

## WP2

# Report on Analysis of Training needs

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## DESK ANALYSIS

### INTRODUCTION

This report is part of the transnational project FRO Curriculum co-financed by the EU Action Programme in the field of Life Long Learning, Leonardo da Vinci.

FRO Curriculum meets the need for increased professional qualifications amongst teachers and trainers in VET within the field of gender equality and reconciliation policies in Italy, Poland, Portugal and Sweden. Increased qualifications will enable teachers and trainers to offer adequate training for enterprises focusing on management systems for gender equality and Family Responsible Organisations (FRO).

European enterprises, especially SMEs, are faced with growing global competition requiring new knowledge, skills and policies. Studies have shown the correlation between gender equality, family friendly policies and profitability in enterprises. Gender equality has also been acknowledged as a “necessary condition for the achievement of the EU objectives of growth, employment and social cohesion”. VET is an important tool for reinforcing the implementation of management systems for gender equality but there is a lack of training offers in this field for SMEs, their entrepreneurs and managers. This can partly be explained by the fact that few teachers and trainers have the necessary knowledge and awareness of how work life balance influences equal opportunities.

The aim of this report is to point out the status of the art of professional profiles and training needs among teachers and trainers in the field of FRO. This report is therefore the first step toward the definition of a comprehensive professional profile and the designing of a new training program for those teachers and trainers. The definition of this comprehensive professional profile and the designing of the new training program are indeed the final outcome of the FRO curriculum project.

The report focuses on the situation in Italy, Poland, Portugal and Sweden and it is structured, for each country, in two sections:

- Section A provides an overview of in progress training course addressed to HR management;

- Section B describes official standards in use in each country, norms in use for certification agencies, key features of the agencies in charge of granting certifications, territorial location of those agencies and description of the education of those persons in charge of certifying. Nonetheless, it contains and an analysis of CSR certification's modalities and enlists a few practises of gender audit and certification of family friendly behaviours.

## ITALY

### Section A

#### *The political-administrative structure of training in Italy*

Italy is divided into 20 regions, 103 provinces and 8.100 municipalities (*comuni*). The Italian state has the exclusive legislative competence on most of the main issues, among which the general norms referring to education and training.

The region has the “exclusive” legislative competence on vocational education and training, except for tasks that are carried out in liaison with the European Union and the “competitive” legislative competence on education in general.

The provinces and municipalities take care of arranging the appropriate school structures, and they also carry out interventions relating to adult education and counselling, also within the framework of the management of the employment services.

A process is currently under way whereby the regions are devolving the management of vocational training activities to the provinces.

As regards training activities, the regions manage their own funds and financial resources that are assigned to them by the Ministry of Labour and Public Education and by the European Social Fund.

Training activities can be carried out by: companies and organisations (both public and private) that plan training activities for their own employees; training institutions, conciliation committees, trade associations, professional associations, professional registers...; institutional bodies (universities, employment centres...).

### *Training of managers in charge of managing human resources in Italy*

Firstly, we should emphasize that Italian companies are not very organized in providing training activities for their staff. All the surveys confirm that there is a lack of training in companies in Italy, not only at operational and intermediate level, but also among those who are in charge of managing human resources. In fact, Italy is positioned among the last places in European rankings on lifelong learning, far behind other countries.

Until now, suppliers of training courses addressed to managers managing human resources in Italy have been:

- Universities (public and private);
- Business Schools;
- Corporate Universities;
- Vocational Training Centres (public and private ones);
- Consultants;
- Other Operators.

As far as universities are concerned, it should be highlighted that only recently, following the reform of the university system (1st and 2nd level degrees and university masters), have some universities started to tailor their studies to the requirements of the working world and therefore to enterprises, devoting more attention to the issue of lifelong learning by offering more focused courses (masters, etc.).

Similarly, if we refer to the Anglo-Saxon business school model, we can observe that very few Italian training institutions are included in this category.

They differ from the classic university due to their different courses, which are more oriented to acquiring managerial and problem solving skills. Mainly management schools have been set up in Italy. These have admirably compensated for the shortcomings in our educational system of such an institutional model, offering above all post graduate courses (masters) for young graduates who still have to enter the labour market.



In turn, corporate universities are rather rare in the national training panorama as a limited number of large companies operate in our economic system. Historically, only some large groups, such as Olivetti, ENI, IRI, FIAT and Telecom, have created solid internal structures for management training of their middle managers and executives. What characterises corporate universities, besides the large size of their structures and the breadth of the training courses that are offered, is a broad range of complementary activities (among which surveys, studies, projects), which are similar to those that are usually conducted by universities.

In addition to the above types of bodies, various other kinds of institutions operate in the field of management training, offer courses on a wide variety of subjects, of different lengths and addressed to various targets etc. Another area which should not be ignored is the role of consultants (individuals, working in association with other consultants or in companies). In many cases, these consultants combine training planning interventions with consultancy activities.

Among the above-mentioned categories, not many players organise courses which are specifically addressed to managers in charge of managing human resources and which pay particular attention to the gender issue or to reconciling work and private life.

However, there are a few exceptions, such as for instance the Scuola Superiore di Sant'Anna.

The Scuola Superiore di Sant'Anna is a public university, established under a special statute, which operates in the field of applied science. Each year, the university organises a course addressed to executives and middle managers, managers, managers in charge of managing human resources, managers in charge of offices/divisions etc., chairmen and board members, chairmen and deputy chairmen of Equal Opportunities Committees, NGO project managers, male/female entrepreneurs, and in general for all those who, for various reasons, manage staff and/or work groups within public and private companies.

The course aims to prompt the participants to reflect on the new operational models of company organizations, which allow the enhancement of various professional competences of the entire working staff, in order to foster career advancement and services of excellence at sustainable costs, in compliance with equal opportunities.

There are also some examples in the private sector, such as the "Forum on training and human resources" organized annually by Samedia.

The company is managed and co-ordinated by the Gruppo Editoriale L'Espresso (one of the largest and most important Italian publishing groups), which has been operating for 20 years in vocational training and in the marketing and services area.

The “Forum” is addressed to managers, trainers, human resources managers, national and international experts and opinion leaders.

In 2007 its “Forum”, taking its cue from the European Year of Equal Opportunities for All, focused on the issue of women and the importance of learning and cooperating and recognising the richness of some apparent dichotomies.

In general though, we can say with absolute certainty that most of the training activities addressed to managers in charge of managing human resources do not devote particular attention to the gender issue.

This does not mean that the issues of equal opportunities and conciliation of work and family times is not felt by the Italian training system. Quite the contrary: there is a growing number of courses and masters on the issue. These are usually training pathways that are created under the auspices of institutions and bodies focusing on gender equality and opportunities, women's associations and bodies, universities and research centres. However, the courses are exclusively devoted to the issue of equal opportunities or conciliation of work and family times. The courses do not foresee the insertion of this topic within a more extensive context of the management of human resources or corporate responsibility.

There follows some examples of gender equality training pathways:

- The course: "*The role of public policies on the wellbeing of men and women*". A two-day course held by the Scuola di Formazione Politica Giovanni Ferrara di LeG - *Libertà e Giustizia* in Modena;
- The course: "*Masculinity, society and change*" by CIRSDe - Centro Interdipartimentale di Ricerche e Studi delle Donne - of the Università di Torino;
- The master for newly-graduated women/men: "*Educational policies, women's rights and equal opportunities*", of the Faculty of Education - Università di Firenze. The master aims to train professionals who are able to plan and develop interventions and policies focused on enhancing gender differences;
- Mention should also be made of the "*Course on the antidiscriminatory right*" promoted by the Bar (lawyers' association) of Turin and the Councillor for Regional Equal Opportunities in Piedmont, which is open to anyone, although it gives priority to lawyers and trainee lawyers;



- The "Course on Women, politics and institutions" of the Department of Philosophy of the Università Roma Tre.
- "Change. Roles and forms from a woman's perspective". A workshop of the "teatro dell'anima" ["soul theatre"] proposed by the Scuola di Teatro Maigret e Magritte of Turin;
- The "Guide on gender perspectives in the programmes offered by the Università degli Studi di Torino in 2007-2008 academic year", published by CIRSDe-Centro Interdipartimentale di Ricerche e Studi delle Donne;
- The *Social Theatre* workshop addressed to women who are involved in care-taking work, promoted by the Cooperativa Stranaidea and Acli Colf;
- The specialist course and vocational updating course for trustworthy male/female councillors "Experts in preventing and solving cases relating to sexual harassment and mobbing in public and private work places" of the Università di Verona - Faculty of Law, for graduates and diploma-holders;
- The 1st level master "Women, Culture and Society" organised by the Istituto di Studi Superiori sulla Donna forming part of the Ateneo Pontificio Regina Apostolorum;
- The "Course addressed to technicians for managing a business, focusing on managing shelters, family homes and other structures for housing victims of violence", restricted to unemployed women in the training centre of the Province of Viterbo;
- The updating vocational training course organised by the Università Carlo Bo in Urbino "Policies for equal opportunities, gender and social audits";
- The master for "Experts in promoting Equal Opportunities" organised by the Università di Cagliari; The training pathway for promoting equal opportunities;
- "Women, politics and institutions" organised by the Università degli Studi di Messina, upon the initiative of the Ministry for Rights and Equal Opportunities and in collaboration with the Scuola Superiore della Pubblica Amministrazione (free of charge);
- The workshop organised by ILO - International Labour Organisation - on "Pay Equity";
- The international online course on training policies for women leaders "Leadership in a gender perspective";
- The transdisciplinary course on gender issues promoted by the Università di Bologna and by the Associazione Orlando "Ethics and Politics in the perspective of gender studies. Men and women: passions, visions and practices";
- The seminar "European Structural Funds and the implementation of gender mainstreaming".

### *Training the trainers in Italy*

In Italy, training the trainers does not foresee a well-defined procedure established by law (unless the trainers are professional teachers) and training is carried out both by public and private operators. In fact, the following can conduct training activities for trainers: universities, regional councillorships for vocational training and employment, training institutions, companies, research institutes, trade unions, associations, etc.

Training activities addressed to trainers who are carrying out training activities are promoted mainly by regional authorities.

The training offer is therefore too diverse and complex to be examined here analytically and in a concrete manner. We can therefore affirm that, even in this case, the courses that pay attention to gender issues are more in a class of their own and the majority of trainers who deal with human resources management have only a limited knowledge of the gender issue and of the problems linked to conciliation of work and private life.

## Section B

### *Analysis of the standards used*

The only standard that is officially recognised in Italy (and in the world) concerning the concept of corporate social accountability is the standard SA 8000.

#### The SA 8000 Standard

The international standard SA8000 (Social Accountability) was established in October 1997, based on the directive of CEPAA (Council on Economic Priorities Accreditation Agency), today called SAI (Social Accountability International), and it was subsequently updated in 2001. SAI is a non profit organization whose mission is to make organizations 'socially accountable', uniting together the main stakeholders in order to develop standards which can be used on a voluntary and guaranteed basis. SAI accredits organizations that qualify for certification, it promotes the knowledge of and the understanding of the standard, it fosters its implementation at worldwide level. The body encompasses members representing trade unions, NGOs, associations protecting human rights and children's rights, socially responsible investors and certifying companies.

Compared to the typical ISO norms, with which it has in common the formal structure, SA8000 is a reference point which, due to its very nature, involves the entire company. Its impact and the level at which it acts, compared to other formal norms, requires careful attention and participation by all the stakeholders: the management, top management, staff, suppliers, subcontractors and customers.

The standard aims to globally improve work conditions and to provide an overall norm for all markets and nations, it allows companies to work in parallel with the employment organizations and for human rights at world level and it provides an incentive that offers benefits both to the market and consumers.

The norm foresees eight specific social- and one management-related requisites:

- Child labour;
- Forced labour;
- Health and safety in the workplace;
- Freedom of association and right to collective bargaining;
- Discrimination;
- Disciplinary practices;



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- Working hours;
- Remuneration;
- Management systems.

Two of these eight points, *Discrimination* and *Remuneration* refer directly to the gender issue. In fact, the point *Discrimination* requires that the certified company must not discriminate in gender terms, while the point on *Remuneration* foresees the cancellation of any remuneration disparity between men and women. More specifically, SA 8000 guarantees overcoming discriminations in the area of employment, remuneration policies and, in overall terms, as regards the dignity of all employees.

The enhancement of human capital in order to achieve the development of companies must necessarily take into consideration the diversity between sexes and the requirements that affect performances and working/living together.

Precise indications on the commitment that the company takes against any kind of discrimination are outlined in point n. 5 of the SA8000 which says:

- 5.1 The company shall not engage in or support discrimination in hiring, remuneration, access to training, promotion, termination or retirement based on race, caste, national origin, religion, disability, gender, sexual orientation, union membership, political affiliation, or age;
- 5.2 The company shall not interfere with the exercise of the rights of personnel to observe tenets or practices, or to meet needs relating to race, caste, national origin, religion, disability, gender, sexual orientation, union membership, or political affiliation.

At the same time, the standard is incomplete on the issue of conciliation. Although in the certification process possible measures taken by the company in support of conciliation have been positively evaluated, the standard does not require its presence.

There are other standards which, although they are not exclusively devoted to corporate social responsibility, promote some principles:

- Standard AA1000;
- Standard ISO 26000.

#### Standard AA1000



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Standard AA1000 (or AccountAbility 1000) is a process standard that was devised to measure the performance of companies in social and ethical investment and sustainable development. Introduced in 1999 by ISEA (Institute of Social and Ethical Accountabiliy), with headquarters in Great Britain, the standard was created to allow organisations, which wish to apply it, to promote quality in the processes of *"social and ethical accounting, auditing and reporting"* in order to guarantee the improvement of corporate social accountability. By using the AA1000 standard, companies can demonstrate their commitment in respecting ethical values through objective, impartial and transparent instruments. AA1000 is a dynamic model, which strives to achieve constant and ongoing improvements in behaviours by using a progressive approach that allows its construction over time.

