

- Are there short- and long-term targets established to promote a rolling programme of improvement?
- Are there sufficient financial and human resources to ensure the sustainability of equality programme?
- Is there a pool of expertise in equality forming in the organisation?



## **Appendix 4: Model equal pay policy**

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(adapted from the UK Equal Opportunities Commission, *Code of Practice on Equal Pay*)

### ***Equal Pay Statement***

This organisation supports the principle of equal opportunities in employment and believes as part of that principle that male and female staff should receive equal pay for the same or broadly similar work, for work rated as equivalent and for work of equal value. It is in the company's interest and good business practice that pay is awarded fairly and equitably. The company recognises that, in order to achieve equal pay for employees doing equal work, we should operate a pay system that is transparent, based on objective criteria.

### ***Action to Implement Equal Pay***

In order to put our commitment to equal pay into practice we will:

- Examine our existing and future pay practices for all our employees including those in non-standard employment and those who are absent on pregnancy and maternity leave
- Carry out regular monitoring of the impact of our practices
- Inform employees of how these practices work and how their own pay is arrived at
- Provide training and guidance for managers and supervisory staff involved in decisions about pay and benefits
- Discuss and agree the equal pay policy with employees, trade unions or staff representatives where appropriate.

We intend, through the above action, to avoid unfair discrimination, to reward fairly the skills, experience and potential of all staff and thereby to increase efficiency, productivity and competitiveness and enhance the organisation's reputation and image.



## **Appendix 5: Model flexible work-life balance policy**

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### **1. Policy statement**

The organisation is committed to providing the widest range of flexible working options for employees in order to maintain a valued, committed and skilled workforce. The organisation recognises the value that work-life balance can have for staff, enabling them to balance family and care responsibilities, to carry out personal and leisure interests, to participate in their local communities, and to ensure that there is access to personal development and lifelong learning for all. The organisation also recognises that work-life balance is important for good health and well-being. The organisation discourages the practice of long hours.

### **2. Principles**

The policy allows all employees the right to work flexible hours and change their contracted hours of work. Each request will be considered fully and any refusal will be given a full and detailed explanation for the refusal in writing.

The policy incorporates equal opportunities on the basis that it will not discriminate, directly or indirectly, on the grounds of gender, race, ethnicity or national origin, sexual orientation, marital status, religion or religious belief, age or disability.

All employees have the right to be accompanied by the trade union representative or colleague during each stage of this procedure.

The policy will be reviewed periodically in the light of legislative change.

### **3. Examples of flexible working**

In addition to existing arrangements for holiday, maternity, parental and carers leave and support, employees can avail of any of the following flexible working options:

- Part-time working
- Job sharing
- Term-time working
- Flexible working, including varying starting and finishing times
- Leave for training and learning
- Unpaid leave and career breaks
- Annualised hours
- Compressed hours

### **4. Procedure**

A request for flexible working must be made by the employee in writing setting out:

- The change in hours, time or place of work and proposed start date
- Identify the anticipated effect on the organisation and how it can be dealt with in the team.

## Appendix 6: Equality proofing template

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Activity or aspect of the organisation selected for equality proofing	Objective	Are there differences between the target group(s) and the general population?	How does the proposed action impact on equality?	Have representatives of staff from the target group(s) been consulted?	Proposed action to resolve any identified inequalities?	What resources are needed?	Outcomes in terms of an equality objective	How are these actions monitored?

## Appendix 7: Equality Action Plan template

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Equality and diversity action plan						
Priority	Area of activity	Actions	Timeframe	Responsibility	Resources	Monitoring/review
1.						
2.						
3.						
4.						
5.						

Summary of areas requiring action	Summary of planned actions
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.