It is broken down into five stages:

- Planning: the values and social and ethical accounting objectives of the organization are defined and the stakeholders are identified;
- Accounting: the scope of the process is defined, information is collected and analysed, the indicators and objectives are identified, and an improvement plan is then drawn up;
- Auditing and reporting: a written or verbal communication is prepared (a report) to be submitted to the stakeholders in order to obtain their approval;
- Embedding: systems are established (management and collection of information, implementation of values, internal audit), developed to reinforce the process and to integrate them in the best possible manner;
- Stakeholder engagement: the organisation remains in touch with all the stakeholders during all the stages of the process.

The benefits that the company derives by applying these standards are above all the consolidation of relations with the stakeholders, improved participation, trust and maintenance of good relations over time. Moreover, there can be an improvement in dialogue with institutions and the public administration, thus reducing conflicts and establishing mutual collaborations and mutual enrichment.

#### Standard ISO 26000

On 26-30 September 2005 the second meeting of the ISO Working Group on Social Responsibility was held in Bangkok. During this meeting important steps were taken towards drawing up a new standard on social responsibility: ISO 26000.

One of the main results achieved in Bangkok was to define a first outline of the document for ISO 26000: the ISO group in fact reached agreement on the structure and overall contents of the standards.

Moreover, the publishing date of a first draft of the standard was fixed for November/December 2007. Unfortunately, to date the draft standard has not yet been published, however a final version is expected to be published in October 2008.

In order to involve those who are interested in the issue of social responsibility as much as possible, the process of defining ISO 26000 foresees the active participation of the representatives of six categories of stakeholders: companies, governments, employees, consumers, NGOs and others.

The future standard satisfies the requirements of the European Economic and Social Committee (EESC). According to the committee's opinion, on the issue of "evaluation and information instruments and social responsibility of companies in a global economy", corporate social responsibility must become a driving force within the framework of a worldwide strategy on sustainable development, and its evaluation instruments will have to respond to the requisites of coherence, pertinence and trustworthiness/financial soundness, by adopting an approach which, although based on universal values, must fully respect diversity.

Contrary to standards ISO 9000 and ISO 14000, ISO 26000 will not constitute a management system and will not be certifiable.



### *Italian agencies for SA 8000 certification*

SA 8000 has met with great interest in Italy, more than elsewhere. COOP Italia was among the first organizations in the world to request certification, back in 1997, thus prompting the certification of many of its suppliers. Moreover, out of a total of 1.461 certified companies in the world (on 30 September 2007), 626 (equivalent to 45%) were Italian.

Another important aspect is that in Italy, in a completely different trend to the rest of the world, mainly medium and small-sized companies request certification, while large Italian companies, although paying attention to the issue of responsibility, are still to a great extent concentrating on communication actions. In fact, if Italy ranks first in terms of number of certified companies, China and India follow in terms of the number of workers involved in the certification process.

Thanks to the success of SA 8000 on the national territory, Italy can rely on 3 accredited certification organizations, which are therefore authorized by SAI to carry out the certification processes:

- CISE (Centro per l'Innovazione e lo Sviluppo Economico) with its headquarters in Forlì;
- RINA (Registro Italiano Navale Group) with its headquarters in Genoa;
- SGS-SSC Italia, with its headquarters in Milan.

It is interesting to observe how none of these organisations have acquired specific competences on gender issues or conciliation.

### *Training of SA 8000 certifiers*

To become SA 8000 certifiers interested parties have to attend a 40-hour training course which is generally run by an accredited certification agency.

The course is addressed to all those who, as independent professionals, or within the framework of accredited certification agencies, intend to carry out audit activities on social responsibility management systems in compliance with standard SA8000. The course provides the expertise to conduct the following audits:

- 1st level audit (within the organisation that has implemented the system);



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- 2nd level audit (relating to the suppliers of organisation that has implemented the system);
- 3rd level audit (by a Certifying Body on the organisation that has implemented the system).

It focuses on the following issues:

- Introduction to social responsibility;
- Standard SA 8000: scope, principles and intervention areas;
- Certification in compliance with standard SA8000.
- The role of the interested parties;
- The management system of social responsibility;
- The SA8000 audit: preparation, planning and implementation techniques;
- Further information on the SA8000 requirements for a possible evaluation;
- Particular issues within the national legislation referring to SA8000 requisites.

The course usually requires a basic knowledge of the SA8000 requisites and of the interpretations contained in the SAI Guidance Document. It uses a highly interactive methodology, based on the analysis of case studies, collective debates, group work, individual elaborations, role plays. However it does not foresee previous knowledge of the gender issue or of conciliation instruments.

### *SA 8000 certification process*

The SA8000 certification process, in a similar manner to ISO systems, can be divided into several phases:

#### 1. The “applicant” status

This is a peculiarity of SA8000 and it is the first approach by an organisation to the SA8000 management system. A form must be filled in and signed by the applicant organization (the form can be requested from the accredited certification body of SAI International). By doing this the company declares that it complies with the national and regional laws. The certification process is thus initiated and the applicant states that it is prepared to receive a first audit within one year (the payment of a down payment is foreseen). When a company acquires the applicant status it is a clear sign of its commitment towards its employees, but also towards its clients and suppliers, who in turn know that they will also have to conform to the SA8000 system. In fact, companies certified to SA8000, by joining the Corporate Involvement Programme, must give preference to suppliers who have applicant status, thus generating a “virtuous” circle for respecting the rights of workers and creating dialogue with social bodies in the territory. In particular, the Corporate Involvement Programme allows the dissemination of SA8000 along the company’s supply chain and it foresees the progress of the implementation process (the suppliers which are undergoing certification) be communicated to the stakeholders through public reports that are verified by SAI.

#### 2. Pre-assessment

The following step consists of an internal re-organisation for achieving the standard. This phase is necessary in order to elaborate all the organisational changes that are necessary to discharge the requisites of the standard. The coordination of the organisation’s internal activities are entrusted to an internal referent who becomes the manager for managing the SA8000. The company in this phase usually uses the services of a consultant with specific professional expertise, who prepares the organisation for the audit by the certifying body. The preparation is finalised as regards all the requisites that are foreseen by the standard. In this phase even the training interventions for company staff and management are inserted. The organization can agree a “pre-audit” with the certifying body, that is an interim audit before the final one, which must indicate non-compliances on which “work” must be done. The objectives that the organization would like to achieve by fully complying with the SA8000 requisites are fixed. If necessary, the applicant status can be renewed and it can last for a total of two years.

### 3. Initial audit and issuance of the certificate

After having done everything that is necessary, as indicated in the pre-audit, the applicant is contacted by the certifying body in order to agree the timing and costs for the second visit. The organism that is undergoing the certification process will have to allow the team that is assigned to the audit (which can be accompanied by an NGO, trade unions or associations to the company premises), to access internal documents and to interview staff. If some non-compliances occur compared to the standards foreseen, corrective actions will be requested. The team of auditors will verify the possible corrective actions that are implemented, and will send the documentation that is collected and its elaborations to the audit committee in the certifying body, which will give its opinion on granting or refusing the certification. The company that is certified to SA8000 must introduce a new management system. This foresees, among other things, the filling in of an appropriate register by suppliers and sub-contractors who commit in writing to comply with the requisites set out by the standard. The organisation can also ask the certification body to carry out audits in its suppliers to verify possible non-compliances.

### 4. Periodic surveillance audits

The SA8000 certification lasts 3 years and surveillance audits are foreseen every 6 months.

### *Analysis of practices*

Besides these standards, in Italy there are other instruments and practices for promoting social responsibility, that is:

- the social audit;
- the gender audit;
- the family and work audit.

### The social audit

The social audit is a complementary document to the financial statements. Besides being a quantitative and qualitative report of the company's activities, it is an instrument that portrays the image of the company (or public body) and its function is more focused on more 'broad ranging' information than that relating merely to the traditional structures of ownership, financial and economic aspects. In particular, the social audit must:

- provide information on the structure of ownership and governance of the company;
- highlight the characteristics of the corporate culture and communicate the system of reference values adopted by the organization;
- portray the company as a body that is useful for society, which operates fully respecting the environment and the expectations of the internal and external interlocutors;
- illustrate the added value it produces and its distribution among those that contributed to the production process;
- emphasise the means the body employs to promote its staff, technological innovation, training activity, hygiene and safety in the workplace, prevention of environmental risks.

In Italy the social audit is a voluntary choice. After the first experiences carried out in 1993 and 1994 by the Ferrovie dello Stato [State Railways] and the Credito Valtellinese [a bank from the Valtellina area], today all large companies, across various sectors, draw up a social audit: Eni, Agip, Enel, Coop, as well as bodies such as the Municipality of Milan.

#### The gender audit

The practice of drawing up a gender audit is very widespread among Italian public bodies. The gender audit is a social audit as it belongs to the same family of audits. It encompasses all the fundamental elements and it satisfies the same requirements: that of informing citizens on whether those who have been given the mandate to manage the body have done so fulfilling what they had promised, and if their work was in compliance with the values which they had declared that they conform to. The gender audit can therefore be a part of the social audit, which reports on the entire activity of the body or it can be a separate document. It can even be an autonomous report which though is part of a series of other documents (for instance, the environmental audit), which are drawn up at different times, but are interrelated. Each of these audits though must be very thorough, for two precise reasons: because each audit must report on the entire work carried out by the Municipality, Provincial Council or Regional Council (and of any kind of public organisation) and therefore it must provide a general overview, although composed of distinct points of view, because citizens must find in these documents, without having to turn to other sources, all the important information which must be presented clearly, comprehensibly and comprehensively. If the gender audit is a social audit, if we want to draw one up the same rules apply. Until a few years ago, each body would choose its own reference model for its social audit. It was a useful phase to experiment in and we could say also to acquire expertise. The risk though is that in the end the social au-

dit is too conditioned, not so much by the numerous methodologies proposed by the experts, as by the different interests of the contracting party. Thus in February 2006, the Department for Public Functions issued the guidelines for the social audits of public administrations, setting out the common rules, outlining what the instrument is, how to compile it, what contents it should include.

It is important to highlight that among these contents is the monitoring of the conciliation policies carried out by the body.

The drawback of the gender audit, and also of the social audit for that matter, is the fact that the gender audit is a statement and therefore a consolidated statement. Its analysis refers to what has been carried out, not what one would like to carry out.

### The family and work audit

This audit was elaborated in Germany in 1995, upon appointment by the Hertie Foundation in Frankfurt, along the lines of the American Friendly Index. Starting from 1998, the audit was adopted as an instrument for implementing family policies by the Austrian Ministry of Welfare and from 2004 it was introduced on an experimental basis also in Alto Adige through a transnational project funded by the European Commission. To date, more than three hundred German organizations, more than 100 Austrian companies and four organizations from Alto Adige have obtained the basic audit certificate. The basic "Family & Work Audit" certificate measures and evaluates the quality of organisational policies addressed to its own collaborators by the company or the body in question.



## POLAND

### Section A

#### *Analysis of training courses addressed to HR managers*

While analyzing offers of training courses or Universities' programs addressed to HR managers in qualitative aspect on Polish market we can say it is satisfying. Those offers can be even better and wider. In 2007-2013 all financial resources from European Social Fund will be assign to Operational Programme Human Capital. The main aim of the Programme is to permit full use of human resources potential through the growth of employment and the increased adaptability in enterprises and workers; to raise educational standards of the society; to reduce social exclusion zones; and to support the building of the State's administrative structures. Within the framework of the Programme the following areas will be eligible for support: employment, education, social inclusion, development of the adaptability of workers and enterprises, as well as issues related to the development of human resources in rural areas, and to the building of efficient and effective public administration at all levels, and to the promotion of health of human resources.

Unfortunately, experts are very skeptical about those trainings. Even if they believe that training courses encompass all actual topics of management of human resources, very often „topic of the training stray from the subject and a trainer is not properly prepared”<sup>1</sup>. Additional problem is provisional character of chosen trainings. According to analysis concerning character and subjects of training in human management, in 1/3 of firms respondents – entrepreneurs in choosing training offers only consider what's on the market, they do not analyze their own training needs<sup>2</sup>. Trainings financed from European funds also do not have the best opinion. There are cheaper but their quality, according to specialists is not high.<sup>3</sup>. Modern training techniques, like coaching – individual process of learning oriented to fast use of acquired knowledge in practice – is also a challenge.

Lack of good in quality trainings courses addressed to managers is not the only problem on Polish training market. There is no objective training evaluation and no ranking of training institutions. Also, companies' owners do not have a point of reference in the area of vocational qualifications of HR managers. In Poland

<sup>1</sup> Polish Association HR Management, *Report „Situation of HRM in Poland 2007”*, Warszawa 2007, s. 38.

<sup>2</sup> Por. tamże, s.38.

<sup>3</sup> Por. tamże, s.38; *Trends HRM. World HRM must learn business language. Discussion with Robertem Reinfussem*, rozm. Ewa Przybińska, Paweł Berkowski, [http://www.serwishr.pl/att/Wywiady/Wywiad\\_z\\_R.Reinfussem\\_cz.2.pdf](http://www.serwishr.pl/att/Wywiady/Wywiad_z_R.Reinfussem_cz.2.pdf).

there are attempts of HR standardization, one of the examples is Professional Education Program carried out by Polish Association for HR Management.

Process of creation of vocational qualification standards for HR managers has started in Poland in 1998. In 2003 Polish Association for HR Management has started their own works on identification of specialists and HR managers competences. They were able to carry out functional analysis of the profession, which was the basis for qualification standards in HR.

“Map of competences in HRM”, was created thanks to the work of the Polish Association for HR Management, which is a method for identification of competences of HR specialists. It allows flexible modification and changes depending on conditions and biznes needs. HR Professional Education Program has started in 2005. In frames of this Program we can monitor offers of universities, different training courses, workshops and other forms of education for HR managers available on the market. HR Professional Education Program also motivates and encourages its participants to lifelong learning and planning of professional career development. For this reason, Polish Association for HR Management, has started work on preparing complex training offer for specialists and HR managers, which is an alternative for post graduate studies.

1000 people has entered the program during two first years of functioning of HR Professional Education Program. Participants of the Program include HR directors, specialists and persons who decide on training and upgrading employees’ qualifications policies. Main idea of the Program is to promote people who care about their own vocational development and qualification raising thru participation in trainings, post graduate studies, workshops and conferences.

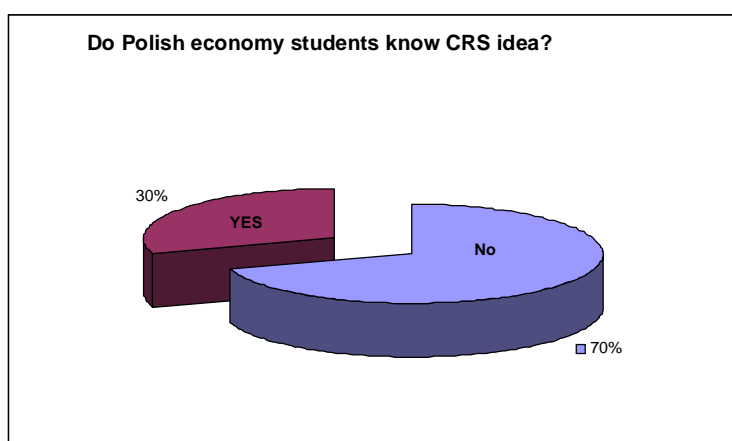
### *Trainings courses for HR managers in Corporate Social Responsibility.*

In 1999 Economy Ethics Team of Institute of Philosophy and Sociology of Polish Academy of Sciences and Leon Koźmiński Academy of Entrepreneurship and Management in Warsaw has established Business Ethics Center (CEBI). CEBI is a research and studies center for Development of this area in Poland and meeting place for business and academic leaders who wants to promote business ethics. CEBI organizes monthly seminars about CSR (over 100 meetings took place already), yearly conferences for scientists, government administration and business representatives, publish books, research reports, science articles. CEBI was also initiator of Polish branch of European Business Ethics Network (EBEN). CEBI cooperates with other

academics centers in Poland and promotes development and improvement of educational and research programs in CSR. It carry out training and guidance for entrepreneurs.

Additionally, there is a number of business schools which included CSR in their programs as academic subject. Over 20 PhD students are preparing doctoral works about different issues connected with CSR. Conferences and academic discussions are organized about corporate social responsibility<sup>4</sup>.

Do Polish economy students know CSR principles? Do they have possibility to learn about CSR on their universities? Do they know firms active in CSR activities? Members of Students' Science Circle for Balanced Development in Warsaw Schools of Economics were looking for answers for above questions in research „CSR in students eyes”<sup>5</sup>. Total number of 1260 students from six cities: Warsaw, Wrocław, Krakow, Torun, Gdańsk and Białystok took part in the research. Almost one fourth of the students were working. Unfortunately, majority of students respondents declared lack of knowledge about CSR idea.



Main source of CSR knowledge for students were: lectures (30% of respondents), conferences and trainings (19%) , media (17%), friends (17%) and Internet (11%). Among respondents who believe that they do not have the possibility to learn about CSR on their university, almost 84% declare willingness to learn about CSR. Almost 90% of respondents believe that there is place for ethics in business and only 1,5% of respon-

<sup>4</sup> *Corporate Social Responsibility in Poland. Introductory analysis*, Warszawa 2007, s. 27.

<sup>5</sup> *Research report „CSR In students' eyes”*, Studenckie Koło Naukowe Zrównoważonego Rozwoju „oikos” przy Katedrze Geografii Ekonomicznej SGH w Warszawie.

dents think that business can not be ethical. According to research, students have problem to describe socially responsible and irresponsible firms. Only 20% of respondents were able to indicate a CSR company and 18,5% - a irresponsible company<sup>6</sup>.

In 2006 students' organization AIESEC has started project „Responsible Krakow”. Aim of the project is to raise awareness of students and entrepreneurs in Krakow about responsible business strategy. In January 2008 they have organized a conference where CSR specialists explained advantages of being social responsible company. They will also organize workshops for students where students will learn practical tools used in implementation of CSR strategy in companies<sup>7</sup>.

Another students initiative was, in 2004, establishment of Science Circle for CSR „BOSS” in Economy Academy in Wrocław. Students promote ethical and responsible activities in business and in other areas. For its members the Circle (BOSSes) organize trainings, workshops, trips, participation in different events. Since 2005 together with Responsible Business League they organize contest „Responsible” which concern CSR. The aim of the contest is to create good image of Polish business. Till 2007 contest task was to create strategy or good business practice for a chosen or invented firm. Winners had a chance to undergo a paid traineeship in chosen enterprises. „Responsible 2008” is directed to two person team who have a task to elaborate in depth study case based on activities of invented local company which uses CSR strategy<sup>8</sup>.

While analyzing trainings addressed to HR managers, we have to notice that in frames of project „Gender Index”, United Nations Program for Development (UNDP) is realizing training initiative in human resources management titled „Management of equal chances company”. According to organizers, it is

the tool to implement sustainable change for support of equal opportunities at workplace. Using this tool can influence increase in number of employers who apply antidiscrimination labour rules and who are aware of relations between economic effectiveness and equal policy in a company. The model is addressed to members of board of trustees, managers, HR specialists, trainers and culture of organization specialists. Those kind of people have real influence on internal policy of a given enterprise. Here we can also include trainers who offer their services in strategic management and human resources development and students of management. The Model consists of several elements. One of them is Audit Equal Chances

<sup>6</sup> Tamže.

<sup>7</sup> Por. Responsible Krakow, <http://www.aiesec.pl/project42/Default.aspx?tabid=13292>.

<sup>8</sup> Por. <http://www.odpowiedzialnybiznes.pl/kategoria-177.htm>.

Company, which is an instrument for internal situation analysis in a company from women and men perspective. In frames of the model there is also a good practice guide „Equal Chances Company” - which presents collection of the best solutions for equal opportunities at workplace. Special training program was elaborated „HR Policy of modern company - management of changes in the context of flexible forms of employment”. Training model „Management of equal chances company” was elaborated and tested. Thanks to this model it is possible to disseminate practical knowledge and concrete qualifications in effective management of diversity at work place. Semester’s course for economic higher institutions “Diversity management in a company” is included in the model<sup>9</sup>.

<sup>9</sup> Por. <http://www.equal.org.pl/baza.php?M=9&PID=88&lang=pl>.



## Section B

### Analysis of standards

Corporate Social Responsibility is a new concept in Poland. We have to remember that in western Europe quality management systems based on norms ISO 9000 are already a standard. In Poland, ISO certificates were implemented several years later. First Polish version of ISO 9001:1994 was issued in March 1996. In 2000 we can speak about boom for different certificates, but still there is a big gap between Poland and western Europe countries. In Poland there are many firms interested in certification with aim to confirm their own quality policy<sup>10</sup>. Sometimes companies are forced to have certification by their clients. There is a famous case of forced implementation of quality management system by TP S.A. (Polish Telecommunication). TP S.A. forced its subcontractors to implement and certify quality management system based on norm ISO 9000 threatening to cease cooperation<sup>11</sup>. Of course, certification in Poland and in Europe is voluntary, but its positive and negative reasons results in dynamic development of Polish certification market. Today norm ISO 9000 is implemented not only by banks, guidance firms and sector ICT but also by public organizations, administration, government units, hospitals, police headquarters and schools.

Nowadays, firms, trade organizations, employers organizations, NGOs, academic institutions and government cooperate together in implementing CSR in Poland in different ways. „Public administration, political leaders, media, representatives of trade unions or the largest employers organizations did not carry out yet any systematic works which could contribute to improvement of corporate social responsibility of Polish economy. Long term planning which is characteristic for CSR is a question of the future. Especially in difficult situation on Polish labour market where many employers fight to survive”<sup>12</sup>.

According to experts, religion is one of the factors supporting social and economic behavior of Polish society. For majority of Polish people is it Catholicism. According to research 15 % of Polish people declare that they are very religious and only 10% think they are not religious or do not give an answer. On rural areas 84% of inhabitants consider themselves religious and only 1% - not religious. For those reasons - according to experts in analysis *Corporate Social Responsibility in Poland* - religion has a big influence on ethics<sup>13</sup>.

First phase of CSR Development in Poland (1997-2000) can be described as phase of silence and lack of interest. During the second phase (2000-2002) CSR raises aversion and sometimes even opposition and ag-

<sup>10</sup> Por. Dorota Kaczyńska, *Certification bodies – report*, <http://www.isowpraktyce.pl/>;

<sup>11</sup> Por. tamże, s. 3.

<sup>12</sup> *Corporate Social Responsibility In Poland. Introductory analysis*, Warszawa 2007, s. 9.

<sup>13</sup> Por. tamże, s. 17.



gression from majority of leaders and economic publicists. Not until years 2002-2004 we can speak of interest for CSR. Years 2004-2005 brought development of this area and first projects. Last two years (2006-2007) is an attempt to connect CSR with others strategies realized in companies - communication, personnel, marketing and corporation order strategies. There were some firms which were leaders in implementing CSR. For example, ABB company which carried out formal dialogue with stakeholders in 2002 or Power Plant Opole which implemented CSR standard SA 8000 already in 2001<sup>14</sup>.

First meeting of Global Compact in Poland - organization convincing firms to support, use and implement in their activities ten fundamental human rights, work standards, environment protection and fighting corruption - took place on April 11 2001<sup>15</sup>. Representatives of business, government and NGOs participated in the meeting. Direct result of the meeting was creation of Steering Committee with international firms operating in Poland and Polish companies as participants. Mission of the Committee is to promote Global Compact principles among Polish companies and engage Polish business in works of the Committee. Global Compact initiative is implemented in Poland thanks to support of United Nations Program for Development (UNDP). On Global Compact web site ([www.unglobalcompact.org](http://www.unglobalcompact.org)) there are 17 Polish members.

CSR is also determined by minimum standards defined in *Tripartite declaration for international enterprises and social Policy* of International Labour Organization MOP<sup>16</sup>. The Declaration was formed in Geneva in 2000 and encourages international companies to solve problems resulting from their activities in different host countries. According to the document, companies operating in a given country should contribute to sustainable employment, provide training according to companies needs and development policy of a given country.

There are also systems supporting management w frames of CSR which can be certified too. Examples of those norms are SA 8000 (Social Accountability International), concentrating on employees rights, human rights and work condition; AccountAbility 1000 - AA 1000, which certifies stakeholders integration in process of sustainable development. New norm is being prepared - ISO 26000 and it should be published in December 2008. This norm was defined as Guidance Document for Social Responsibility (SR). This Document will support development of international agreement about CSR, what it includes and what issues it should support<sup>17</sup>.

<sup>14</sup> Por. tamże, s. 22.

<sup>15</sup> Por. [http://www.globalcompact.org.pl/gcp\\_historia.php](http://www.globalcompact.org.pl/gcp_historia.php).

<sup>16</sup> Por. <http://www.mop.pl/html/index1.html>.

<sup>17</sup> Por. [http://www.globalcompact.org.pl/aktualnosci\\_swiat.php?news=118&wid=2](http://www.globalcompact.org.pl/aktualnosci_swiat.php?news=118&wid=2).

CSR activities are supported also by norms for environment management systems: ISO 14000, EMAS, and certificate Ecolabel.

Standard in preparing social reports for firms are guidelines elaborated by Global Reporting Initiative (GRI), which was established in 1997 as a partnership of Coalition of Environmentally Responsible Economies (CERES) Environment Program ONZ (UNEP)<sup>18</sup>.

**"Business Fair Play"** - the purpose of the program is to promote ethics in business activities, understood as a set of standards of behavior in the mutual relations of entrepreneurs with business partners, customers, employees, and shareholders, as well as the local community, local government and state authorities. It also supports the development of companies by promoting reliable and fair businesses, operating in accordance with the law and ethical principles. The idea of the "Business Fair Play" program is of long-standing tradition. The program was established in response to the competition announced in 1997 by the Polish Foundation for Small and Medium Enterprise Promotion and Development (currently: Polish Agency for Enterprise Development - PARP) for projects concerning business culture promotion in Poland. The project entitled "Business Ethics and Culture in Small and

Medium-Size Enterprises", submitted by the **Institute for Private Enterprise and Democracy** and by the **Polish Chamber of Commerce**, won that competition and was financed by the European Union. As a result of work conducted by the Institute in the years 1997-1999, a paper was prepared, entitled *Principles of the business ethical responsibility* containing among other things case studies illustrating difficult from the ethical point of view situations encountered by entrepreneurs in the course of their work, a code of ethics was developed, and the "Business Fair Play" program was established. Its first edition was conducted in 1998 and was addressed to SMEs; starting from its second edition in 1999 the "Business Fair Play" program adopted a formula open to all enterprises, regardless of the number of personnel employed. In 2008 there will be XI edition of the contest<sup>19</sup>.

More and more attention in Poland is paid to Socially Responsible Investments (SRI). In Poland ecologic investments were initiated by product Energy+, prepared in 2007 by NWA (New World Alternative Investments). This firm is specializing in alternative investments. NWA offers funds Energy+, Climate+ and Climate Core (alternative energy sources-Tarasin New Power Fund and water -Juliusz Bear SAM Sustainable Water Fund). Additional products are offered by Citigroup and Fortis. Presently on the market there are a few products connected with alternative energy sources besides Climate Core and Climate+. According to

<sup>18</sup> Por. *Poor klient can be attractive for a firm*, rozm. z Bolesławem Rokiem, vice president Responsible Business Forum, „Gazeta Prawna”, dodatek „Liderzy odpowiedzialnego biznesu”, 16.11.06, s. 6.

<sup>19</sup> Por. <http://przedsiębiorstwo.fairplay.pl/>.

experts, those types of investments will be more and more popular with time. Those products besides bringing profit also realize important aims for population<sup>20</sup>.

### Analysis of norms

In Poland there are several dozen certification units. Those are organs which carry out certification of compliance. Certification bodies can confirm their competences (accreditation) in Polish Center of Accreditation. Polish Accreditation System is voluntary but very often certification bodies verify its competences in order to issue certificates according to norms. Depending what its certified: management systems, products or personnel, each certification body has to elaborate its own system based on special norms. In February 2007 there was a change of accreditation requirements for certification bodies which verify management systems. Norm PN-EN 45012:2000 and Guide ISO/IEC nr 66:1999 were replaced by norm PN-EN ISO/IEC 17021:2006 (U) *Compliance evaluation - Requirements for auditing units and units in charge of management systems certification*, published in November 2006. The last day to implement norm ISO/IEC 17021 by accredited bodies which certify management systems was on 15.09.2008. After this date accreditations issued by Polish Center of Accreditation are not valid<sup>21</sup>. Specific norms have been fulfilled by bodies which certificate products and personnel.

Norms implemented in Polish companies can be divided into: general and trade. Those general are available for each company regardless of trade and are divided into several categories: quality, safety and health at work, environment and social responsibility. Many of the certification bodies have in their offer certification with environment norms and their competences are confirmed by accreditation and recommendations from companies. However, none of them have accreditation to certify compliance with

norm SA 8000. This fact confirms that in Poland issues of corporate social responsibility are still not common. Few bodies in Poland, especially those international ones, like Bureau Veritas Certification, certify compliance with norm SA 8000.

<sup>20</sup> Por. <http://www.bankier.pl/wiadomosc/Inwestycje-odpowiedzialne-spoecznie-czyli-zielonym-do-gory-1670381.html>.

<sup>21</sup> Komunikat Polskiego Centrum Akredytacji z dnia 13.02.2007 r. w sprawie zasad akredytacji i nadzoru nad jednostkami certyfikującymi systemy zarządzania, wynikających z opublikowania normy PN-EN ISO/IEC 17021:2006 (U), <http://www.pca.gov.pl/doc/komunikaty/KOMUNIKAT-NR-13>.

### *Key features of certification bodies*

According to Artur Świątczak, employee of Bureau Veritas Quality International Poland, certification body should :

- Be independent economic unit,
- Have civil liability insurance,
- Be impartial,
- employ highly qualified specialists, and their qualification should be confirmed by independent institution (for example: IRCA- International Register of Certified Auditors),
- have documented description of certification systems, including rules and procedures of granting certifications,
- have established rules of confidentiality during activities of certification.

According to Tomasz Gasiński, employ of Det Norske Veritas, certification body should have the following key features:

- independence (of the body and its auditors), full independence from clients, financial and organizational independence;
- competences (of auditors in the range of certifications they grant). That's big problem on the Polish market. Clients usually do not ask about auditors' competences, only for prices. In result they can receive very weak quality service which can confirm untruth , for example that weak system fulfill norm's requirement, etc.;
- range of certification services - only a certification or additional added value? Some firm on the market offer only certification, others try to provide the client with some addend value, for example: concentrating during the audit on the most important area and key topics for the client's biznes (for example: DNV, using methodology Risk Based Certification).

### *Territorial location of certification bodies*

Majority of certification bodies is located in Warsaw. There is a total number of 29 units which were verified by Polish Accreditation Center and can certify management systems. 15 of them is located in Warsaw and the rest in Katowice (3), Gliwice (2), Wrocław (2), Krakow (2), Gdynia (2), Gdańsk (1), Lublin (1) and



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Łódź (1). Some of those bodies have branches in other cities of Poland, for example, Bureau Veritas Certification, which divided Poland into four parts, has branches in Warsaw, Gdańsk, Poznań and Katowice. Please see below map to visualize the location.



### *Education of people in charge of certification*

Very often certification bodies carry out training in this area. However, people who are planning to work in this area can finish post graduate studies, for example Jagiellonian University offers Management and Audit major.

ü Graduates of those studies acquire:

1. Ministerial certificate of post graduate studies issued by Jagiellonian University.



2. Certificates issued by Lloyd's Register Quality Assurance, which confirm undergoing and finishing courses:

- Normalization and certification of products and management systems
- Quality management according to norms ISO 9000
- Environment management according to norms ISO 14000
- Safety and health at work according to standard OHSAS.

3. Issued by Lloyd's Register Quality Assurance certificate which confirm undergoing and finishing quality systems' auditors course accredited in IRCA (International Register of Certificated Auditors).

#### ü Forms of courses

Studies are carried out in forms of : lectures, exercises, psychological workshops, design works with the use of creative didactical techniques, computer laboratory. According to studies' organizers particular emphasis is put on practical aspect of problems.

#### ü Program of the studies

| SUBJECT  | NR OF HOURS |
|--|-------------|
| Process of certification and normalization               | 8           |
| Quality management                                       | 12          |
| Environment management                                   | 12          |
| Safety management  | 12          |
| Design of normative management systems                   | 16          |
| Auditing normative management systems (auditors' course) | 18          |
| Internal control procedures                              | 8           |
| Company financial audit                                  | 10          |
| Economic law elements                                    | 8           |
| Information technology management systems                | 8           |
| Organizational changes management                        | 8           |
| Venture management                                       | 10          |
| Time management and techniques of creative thinking      | 10          |
| Psychology of organizational behavior                    | 10          |
| Management sociology                                     | 10          |



|                               |     |
|-------------------------------|-----|
| Culture of organization       | 10  |
| Communication and negotiation | 10  |
| Diploma Seminar               | 20  |
| Total nr of didactic hours    | 200 |

### *Analysis of CSR certification modalities*

We have to remember that corporate social responsibility is a new concept in Poland. Despite this fact, companies and society are getting more aware that firms have to play active and positive role in society. They have to concentrate not only on process and products' and services' quality but also on social and ecologic results of their activities. More and more often is it expected from companies that they will present more detailed and full information about methods of identification and management of risks of social, ethical and ecological character and also describe how those risks influence its short or long-term value. Unfamiliarity with this topic results that firms often elaborate only general declarations, for example: „the company does not tolerate corruption in any form”.

According to research<sup>22</sup>, 50% of Polish firms use CSR strategy of one sort or another. Majority of firms know that they function in environment where all its actors are connected with each other one way or another. Intensive dialogue with stakeholder was observed in 40% of firms-respondents, including - 13% of Polish firms in the sample. In 52% of all firms-respondents communicate with stakeholders in a passive way, and priorities of stakeholders are not identified. Firms seldom feel results of social pressure. In majority of firms qualifications of person responsible for CSR are connected to public relation because CSR issues are part of his department. CSR activities are evaluated by Director for Communication. Only 4 from 40 firm respondents employ a CSR specialist - in one firm He is member of the board.

CSR tools and management systems are used by 20% of firms respondents - only one of them carry its all activities exclusively in Poland. Management by results is usually connected with pro social activities, strategic partnership, and how expectations of stakeholders falls into general management strategy.

Level of CSR tools effects on company goals is connected with level of managers' knowledge about this topic and with creation of CSR department. International Corporation have suitable knowledge, however they seldom use it as a tool to improve effects of firm's activities.

<sup>22</sup> *Corporate Social Responsibility In Poland. Introductory analysis*, Warszawa 2007.

Over 50% of firms respondents do not disclose information about their CSR activities as long as they carry such a activities regularly and according to defined standards. Only 30% of firms including 8 from 21 international Corporation and 2 from 21 large Polish firms not only acknowledge necessity of disclosing CSR information but also is aware of transparent communication about CSR and responds to needs. Those information are tool for motivation and integration of employees around issues important for the company. Among firms respondents, two large companies, Polish and foreign - are preparing CSR reports according to reporting norm defined in frames of initiative Global Reporting (GRI).

Social reporting, both internal and external, is not common and there are no social demands in this direction. Only few reports are published every year - and only small percentage of them is audited by independent organizations.

CSR activities concentrate mainly on programs for society and employees. Very small expectations and demands are connected with certified standards pro environment. ISO 14001 is implemented in over 1000 firms in Poland. EMAS is implemented In only few firms. Specialists who verify EMAS are accredited by independent Polish Center of Accreditation. Thematic internet service of EMAS was elaborated and its includes information for firms. ISO 14001, is a tool generally recognized and it is not difficult to implement. Requirements of EMAS are still to difficult for Polish firms to implement. Both EFQM<sup>23</sup> and SA 8000 have a dozen or so implementations In large companies, Polish and foreign, we can observe that those tools are subject of interest and have slow raising tendency<sup>24</sup>.

### *Spotting and description of bodies in charge of dissemination, sensitization and promotion of CSR<sup>25</sup>*

In the last years enterprises, trade originations, employers organizations and non-governmental organizations, science institutions, governmental institutions in many different ways engage themselves in CRS development in Poland. Here we would like to mention the most important initiatives.

#### Governmental and self-governmental institutions

<sup>23</sup> [http://www.efqm.pl/model\\_doskonosci.php](http://www.efqm.pl/model_doskonosci.php).

<sup>24</sup> *Corporate Social Responsibility In Poland. Introductory analysis*, Warsaw 2007, s. 44-50.

<sup>25</sup> Zestawienie sporządzone zostało na podstawie Roz. „Podmioty promujące CSR w Polsce”, będącego częścią publikacji *Spółeczna odpowiedzialność biznesu w Polsce. Wstępna analiza*, Warszawa 2007, s. 19-34.



Ministry of Labour and Social Policy (MPlPS) has main role in government administration in CSR concept. Member of the Ministry was designated to work in Group of High Ranking for CSR. On this forum, which is a platform for Exchange of experiences, we can find information about accomplishments and plans in implementation of CSR rules in EU member states. National expert was nominated to working group „Mainstreaming CSR among SMEs” in European Commission. In agreement with other government units, information about Polish experiences are collected and put on internet site of KE - in “Employment & Social Affairs and Equal Opportunities”<sup>26</sup>.

In 2006 the Ministry established non formal Interdepartmental Working Group for CSR in order to increase and coordinate the implementation of CSR concept. In April 2007 the Group organized first workshops together with representatives of Responsible Business Forum.

The Ministry also elaborated guide „CSR Implementation Guide . Non-legislative Options for the Polish Government”, which support government administration in preparing basis for public Policy in CSR.

Office of Competition and Consumer Protection disseminate Good Practice Codes. There is also Council for Good Economic Practices. The Office carried out research „Tendency of Polish entrepreneurs to engage in pro-consumer and pro-social activities”.

Campaign, initiated by the Office of Competition and Consumer Protection, is designed to equip the weaker market participants with the information on how to effectively deal with prevalent consumer problems, i.e. how to file a complaint about a defective product, how to spot abusive clauses in a contract with a service provider, how to return an unwanted mail-order purchase or how to avoid spam.

“My consumer ABC” aims at developing consumer awareness in Polish citizens: children, teenagers and adults. The topics addressed during the campaign were selected on the basis of public surveys and analysis of complaints reaching the Office of Competition and Consumer Protection and consumer ombudsmen. The campaign focuses on the following:

1. Safety and quality of goods and services,
2. On-line shopping,
3. Signing contracts,
4. Proper marking of products,
5. Filing complaints about defective goods and services,

<sup>26</sup> Por. [http://ec.europa.eu/employment\\_social/soc-dial/csr/country/nationalprofiles.htm](http://ec.europa.eu/employment_social/soc-dial/csr/country/nationalprofiles.htm).

6. Managing your budget,

7. Fostering sensibility towards promotional and marketing activities of producers

Ministry of Environment. During the period of December 2004 till December 2005. the consortium of LEM-TECH Consulting Sp z.o.o, Royal Haskoning i SEI implemented for the Polish Ministry of Environment two Phare projects "Implementation of EMAS in Poland" and "Promotion of EMAS in Poland".

Under these 2 projects, the following manuals were published: "Wspólnotowy System Ekorządzania i Audytu EMAS -Przewodnik", "Wspólnotowy System Ekorządzania i Audytu EMAS -Poradnik dla administracji", "Wspólnotowy System Ekorządzania i Audytu EMAS -Poradnik dla organizacji", "Wspólnotowy System Ekorządzania i Audytu EMAS - Poradnik dla weryfikatorów". Additionally, a film "Time for EMAS" was produced and a number of EMAS promotion posters and leaflets were published and distributed to interested organizations.

The training was delivered to representatives of the Ministry of Environment, Environmental Departments of the Regional Authorities, Chief Environmental Inspectorate, Regional Environmental Inspectorates and the Polish Center for Accreditation.

In order to prepare a group of EMAS verifiers, 40 environmental verifier candidates were trained and examined under the "Implementation of EMAS in Poland" project.

Additionally, 350 people representing different types of organizations including small, medium and large companies, local governments, municipal service companies and other public institutions were trained under the "Promotion of EMAS in Poland" project.

The implementation of both Projects was completed in December 2005. The Eco-management and Audit Scheme EMAS is the European instrument implemented based on Regulation of European Parliament and Council which encourages different organizations (companies, plants, institutions, etc) to continuously improve the environmental performance.

Having EMAS registration is somehow possessing a trademark which indicates that the organization aims at achieving perfection. The basic principle of EMAS is to distinguish and appreciate these organizations that go beyond the minimum legal requirements and continuously take efforts to improve environmental per-

formance. Therefore, getting EMAS registration means joining "the elitist club" of organizations who continuously aim at minimizing their environmental impact.

### International organizations

- World Bank player important role in development of CSR in Poland in its beginning phase by establishing together with Responsible Business Forum in 2002 first forum of stakeholders for CSR promotion. In the next years WB also supported CSR development by participation in conferences and meetings organization and by first regional research concerning attitudes toward CSR: „What firms' representatives think about Corporate Social responsibility?”.
- International Business Leaders Forum in last years concentrated mainly on certain projects with representatives of business and did not take part in CSR development
- United Nation Program for Development (UNDP) is the most important organization in Poland of this issue. In April 2001, thanks to initiative of UNDP and Responsible Business Forum, Poland become first European country which declared to act according to UN program Global Compact. UNDP initiates many projects connected to CSR in cooperation with other organization, companies and academics institutions.

### Academic institutions

The most important event was opening of Business Ethics Center (CEBI), which was established in 1999 by Economy Ethics Team of Institute of Philosophy and Sociology of Polish Academy of Sciences and Leon Koźmiński Academy of Entrepreneurship and Management in Warsaw.

### Media

Generally speaking, media reluctantly raise CSR issues, concentrating rather on negative aspects of business activities. Situation is surely connected with low level of social trust for business activities and believe that „typical Polish employer is rather not law abiding and is dishonest”<sup>27</sup>

One of the main monthly magazines in Poland „Manager Magazine” has published in May 2007 index CSR for the largest firms in Poland „2007 Ranking of good firms”.

### Non-governmental organizations

<sup>27</sup> B. Roguska, *Właściciel, pracodawca, obywatel – rekonstrukcja wizerunku prywatnego przedsiębiorcy*, [w:] L. Kolarska-Bobińska (red.), *Świadomość ekonomiczna społeczeństwa i wizerunek biznesu*, Instytut Spraw Publicznych, Warszawa 2004, s. 103-131.



- Responsible Business Forum is the first nongovernmental organization in Poland to provide in depth focus on the concept of corporate social responsibility. Forum was established in Warsaw in 2000 as an initiative of Polish businessmen, academics and NGOs. Presently Forum cooperates with 19 strategic partners, first of all with international corporations located In Poland. The Forum's mission is to make the idea of responsible business widespread as a standard in Poland in order to increase companies competitiveness, to satisfy society and to improve the state of the natural environment. Responsible Business Forum organizes yearly Good Business Practice Fair, monitors market, publish yearly Responsible Business Report, carry out research projects, organizes many meetings with business representatives. Since 2000 Forum is national partner of CSR Europe - network of organizations promoting responsible business concept in Europe.
- Academy for the Development of Philanthropy. Established in 1998, its activities are directed to non governmental organizations, civil groups and employers. Its programs are also addressed to self-government, media and public opinion. For 10 years Academy has been carrying out competition for title „Benefactor of the Year”. Award proves recognition of pro-social efforts of the firm; its investment into development of the society and is a gratification for provided assistance.
- Volunteer Centre Association. Every year during Volunteering Gala they present exceptional volunteers, conducts and pro-social actions, good practice, and since 2005 also entrepreneurs and volunteers from firms engaged in issues of local environment. Mission of the program „Corporate Volunteering”, realized since 2005, is to built local partnership between entrepreneurs, non governmental organizations and public institutions thru active inclusion of firms and their employees in local society life. Those actions improve corporate culture, builds their positive image on outside and among employees.
- CentrumCSR.PL - is an independent organization built by individuals wanting to establish a center for disseminating and researching the concept of corporate social responsibility (CSR). The goals of Foundation are: **conducting research and educational activities** in the field of corporate social responsibility; **propagating norms, standards and institutional solutions** aiming at putting into practice the concept of corporate social responsibility; **initiating and supporting actions aiming at establishing the dialogue** among various social groups (*stakeholders*) in the field of corporate social responsibility.

#### Enterprise sector



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- PKPP „Lewiatan”, the most important employers organization concentrates about 3000 firms which employ over 600 000 workers, together in 2007 with Biznes Ethics Center elaborated Employers Ethical Canon<sup>28</sup> - declaration of values which members of PKPP Lewiatan want to realize in biznes. In 2006 the organization accepted „Social Manifest”, In which they declare: „Employers can not only think about incomes. Only social responsible biznes can be sustainable and reliable. Entrepreneurship and social solidarity should not exclude each other. Thru social dialogue we would like to act to such a social model which will give Polish people a chance for better life. This is how we understand our civil mission”<sup>29</sup>.
- Polish Chamber of Commerce is carrying out project „Partnership for *Employment Fair Play* Development. Its promoting entrepreneurship culture and labour market ethics”<sup>30</sup> thru organization of conferences, workshops for enterprises mainly small and medium sized about ethics and responsibility in relations with employees.
- Self-regulation projects. The most evident area of social responsibility in biznes sector in Poland are now trade codes and other forms of self-regulation. In the last three years over 100 such codes were created. Usually they have form of ethics codes, good practice codes, marketing codes, etc.

<sup>28</sup> Por. <http://www.pkpplewiatan.pl/?ID=166147>.

<sup>29</sup> Por. [http://www.pkpplewiatan.pl/?ID=91238&article\\_id=134551](http://www.pkpplewiatan.pl/?ID=91238&article_id=134551).

<sup>30</sup> Por. <http://www.praca.fairplay.pl/>.



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### *Analysis of equal opportunities between women and men*

Poland as a signatory to an Peking Declaration and member of EU is committed to use *gender mainstreaming* rule in all activities undertaken on governmental or local level.

According to research in 1992-2005 period, employment indicators of women were lower by 12-16% than men and risk of long time unemployment was higher for women. Inequality exists also in level of salaries. Women earn about 20% less than men. They also have limited access to trainings and promotion. Women occupy about 30% of managerial positions but among companies' directors and chairmen are only 12% women<sup>31</sup>.

According to research in frames of II edition of contest Equal Chances Company too few Polish firms fulfill European standards in equal policy between women and men<sup>32</sup>. The areas in which women are exposed to unequal treatment: salaries, access to promotion, combining family and professional life, sexual harassment and mobbing. Only 28 % of firms monitor salaries level of their employees. Trainings how to fight mobbing, sexual harassment and discrimination were only carried out in 17% small and medium firms and in 31% large firms. Few women admit that those pathologies exist in their work place. Small firms comparing to large companies seldom introduce a few changes to make work easier for women with children. Quite often companies finance medical care for its employees and their families and vacation for children. Still, employers do not have mentality that effective employee is an employee who has possibility to combine family and work life.

In the contest Equal Chances Company some firms and institutions were awarded for implementation of the most effective solutions in equality between women and men at work place. In this contest equal treatment of women and men is evaluated/analyzed in seven areas of a company activities and which are strictly connected with HR management. Those areas concerned are:

- Employees recruitment,
- Access to promotion,
- Protection from lay-offs,
- Access to trainings,
- salaries,
- possibilities to combine family and professional duties,

<sup>31</sup> *Good practices guide. Equal chances Company*", Gender Index, UNDP, EQUAL, Warszawa 2007, s. 6.

<sup>32</sup> Research results presented on February 6 2008 in Warsaw during conference organized by Polish Confederation of Private Employers „Lewiatan”. Were also Publisher in form of report *Equal chances company 2007 (II edition contest). Research report, EQUAL*, Polish Confederation of Private Employers Lewiatan, Warsaw 2008.

- protection from sexual harassment and mobbing.

Indicator *gender index* was built based on responses from HR departments of firms participating in the contest and employees of those firms.

### *Rewarding for family friendly practices*

Maintaining a balance between work and family life is a condition for protection and development of human capital in a company. Integration of employees and company's goals is a basis for effective

management. Last year Labour Market Institute has carried out contest „Family Friendly Company”. The aim of the contest was to promote companies which implement integration activities and support employees and their families with a special attention to pregnant women and young mothers. The contest was addressed to entrepreneurs from lubelskie region which actively carry out such a Policy in their companies.

The first prize was title of „Family Friendly Company” and distribution of 35 billboards with winner's logo on lubelskie region<sup>33</sup>.

Similar significance has yearly plebiscite „Mother Friendly Company” organized since 2005. Its initiators are monthly magazine „Child” and „House guide”. Awarded employers were open for non standard solutions: flexible working hours, duties negotiations, work time reduction, work at home. Some winners-employers provided financial help for the families, for example offering additional paid maternity leave. Organizers acknowledged practice of setting up a social room for mothers in a company worth dissemination<sup>34</sup>.

<sup>33</sup> Por. <http://www.irp-fundacja.pl/projekty/projekt-006/konkurs.php>.

<sup>34</sup> Por. <http://www.firmaprzyjaznamamie.pl/>.

*Spotting and description of bodies in charge of dissemination, sensitization and promotion of equal opportunities between women and men.*

Gender index<sup>35</sup>

Project financed since 2005 from European Social Fund in frames of IW EQUAL, topic „G“. Several economic units and organizations are involved in the Gender Index: United Nations Program for Development (UNDP) – project’s administrator, Minister of Labour and Social Policy, Main Economic School, Polish Private Employers Confederations „Lewiatan“, Derm-Service Pologne, Foundation Feminoteka and International Forum of Women.

Project concerns labour market and discrimination of women on the labour market. The aims of the project is to elaborate and promote model of effective company management, taking into consideration equal opportunities policy. Gender Index concentrates on biznes environment, carrying out activities which raise awareness of employers about equal opportunities, indicating advantages In using diversity management: wider access to human resources and new talents, increase if company’s prestige, better effectiveness, innovation and motivation of employees.

Indicator *gender index* was created in frames of the project which is to monitor of women and men situation In small and large institutions In private and public sector. Gender index was used in research in 152 firms in I and II edition of contest „Equal Chances Company“.

Civil causes institut<sup>36</sup>

Through realization of the project „Done, paid, worth a lot“ is carrying out information and education campaign about valuing women housework. Realization of the campaign has started in autumn 2000. Its first phase lasted till June 2002, and the second phase has started in 2006. The aim of the project is to publicize problem of unpaid women housework and to pay attention to financial, cultural and social aspects of the problem, and finally improvement of financial situation and social image of women who are housewives. In frames of the projects the following activities are realized: dissemination of publications (posters, brochures, stickers, reports), media activities (TV and radio spots, organization of press conferences), internet service and lobbying.

Web site of the projects: [www.kasakobiet.oai.pl](http://www.kasakobiet.oai.pl).

<sup>35</sup> Project website: <http://www.genderindex.pl/>.

<sup>36</sup> Institute website: <http://www.iso.edu.pl/index.php?page=start>.

### Contest *diversity* - motorola polska<sup>37</sup>.

Since 2000 Software Center of Motorola in Krakow has been organizing contest „Diversity” for secondary school pupils for creation of web site. In 2007 elaboration of English version of web site was included to the contest. Idea of the contest is connected to decision (in 2000) to increase number of women employees working as software engineers in all Motorola branches in the world. VII edition of the contest took place in 2007. 2012 young people participated in the contest. Girls from 250 schools consisted for over half of participants. One of the conditions to take part in the contest is presence of at least 50% of women in design team. Aim of „Diversity” is to brake stereotype of software engineer image and to show that this profession is connected to work fascination and possibility of professional development regardless of gender. Motorola project is connecting two important models in human management: *gender mainstreaming* and *diversity management*.

### Silesia *gender zone*<sup>38</sup>.

„Equality since kindergarten” it is educational project addressed to kindergarten teachers realized by coalition of organizations under management of Association „Silesia Nostra” and non formal group „Silesia Gende Zoner”. Partners of the project are: Social Initiative Development Center CRIS, Social Responsibility Centre and No formal Group of Young Women. Project is realized in Silesia region. The following activities are carried out in frames of the project: workshops dedicated to equality between women and men in context of social rules creation, mechanisms of forming stereotypes and bias and behavior, qualities considered typical for girls/women or boys/men.

Foundation dialogue space is acting for social dialogue, democracy, tolerance, equal chances of women and men, children rights and development of modern culture. In 2007 Foundation together with Friedrich Ebert Foundation have organized workshops „Editorial Equality” addressed to local media representatives. Workshops provided necessary knowledge, qualifications and tools for promoting equality and fighting discrimination. In another project „Pomorze - equality on course!” they promoted good antidiscrimination practices among councilmen in gminas and poviats of pomorskie region. Aim of the project was to improve knowledge, competences and motivation of councilmen in implementation of equality policy and promotion of tolerance and respect in their towns.

<sup>37</sup> Contest website: <http://www.diversity.pl/index.php>.

<sup>38</sup> website: <http://www.bezuprzedzen.org/warsztaty/art.php?art=242>.



# PORTUGAL

## Section A

### *Human Resources Management*

Portugal lies at the end of the EU 15 in most of the ratios related to social development. Education level, lifelong training, productivity, security at work and car accidents are some of the examples. In some of the issues, like education, it even comes behind all the new EU partners.

Considering this particular situation, the internal dimension of FRO is even more important than in other EU countries. There are also huge differences between big and small companies, which aggregate statistics don't show.

Traditionally, some of the big companies offer social services like dining halls, student support and, more rarely, day-nursery services. Sporting groups or associations of employees and ex-employees are also common and the management financially supports some of them.

Most of the few existing Corporate Foundations are destined to support external activities, but a couple of them, like "Fundação Salvador Caetano", aim at support employees and their families.

### *Lifelong Training*

Portugal has a very low education level, by far the worst among EU 25 countries.

In fact, only 20.6% of people between 25 and 64 years of age have completed secondary school. School abandon before completing the compulsory education (9 years) is still very high and recently estimated at about 45%.

Unfortunately, lifelong training has no much better ratios. This factors' conjugation may help, in part, to explain the Portuguese low levels of productivity.

According to the 2001 official report on professional training published by the Portuguese Ministry of Social Security and Labour (MSST), only 17.1% of the companies (excluding micro companies) organized training courses, with an estimated global involvement rate of 18.8%. Training figures are very positively related with company size.

Average training hours per participant was 25.7, and average training cost per participant 279.5 €. Professional improvement accounts for 84% of all company training. Initial training comes second with only 11%.



### *Analysis of Training Course Addressed to HR Management*

In Portugal there are a lot of institutions that offer courses for the HR management, many universities and polytechnics had programs addresses to HR managers. The courses provided by public and private schools and organized in liaison with vocational training centres and private enterprises, for example, APG - Portuguese Association of Human Resource Managers, which promote the trained of the HR managers.

APG is a cultural, scientific and non-profit Association, that join in Portugal persons related to the personnel management and persons that work as Human Resource Directors and Technicians, Personnel Heads, Chief Executives, trainers, consultants and university students from several courses (Management, Work Psychology, Sociology) gathering more than 1500 members. APG has specialised groups of technical and scientific aspects (Trainers Group and Psychologists Group), Regional Groups and Delegates from the north to the south of Portugal. APG's main objectives are to study, develop and transfer the principles, methods and techniques of Human Resource planning, training and management in order to valorise its members; to develop and improve the Personal Function in the organisations; and to study and analyse the social politics, particularly in terms of employment and professional training.

In 2006 the European Commission has approved an operational programme to improve initial and continuing training, human resource management and training in the public services, and raise the number and quality of jobs in Portugal.

The Community part financing will amount to 72.74% of total investment, the remainder being provided by the national, regional and local authorities and the private sector. The European Social Fund (ESF) and the European Regional Development Fund (ERDF) are providing this Community finance. The main schemes under this programme are as follows:

- Sub-programme for initial training and occupational integration: classroom and practical training (approximately 90,000 people); initial training for young people leaving school without vocational qualifications (approximately 76,000 people); measures within the network of "units for integration into working life" (UNIVAS) to provide young people with information on employment.
- Sub-programme for improving the number and quality of jobs: employment promotion by means of recruitment subsidies and start-up aids for self-employment (approximately 283,000 potential beneficiaries); continuing training and staff training support for SMEs (approximately 190,000

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- workers); training for the unemployed (approximately 45,000 people); training for workers who have lost or risk losing their jobs further to industrial change (approximately 18,000 people);
- Sub-programme for human resource training and management: strengthening of training and employment services; development of a training course certification system; monitoring of needs by an employment observatory;
  - Sub-programme for training in the public service: short periods of training for the modernisation of services (approximately 180,000 officials), in particular in connection with the Portuguese regional development plan.

This operational programme forms part of the implementation of the programming agreement (Community support framework) for Portugal (1994-1999 period), concluded between the European Community and the Portuguese national authorities and is designed to contribute to the country's economic development.

Human resource management can include two large areas: personnel management. International environments are changing rapidly. Nothing is permanent, and the cause of yesterday's success may be the cause of tomorrow's failure. Today's leaders must assume the responsibility for creating new models of management systems because many of the assumptions on which management practice were based are now becoming obsolete. Foreign competition and the need to trade more effectively overseas have forced most corporations and government to become increasingly culturally sensitive and globally minded. A rapid technological change has transformed the time dimension of competition development functions.

The training courses for HR managers are: Management careers; Evaluation of Performance; Motivation and rewards and incentives; management of conflicts; training and professional development, safety and hygiene at work; Leadership and strategic management and social responsibility.

Thus, we can say that, until now, training courses addressed to HR management, are mostly promote by, universities, business schools, vocational training centres and some consultants. We underline the role of AESE - School for Management and Business in this issue. AESE is and institution dedicated to the preparation and improvement of business leaders. AESE's mission consists of providing training for leaders of Portuguese companies, advancing their business knowledge and developing their decision making capacity. Programs are structured to encompass objectives such as allowing participants to benefit from them in the long term, the improvement of those around them, and to provide an effective contribution to new challenges facing society.

Thus, the programs are devised by a highly qualified teaching group, from research that has been developed in close relationship with IESE, the Business School of the University of Navarra and with national and multinationals companies operating in Portugal.

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## Section B

### *Standards Used in the Official Management System*

In the table below we can see the management systems standards used in Portugal for quality management systems; environmental management systems and management systems for work environment.

|                                |  |
|--------------------------------|--|
| NP EN ISO 9000:2005            | Quality management systems - Fundamentals and vocabulary                   |
| NP EN ISO 9001:2000            | Quality management systems- Requirements                                   |
| NP EN ISO 9004:2000            | Quality management systems- Guidelines for performance improvements        |
| NP EN ISO 10013:1999           | Guidelines for the Development of Quality Manuals                          |
| NP 4433:2005                   | Guidelines for the documentation of quality management systems             |
| NP EN ISO 14001:2004           | Environmental management systems- Requirements with guidance for use       |
| NP4397:2001 (OHSAS 18001:1999) | Systems for the Management of Safety and Health of Labour - Specifications |
| SA 8000                        | Social responsibility  |
| NP 4410                        | Management System safety and health at work                                |
| NP 4469                        | Social Responsibility Management System                                    |

The ratification of the NP 4469-1:2008 is quite recent, 25<sup>th</sup> of February 2008; it aims to enhance its compatibility with other standards or management systems. Its main aim is to give the organizations some indications in order to establish and evaluate the efficiency producer's focus on guiding organizations towards a construct based on sustainable development and social responsibility, thus introducing policies and aims on reconciliation of work, family and private life.

In fact, company certifications arrived in Portugal at the 90's, initially only in the Quality field.

By the end of 2003, more than 3000 companies had an ISO 9001 certificate. Environment certifications like ISO 14001 arrived in the late 90's, and other standards followed later. Among them, EMAS (Eco Manage-

ment Auditing Scheme), OHSAS 18001 (Occupational Health and Safety Assessment Series), HACCP (Hazard Analysis and Critical Control Points) - mainly used in the food industry - and SA 8000 (Social Accountability).

In December 2002, "Novadelta" (coffee) became the first ever-Portuguese company to achieve the SA8000 certification. This company is recognised by its work to promote and support sustainability practises in East Timor, and considered an international case study in its field of activity. A few other companies are expected to follow "Novadelta" during the next year.

The certification of a Social Responsibility Management System seeks to increase the competitiveness of any organization voluntarily guaranteeing the ethical component of its productive processes, taking into account national legislation and by complying with all regulations dealing with:

- Child Labor,
- Slave Labor,
- Health & Safety,
- Freedom of Association and the Right to Collective Bargaining,
- Discrimination,
- Workplace Disciplinary Procedures,
- Working Hours,
- Wages,
- Management Systems.

### *Organizations dedicated to the Certification of Management Systems*

APCER<sup>39</sup> - Associação Portuguesa de Certificação is a private Portuguese organization dedicated to the certification of management systems, services, products and people as a method of guaranteeing quality and promoting the competitive advantage of organizations, whether public or private, national or international. APCER is the only Portuguese certification entity representing the international network IQNet (*The International Certification Network*), which bestows immediate international recognition on organizations certified by APCER. APCER is able to support its customers throughout the world, in conjunction with the 37 partners of the IQNet network, the world leader in certification with around 300.000 issued certifications and with a pool of more than 10.000 professionals. All are specialized in the audit and certification

<sup>39</sup> <http://www.apcer.pt/index.php?lang=2&PHPSESSID=bffd3daa74d64b51c26a2491e038a376>



of Management Systems across a wide range of reference norms. As a member of IQNet, APCER provides services through more than 200 subsidiaries throughout the world, in various languages, by professionals that are trained and qualified to work in all types of organizations.

APCER offers certification of Social Responsibility Management Systems, in accordance with the SA 8000 norm, established by SAI (Social Accountability International). Through an audit process performed by an external organization, we strive to assure that audited businesses abide by laws and ethical principles throughout their organization, especially in the area of production (the workplace).

Since its foundation in 1828, the **Bureau Veritas Group**<sup>40</sup> has consistently built recognized expertise, helping clients comply with standards and regulations relating to Quality, Health & Safety, Environment and Social Responsibility. In Portugal they are located in the north (Porto) and the centre (Lisbon) of the country.

SGS<sup>41</sup> is the worlds leading inspection, verification, testing and certification company, they have a lot of offices in Portugal, in the North (Porto), in Lisbon, and in autonomous region: Azores and Madeira.

### *Entities Accreditors*<sup>42</sup>

In Portugal the accreditation is the recognition of the technical competence of entities to perform certain activities of conformity assessment. The task of national accreditation body has been exercised by IPQ since its creation in 1986.

On May 31, 2004, with the publication of Decree-Law 125/2004, it created the Portuguese Institute for Accreditation (IPAC) to which is attributed, in isolation, that function.

The system of accreditation operated by IPAC follows the international standard ISO / IEC 17011, and is open, according to a principle equitable and non-discriminatory, to any entity that meets the criteria for accreditation established. The IPAC uses references to international accreditation, in order to facilitate the recognition of external accreditations granted.

<sup>40</sup> [http://www.bureauveritas.pt/homePage\\_frameset.html](http://www.bureauveritas.pt/homePage_frameset.html)

<sup>41</sup> [http://www.pt.sgs.com/pt/contact\\_us\\_pt](http://www.pt.sgs.com/pt/contact_us_pt)

<sup>42</sup> <http://www.ipac.pt/ipac/funcao.asp>



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### *Agencies Responsible for Awareness of the Process of Certification*

In Portugal there are lot agencies, which promote the awareness in the process of certification, the most important contributions belong to:

- an assessment, by the representative of **IAPMEI** (SME Support Institute), of compliance with the legislation relating to business and the viability and profitability of the enterprises;
- an assessment of compliance with the legislation governing cooperative activities, by the representative of the **Instituto António Sérgio do Sector Cooperativo** (António Sérgio Institute for the Cooperative Sector);
- an assessment of compliance with employment legislation by the representatives of **IDICT** (Institute for the Development and Inspection of Working Conditions) and **IGT** (General Labour Inspectorate);
- an assessment of compliance with the legislation governing the activities of non-profit entities, by the representative of the **DGSS** (Directorate- General for Solidarity and Social Security);
- an assessment of compliance with the legislation on advertising and consumers' rights, by the representative of the **Instituto do Consumidor** (Consumer Institute);
- finally **CITE** (Commission for Equality in Labour and Employment).

We also, highlight the role of the following agencies on the certification process:

- Institute for Employment and Vocational Training - **IEFP**
- Portuguese Quality Institute - **IPQ**;
- Institute for Support to Small and Medium-Size Enterprises and Investment - **IAPMEI**;
- General Management of **ICEP** (Institute of Enterprises for External Markets) Portugal;
- António Sérgio Institute for the Cooperative Sector;
- Directorate-General for Solidarity and Social Security;
- Institute for Innovation in Training - **INOFOR**;
- Ministry of the Environment, Town and Country Planning and Regional Development;
- Nature Conservation Institute - **ICN**;
- High Authority for the Media;
- Directorate-General of Public Administration - **DGAP**;
- Portuguese Association of Human Resources Managers and Officers - **APG**;
- Portuguese Management Association - **APM**;
- Portuguese Association of Advertising and Communications Enterprises - **APAC**.

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### *Analyses of CSR - Corporate Social Responsibility*

In the context of the revised Lisbon Strategy, Portugal has been developing a mainstream policy of social responsibility as far as national public policies are concerned. This area is under the responsibility of both the Ministry of Labour and Social Solidarity (MTSS) and the Ministry of Economy and Innovation (MEI). This section outlines the policies promoted by these ministries.

Práticas RS (Social Responsibility in SMEs) is a project developed by Associação Portuguesa para a Qualidade (APQ) and Associação Portuguesa de Ética Empresarial (APEE), in the shape of a protocol between these associations. The Ministry of Economy and Innovation is also a partner in this project. This project is aimed at SMEs, and seeks to promote the awareness of impact of their organisational and business practices on ethics and social responsibility (SR).

The methodology is based on a process of self-assessment of the candidate organisations, followed by an assessor's visit to the organization and feedback, as well as the identification of practices and results for the development of case studies. In the final stage of the project, the global results are presented and the case studies are disclosed, recognizing best practice and the work developed by the company.

In May 2005 a seminar on CSR toward people with disabilities was organized by the National Secretariat for Rehabilitation and Integration of People with Disabilities, under the Ministry of Labour and Social Solidarity, in partnership with the Association GRACE (Grupo de Reflexão e Apoio à Cidadania Empresarial), which was developed mostly by multinational enterprises. The aim of the seminar was to provide concrete examples of good CSR practices towards people with disabilities. Several Portuguese enterprises have taken steps in this direction (such as Portugal Telecom, IBM, BP, Logoplaste and Vodafone). The seminar also highlighted the positive and negative aspects that Portuguese entrepreneurs still perceive concerning the access and integration of people with disabilities into an open labour market; the need to promote the disability issue among enterprises, contributing in that way to a more effective integration of people with disabilities within their permanent staff; and the difficulty that Portuguese enterprises still have in respecting and incorporating social responsibility principles and practices into their business strategies.

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Finally, two important documents were launched: the report of a study on *CSR toward People With Disabilities* carried out between October and December 2004, and the manual *The Integration of People with Disabilities in Enterprises: How to act*,

Some of the large companies are beginning to integrate CSR into their overall business strategies, playing a much more active role in this field and actually committing themselves beyond legal compliance in both environmental and social areas. In those companies, top management, human resources, P&R and marketing are the most common departments in charge of CSR.

In mid 2000, the concept of CSR remains quite unfamiliar to common Portuguese citizens. However, 66% of them think companies should pay more attention to the subject. 20% would recommend a socially responsible company to others, 70% admit that a company's commitment to social responsibility might influence their buying decisions and one third would agree to pay more for an environmentally and socially responsible product.

In January 2003 the Portuguese Social and Economic Council published an important opinion on CSR. For the first time, a CSR Guide containing a list of social responsible companies and a description of their main social and environmental projects was cover story of a national reference business magazine. In May 2003, the “CSR Europe” road show meeting took place, organised by the brand new “Portuguese CSR Association” (RSE Portugal). Throughout the year, around 2 500 people - a real unprecedented figure- engaged in approximately twenty different events and the first few local research on CSR saw daylight.

### *Practice in the field of Family Responsible Organizations*

Since 2000, CITE (commission for equality in Work and Employment) organises an annual award to recognize best practices of companies that promote equality of opportunities between men and women and the conciliation of professional and family responsibilities.

According to its regulations, the “**Equality is Quality**” Award is a prestigious honour promoted by the Commission for Equality in Labour and Employment (CITE), which seeks to contribute to equality between men and women at work, in employment and in vocational training and to promote reconciliation between work and family life.

The priority laid down for the award is to recognize and reward enterprises and other employers for implementing good practices in promoting gender equality. The award is also an instrument for promoting corporate social responsibility, promoting gender equality, creating awareness of this equality, and fighting segregation in the employment market. The award's objectives therefore involve reducing the gap between male and female unemployment rates, reducing salary inequalities, improving working conditions and changing the culture of organisations so that equality and reconciliation become two of their basic elements.

The "Equality is Quality" Award thus seeks to highlight the contributions of companies and organisations that take or promote positive measures aimed at gender equality and quality at work, in employment and in vocational training. This is achieved by publicising exemplary cases and measures and raising awareness among other companies and consumers of the importance of implementing specific measures to promote gender equality and reconciliation between work and family life.

**Examples of the best practices in organizations that have received The “Equality is Quality” Award**

- |   |   |
|---|---|
| 1. Caixa Económica Montepio Geral                                     | 13. EBAHL – Equipas dos Bairros Históricos de Lisboa  |
| 2. Tavares de Oliveira  | 14. Grafe   |
| 3. RTP – “Confatra” project   | 15. Farmácias Barreiros                               |
| 4. Heska  | 16. Caixa de Crédito Agrícola Mútuo de Mafra          |
| 5. Salvador Caetano, SA   | 17. Nestlé Portugal, SA                               |
| 6. A. Silva Matos Metal-Mecânica, SA                                  | 18. Texto Editora, Lda.                               |
| 7. TAP- Transportadora Aérea Portuguesa                               | 19. Espaço T  |
| 8. Sociedade de Aparelhos de Precisão Bruno Janz, SA                  | 20. Luízes Representações                             |
| 9. Cooperativa Agrícola de Reguengos de Monsaraz                      | 21. ADE – Associação para o Desenvolvimento e Emprego |
| 10. RES – Prestação de Serviços Comerciais                            | 22. Friedrich GROHE                                   |
| 11. Opel Portugal, Comércio e Indústria de Veículos, SA               | 23. Oracle  |
| 12. Serviços Municipalizados de Água e Saneamento da C. M., de Loures | 24. IBM   |





Every year **School for Management and Business (AESE)** in cooperation with Deloitte promote the award for the most family friendly company.

AESE<sup>43</sup> – School for Management and Business is an institution dedicated to the preparation and improvement of business leaders. At AESE, Programs, Seminars and Continuous Education Programs establish discussion groups, generation of communication and ideas, and tools of business relevant to the effective management of organisations and companies. Their mission consists of providing training for leaders of Portuguese companies, advancing their business knowledge and developing their decision-making capacity. Programs are structured to encompass objectives such as allowing participants to benefit from them in the long term, the improvement of those around them, and to provide an effective contribution to new challenges facing society.

The **Great Place to Work Institute Portugal**<sup>44</sup> is another organisation that promotes the awards; they help companies improve corporate performance and raise the quality of work life for their employees. The 2007 list of the 25 Best Companies to Work For in Portugal was selected by the Great Place To Work® Institute Portugal.

In April 2003, the business Magazine “Exame” published a “**Guide of Socially Responsible Companies**”. The guide included a CSR Top 10, followed by individual reports on CSR policy, social and environmental activities of each of the chosen companies. The candidates had to fill a form prepared by “Ethos”, a Brazilian institute. A jury of six people analysed the results, along with the description of the social projects in which they were involved. It also included interviews with members of the jury and a comprehensive list of 37 relevant corporate social projects.

#### List of CRS top 10:

Auchan

IBM

Novadelta

DHL

HUF

Hewlett-Packard

British Petroleum

Xerox

Simens

Somague

Source: “Exame”, magazine, April 2003

<sup>43</sup> [http://www.aese.pt/AESE\\_C00.aspx?cmnu=Root\\_AESE&cat=Root\\_AESE\\_QuemSomos&lng=01](http://www.aese.pt/AESE_C00.aspx?cmnu=Root_AESE&cat=Root_AESE_QuemSomos&lng=01)

<sup>44</sup> <http://www.greatplacetowork.com/best/list-pt.htm>



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The IDICT (a public body depending on the Ministry of Social Security and Work and dedicated to the development and inspection of the labour working conditions) launched in 2003 an annual award named “**Prevent More to Live Better in the Workplace**”. The aim is to give public recognising to organisations and individuals that in each year distinguished themselves in the domains of innovation and best practices in the promotion of better working conditions and working accidents prevention.

Every year, through the **Employment and Vocational Training Institute (IEFP)**, the Ministry of Labour and Social Solidarity (MTSS) promotes the following awards:

- A **merit award**, for the employers in the private, cooperative and business sectors, as well as local authorities and public bodies not falling under the central administration, that have most distinguished themselves in entering into indefinite-term labour contracts with disabled people, and for disabled people who have distinguished themselves in setting up in self-employment;
- The **Manuel Lopes award**, to the individuals and legal persons that most distinguish themselves in implementing and disseminating good practices in relevant fields for the improvement and innovation of collective recruitment (this involves issues such as making work decent and improving the conditions under which it is performed);
- The **Agostinho Roseta award**, for individuals and legal persons that most distinguish themselves in implementing and disseminating good practices in fields relevant to the improvement and innovation of collective recruitment (for example making work decent and improving the conditions under which it is performed), and for increasing the social dialogue, or pursuing research works and studies on these matters.

### *Projects Developed in Portugal for Reconciliation of Work, Family and Private Life*

The projects developed in Portugal based on the problematic of reconciliation of work and family are mainly developed by universities and study centres. Although, there are a lot of important projects developed by some organizations, we underline the contribution of *Equal* and *Associação Mulheres em Acção* (Association Women in Action) on this matter.

Furthermore, **ANJAF**<sup>45</sup> developed a project called **Reconciling Work and Family Life**; the main goal of this project was to achieve an effective balancing between family and work life, with the essential support of the implicated economic agents, enterprises and companies.

<sup>45</sup> <http://www.anjaf.pt/en/projecto.php?projectoID=10>



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The lead lines of the project were:

1. Establish a Model of Maturity for Family Responsible Organizations (FRO)
2. Develop public recognition promotion measures for the FRO
3. Create a network of employers and reconciliation experts.

We also developed the **Conciliarte Project**<sup>46</sup>, the major objective of which was experiment new work organization models, promoting the development of new ways of labour organization for companies and social economy organizations, of the Santarém and Peniche areas. Furthermore, the project indented the development of strategies of articulation between work and family, especially, cases of personal or family need, such as caring for dependents (elderly, children or special needs); it also viewed the creation of a network of employing entities, enterprises, unions, family associations, as conciliations facilitators or “reconciliation friends”.

Another project developed by ANJAF, intended for the promotion of conciliation between family life and professional activity, resulted in on one “Oeiras’ Recommendation”. This recommendation was produced on the scope of the “**Conciliar**<sup>47</sup> **é Preciso**” project. In this recommendation the “heads” of national and international partners of the project recommended a set of measures of positive actions, aimed at all citizens, public authorities, employers, employing organizations and unions, and non-governmental organizations, among others, and engage themselves to contribute to its achievement within their own competence scope.

Therefore, ANJAF conceptualized a model of family-friendly enterprises, an instrument for improving organization management, in what concerns reconciliation of family life and professional activity. By establishing the requirements of a Management System for Family Responsible Organizations (FRO), this reference system is a precious help for companies that are already establishing good practices in this area and that besides finding here a set of requirements also find a guide for a more systematic implementation of their practices.

As a management reference system, it has a structure compatible with the norms for management systems already in use, namely NP EN ISO 9001:2000, NP EN ISO 14001:2004, OHSAS 18001:1999 and SA 8000:2001. Considering that the reference system’s requirements and structure will be auditable, it is also a goal that it may be used to certify the organizations that may wish to do so. The Evolutional Model of the Family Responsible Organizations is an evolutional and scheduled model of maturity for the Family Responsible Organizations (FRO) that will allow companies to self-evaluate regarding the organization’s currently used practices and corporate responsibility in terms of reconciliation.

<sup>46</sup> <http://www.anjaf.pt/en/projecto.php?projectoID=9>

<sup>47</sup> <http://www.conciliar.net/>



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The ***Todo o Terreno*** project, started in 2001, is a public-private development partnership that aims to achieve better efficiency in actions to prevent social injustice and exclusion. It is an extraordinary example of how private companies may and should participate in the increase of justice and solidarity. At the same time the project has cooperation (signed agreements) from the Regional Board of Education and the Portuguese Association for Companies Social Responsibility. The general goals of the project are to:

- a) invite the community in general to reflect upon the importance of social responsibility
- b) make the different target publics more sensitive to the adoption of socially responsible practices to create quality and active citizenship.

***Ser PME Responsável*** is a partnership project which aims to incorporate and integrate CSR practices among SMEs. To achieve this goal the project has set objectives to:

- a) develop a methodology to identify, integrate and value CSR practices
- b) implement this methodology in the promoters and in a small group of SMEs, to test it and to use these exemplars as 'best practices'
- c) develop a benchmarking system for CSR
- d) develop a virtual community of practices
- e) train trainers and consultants on the methodology and on CSR themes
- f) To develop information and communications aimed at SMEs about this issue.

***Diálogo Social e Igualdade nas Empresas*** is a project developed by a partnership that includes nine organisations. The main issue is reducing gender gaps and supporting job desegregation, and the main actions are the creation of instruments to promote gender equality and work-family balance within enterprises; encouragement of good practice within enterprises; development of instruments for gender equality auto-validation and monitoring for enterprises; and the development of strategies and tools to support gender mainstreaming within the context of CSR. Developed by CITE.



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## Measures to promote reconciliation between work and family life: working hours, leave of absence and special facilities

### *Time management, working hours and flexibility*

Time management is particularly relevant in modern societies and is of critical importance for tackling the issue of reconciliation between work and family life. Therefore, an organisation that enables its employees to manage time in a manner that does not prevent them from fulfilling their family

responsibilities and in which the employee is not disadvantaged in terms of his/her occupation, can be considered a good example.

In a significant number of organisations it is also possible to accumulate hours worked. This is an interesting measure, which can contribute to improved reconciliation between work and family life.

The possibility of homeworking is almost non-existent, for instance, some studies estimate that teleworkers are about 1.5%/ 2% of population, and most of them are informal workers<sup>48</sup>. It was used in only two companies, although others use it as an occasional solution. The following examples illustrate good practices for promoting flexible forms of work:

**GRAFE** (informal flexibility) working hours at GRAFE are from 9:30 a.m. to 6:30 p.m., and have recently begun to be recorded automatically. However one of the innovative aspects of this company is flexibility of working hours. Since the company's management considers that rigid working hours are not conducive to creative work, most of the company's male and female workers work flexible hours.

**ADE**, this association envisages various forms of flexible working hours: jobs without pre-established working hours, oriented towards meeting objectives; telework/homeworking; rotating shift work agreed between the workers and the employer informal facilitation to deal with personal and family responsibilities; a time bank: the option for employees to compress their working time into fewer weekdays, to accumulate overtime hours worked to gain rest days, or to make exchanges with other employees in compatible positions; and flexible starting and finishing times.

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<sup>48</sup> Rebelo, 2002.



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### *Reconciliation support services and facilities*

One of the services most frequently provided by the various organisations is a cafeteria serving meals at low prices. Sometimes the cafeteria can also be used by family members. This is viewed by employees as an important advantage and this facility is especially made use of by employees' children during holidays.

A few companies have a kindergarten or agreements with kindergartens and/or play centres. This is a best practice for promoting reconciliation between work and family life. A smaller but significant number of enterprises provide transporting, e.g. a company bus, thus reducing travelling costs and simplifying the potentially time-consuming daily journey to and from work for all employees.

Some organisations, particularly those of a significant size, organise leisure activities for workers' children, e.g. holiday camps, thus simplifying childcare problems in school holidays. In many cases, activities are organised on a more occasional basis, such as visits to the company, parties and there are also situations where the company considers granting an allowance for the purchase of school equipment for workers' children, or even donates school materials. Finally, another service provided by some organisations is related to healthcare. It should be noted that, in a significant number of cases, the organisation has a doctor and offers health insurance that frequently extends to family members.

### *Flexible work organizations*

Companies that adopt measures for reconciling work and family life seek to adapt forms of work in order to meet their employees' needs. This leads to greater levels of satisfaction amongst staff and to optimisation of the company's human resources. This in turn helps to improve the quality of the work and services provided and thus the quality of the company as a whole. Among the range of measures that can be taken in order to make work more flexible we find:

1. Actually reducing the number of hours worked, so as to create a better balance between work and family life.
2. Adjusting and improving the flexibility of work hours by negotiating a minimum number of hours to be worked each year, or creating "time banks". Rather than complying with a rigid work schedule, staff should be responsible for achieving objectives;
3. Compressing working hours into a shorter week so as to increase the number of free days available for rest and family life.



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4. Adopting teleworking practices, particularly for staff who live a considerable distance away from their workplace,

Examples of good practise:

**Bruno Janz** - a company that produces precision; **Caixa Económica Montepio Geral**; **Salvador Caetano**, a company in the car industry; **Tavares de Oliveira**, a tax consultancy firm; The telecommunications company **Portugal Telecom** (PT); The IT Company IBM also promotes teleworking and provides staff with a laptop computer and Internet access; The electricity company EDP - **Electricidade de Portugal**; The textile company **Silva e Sistelo**; **PROCAL**; **PLASTIDOM**, a plastics manufacturing company, and finally **Heska Portuguesa**.

### *Incentives for fathers to participate more in family life*

In Portugal, as in other countries, men generally work full-time and continue to make little use of family support leaves. However, some recent studies have shown that the younger generations of men tend to play a more active part in bringing up their children.

Companies that implement policies for reconciling work and family life should provide an organisational culture which recognises the importance of the father's role in children's socialisation, and which urges men to take advantage of the specific forms of leave that have been created for working fathers. In doing so they must also guarantee fathers that they will keep their jobs and that the promotion and bonus system will continue to apply to them.

Companies that have adopted such best practices state that male staff who take the various types of parental leave available to look after their young children, improve their performance at work. They become more active and collaborative, which in turn creates a friendlier working environment.

A few countries have adopted good practices to encourage fathers' participation in family life, which include creating schools where men specifically learn to look after children. Such initiatives should be preceded by awareness-raising actions, so as to do away with prejudice and change attitudes and practices.

For example, in Portugal IBM has been trying to increase fathers' roles by internally publicising accounts written by male staff who have small children and share the work of looking after their families. Working fathers at *Caixa Económica Montepio Geral* have taken unpaid leave to look after underage children, in accordance with the current law on the protection of maternity and paternity.



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### *Care services for the elderly*

The rising number of senior citizen who are dependent on workers and the need to provide them with special care can raise difficulties when it comes to reconciling work and family life.

In such cases it becomes crucial to create care services, but also to make it possible for both male and female workers to adopt working arrangements that make it easier for them to support elderly family members.

The move towards the creation of home services and the existence of proximity care services for senior citizen, with which employers enter into preferential agreements for the provisions of this type of support to their staff, are measures which should be encouraged in companies.

Example of good practice: the IT Company IBM provides health insurance not only for its staff and their children and grandchildren, but also their parents and grandparents. Many of the company's employees take this opportunity to give added support to their parents.

### *Parental leave for working fathers and mothers*

Any policy for reconciling work and family life should ensure that working parents are entitled to time off in order to take care of their family.

It is important to note that a balanced distribution of family support leave between women and men makes it easier for the former to take on professional responsibilities and secure career advancement. It can also attenuate the culture of the "total availability" which often men are supposed to display in some workplace and which often almost precludes their "right to a private life". At the same time it avoids marginalising the father's role in bringing up the children and ensures that the latter enjoy their right to be cared for by, and establish bonds with, their father.

With a view to implementing measures to improve balance between work and family life, some companies go beyond the legal requirements and either on their own initiative, or via collective bargaining, give their staff family support leave for longer periods than those laid down by law.

In addition to the extension of compulsory family support leave, there are other examples of measures that represent improvements to existing arrangements. Some of the most important include: not reducing an employee's salary in any way; maintaining the right to promotions and to keeping the same job; allowing staff the right to shorter working hours in order to breastfeed children and care for them in other ways in the period immediately following their birth; and allowing staff to work flexible hours in order to care for their children.



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# SWEDEN

## Section A

### *Gender Equality training*

The target groups for FRO Curriculum are teachers and trainers but the beneficiaries are Human Resource Managers (HR managers) and managers of SMEs. This section therefore gives a brief description of training offers for all these groups. In Sweden there are a wide variety of training courses in gender equality offered by universities, university colleges, private training companies, adult educational associations, social partners, and public authorities. But gender equality training is still often tailor made for the involved organisation or organisations and often carried out by consultants, which makes it difficult to access the content. Even though training in theory is open to managers in SMEs the courses often use theories and practices based on research and experiences mainly in large organisations. Some training (formal or informal) is offered through specific projects focusing on gender equality in SMEs and/or within the framework of Swedish clusters and innovation systems.

Universities and university colleges offer courses ranging from 7.5 ECTS to Master's Programme in Gender Studies. This report presents courses that require no prior undergraduate studies.

Several universities have courses that introduce gender analysis with a broad perspective on working and family life. One example is *Gender and Society in Theory and Practice*, 7.5 credits at Växjö University, covering areas such as family life, conditions for children and young people, unpaid work and equality on the labour market. Another example is *Leadership and Gender*, 7.5 credits at Gotland University, introducing a gender perspective in relation to the individual, the group, the organisation as well as our perception of femininity and masculinity in organisations.

Specific courses focusing on gender equality in working life are also available at several universities<sup>49</sup>. One example is *Work Science - Equality and Diversity in Working Life*, 15 credits at Halmstad University, where working life is analysed from gender equality and diversity perspectives. Another example *Gender theoretical Perspectives on Discrimination at the Workplace*, 15 credits at Malmö University, where processes that shape and reproduce inequalities are studied.

Gender equality perspectives are also an integrated part of courses focusing on HR

<sup>49</sup> Courses covering legislation within the field of equal opportunities in working life, requires prior undergraduate studies as well as some of the courses that are part of for example a master program.



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management, organisation theory and leadership. One example is *Human Resource Management and Administration in Working Life*, 15 credits at Dalarna University, where the work with HR management and administration are related to changes in society and perspectives such as internationalisation, globalisation, flexibility, diversity and gender. Another example is *Organisation Theory and Leadership*, 7.5 credits at Kristianstad University, providing skills in order to access the organisation from a gender perspective. Some universities such as for example Malmö University aim at integrating gender and diversity perspectives in all their courses.

Some universities also offer tailored vocational training courses focusing on gender equality to companies and public organisations such as for example *Gender Equality Education for Managers* at Karlstad University. The Swedish National Defence College offer gender equality training, *Equality, Doing and Learning*, providing basic skills in abilities to discuss, work with and develop equality. The training was originally developed within the framework of the Community Initiative Equal and is open to managers, leaders, decision makers and employees from both public and private organisations, including companies. The College also offer training for trainers/instructors in gender equality that would like to carry out the basic training programme. Courses offered by private training organisations often focus on the Equal Opportunities Act (see section 3), legislation in working life and/or development of gender equality policies. One example is the *Certified Gender Equality Education for Managers* offered by the Business Leadership Academy. The overall aim of the education is to increase the participants knowledge about the Equal Opportunities Act and obligations as an employer and managers, provide them with tools to implement the knowledge in a professional way and produce action plans for the gender equality work in the managers own organisations. The Swedish Association of Human Resources Management offer a process oriented education in gender equality and diversity aiming at drawing up a policy and integrate these perspective into management systems. During the course material from a Swedish TV series called *Jobba Jämt* ("Equal Work") is used.

Swedish Adult Education Associations<sup>50</sup> are also having courses in gender equality with relevance for working life. Traditionally courses are carried out as "study circles" i.e. a group of people who meet regularly and study together. One of the group members act as a circle leader but all participants experience and knowledge are acknowledged as valuable. "Experts" can also be invited to the circle. If a group of people for example are interested in starting a study circle focusing on FRO one of the adult educational associations could support such process.

Folkuniversitetet ("Peoples University") is an educational association with regional offices attached to the Universities of Stockholm, Uppsala, Gothenburg, Lund and Umeå. The association offer courses for companies that need to have an equal opportunities plan according to the Equal Opportunities Act in Sweden.

<sup>50</sup> A short presentation of the adult education associations, see Annex 3



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The aim of the course is to give participants basic knowledge about policies and legislation, and how to draw up, follow up and evaluate the plan.

SENSUS is another association offering courses in diversity and gender equality in working life in order to increase knowledge and counteract conditions, structures, norms and attitudes that reproduces inequalities.

The Folk High Schools<sup>51</sup> sometimes also offer courses with links to gender equality in working life and training of trainers/instructors in gender equality. "Kvinnofolkhögskolan" (Women study Centre) for example offer courses in gender pedagogy for trainers/instructors/circle leaders.

Public authorities also offer gender equality training and one example is the training sometimes offered by experts at the County Administrative Boards. This training is usually a part of different regional projects aiming at gender equality in organisations and often target managers in the public sector, but sometimes also in private companies. During the period 200-2006 several large scale programs were financed by the European Social Fund, Objective 3. One example was GenvägSörmland ("Short cut Sörmland") co-ordinated by the Board in Södermanland that offered competence development in gender management for companies and seminars for HR managers.

The Board in Norrbotten has co-ordinated a project for gender equality in working life for organisations in the county with process oriented education which resulted in a method handbook. Other regions such as Gävleborg and Skåne have worked with similar approaches and these programs also attract SMEs. The Board in Jämtland has developed a special gender equality label for companies and organisations (see section 5) and the Board in Stockholm supported the development of the *Certified Gender Equality Education for Managers*, mentioned above. The Board in Uppsala and the Regional Resource Centre (RRC) for women are involved in a project focusing on sustainable leadership covering gender equality and CSR.

Trade unions and employers associations also offer courses on collective agreements and gender equality as well as the Equal Opportunities Act.

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<sup>51</sup> A short presentation of the folk high schools, see Annex 3



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## Section B

### *Official standards with relevance for management systems*

In terms of official management systems standards used in Sweden these mainly relates to quality systems, environmental systems and work environment. These standards are listed below. But there are also standards for areas such as Competence management systems and Value Management.

“Certification” of standard for quality management systems is done according to ISO as follows:

- ISO 9000:2005 Quality management systems - Fundamentals and vocabulary Sweden's County Administrative Boards are functioning as representatives of the Swedish Parliament and the Central Government at regional level, for example promoting equal opportunities between women and men.
- ISO 9001:2000 Quality management systems - Requirements
- ISO 9004:2000 Quality management systems - Guidelines for performance improvements
- ISO 10005:2005, Quality management systems - Guidelines for quality plans
- ISO 10015 Quality management - Guidelines for training
- ISO 10019:2005, Guidelines for the selection of quality management system consultants and use of their services
- ISO 19011:2002 Guidelines for quality and/or environmental management systems auditing
- “Certification” of standard for environmental management systems is done according to ISO as follows:
  - ISO 14001:2004 Environmental management systems - Requirements with guidance for use
  - ISO 14004:2004 Environmental management systems - General guidelines on principles, systems and supporting techniques
  - ISO 14015 Environmental management - Environmental assessment of sites and organizations
  - ISO 14050:2004 Environmental management - Vocabulary
  - ISO 14063:2006 Environmental management - Environmental communication - Guidelines and examples
- ISO 19011:2002 Guidelines for quality and/or environmental management systems auditing

“Certification” of management systems for work environment is done according to the “Provisions of the Swedish Work Environment Authority on Systematic Work Environment Management (AFS 2001:1)”, often in combination with management systems for quality and environment. Certification is also done according to international standards for Occupational Health and Safety Management Systems:



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- OHSAS 18001:2007 Occupational health and safety assessment series Occupational health and safety management systems - Requirements
- OHSAS 18002 Occupational health and safety management systems - Guidelines for the implementation of OHSAS 18001



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### *Organisations responsible for standardisation and certification*

The responsible authority for standardisation and supreme body for the Swedish standardisation system is the Swedish Standards Council<sup>52</sup>. Members of the Council are the government, Swedish Association of Local Authorities and Regions, Confederation of Swedish Enterprise, Swedish Trade Federation and Swedish Bankers' Association.

The Swedish Standard Institute<sup>53</sup> is recognised as a standard body with membership in ISO and CEN (European Committee for Standardization). It is the centre for work on standards in Sweden and covers besides leadership and management systems areas such as building and construction, health and medical care, consumer products, materials technology and mechanical technology.

SIS is a member-based non-profit association with approx. 1450 member organisations. In cooperation with Brazilian Association of Technical Standards SIS provide the joint leadership of the ISO Working Group on Social Responsibility drafting an International Standard that will be published in 2010 as ISO 26000.

Certifications of standards are carried out mainly by organisations located in Sweden<sup>19</sup> and approx. 10-15 has accreditation for the management systems.

The Swedish Board for Accreditation and Conformity Assessment<sup>54</sup>, a public authority under the Ministry for Foreign Affairs, is the national accreditation body, assessing the competence of certification and inspection bodies. They also give personal accreditation for environmental auditors and work environment auditors. Besides their own staff they use over 200 external technical experts as assessors.

### Training

SIS Forum AB is a wholly-owned subsidiary of the Swedish Standard Institute offering training in management systems for quality, environment and work environment. The company also offers training in line with the forthcoming ISO 26 000. The content of the training covers aim and objectives of the management system, integration of management system, aspects connected to equality, environment and/or work environment, development of a management system, tools for continuous improvement, and activities to create an effective management system. Training courses are offered for internal auditors - basic skills as well as further training - which often require that the participants have prior knowledge within the field of environment, quality and/ work environment as well as knowledge about the relevant legislation.

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<sup>52</sup> [www.svenskstandard.se](http://www.svenskstandard.se)

<sup>53</sup> [www.sis.se](http://www.sis.se)

<sup>54</sup> [www.swedac.se](http://www.swedac.se)



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Organisations that are accredited for certification often offer training in the standards used in Sweden as well as specific courses for internal auditors. Training is also offered by training organisations as well as consultants. Tailor made approaches for training are available for SMEs.

### *Legislation and collective agreements*

#### Legislation

In Sweden the Equal Opportunities Ombudsman<sup>55</sup> is responsible for overseeing compliance with the provisions of the Equal Opportunities Act<sup>56</sup> and also has the right to bring an action under the Parental Leave Act<sup>57</sup>, which prohibits unfair treatment of employees in connection with parental leave. From 2009 and onwards this will be changed due to a new single Anti-Discrimination Act that will cover different grounds of discrimination.

The current Equal Opportunities Act prohibits sex discrimination in the labour market and requires that all employers, whether in the public or private sector, shall actively promote equal opportunities for women and men in the working environment. Employers shall facilitate the combination of gainful employment and parenthood with respect to both female and male employees. All employers with a minimum of ten employees are required to prepare an annual equal opportunities plan<sup>58</sup> as well as a plan of action for equal pay. As mentioned in section A training is often offered about the legislation and also the Ombudsman provides courses on different themes.

Policies and plans for gender equality sometimes also refer to the legislation on for example work environment, the legislation against discrimination of part time workers and workers with short term contracts as well as discrimination law on other grounds than gender,

#### Collective agreements

There are several headlines connected to gender equality in the collective agreements between social partners in Sweden. In the second follow up report on the Framework of Actions on Gender adopted by the European social partners the following are mentioned (page 67-68)<sup>59</sup>:

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<sup>55</sup> [www.jamombud.se](http://www.jamombud.se)

<sup>56</sup> See Annex 4

<sup>57</sup> See Annex 5.

<sup>58</sup> In the new legislation from 2009 this will be changed to employers with a minimum of 25 employees and the plan should be submitted every third year.

<sup>59</sup> BUSINESSSEUROPE, UEAPME, CEEP and ETUC (2007) FRAMEWORK OF ACTIONS ON GENDER EQUALITY. Second follow-up report.



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- Attention should be paid to the possibilities to combine work and parenthood. The work organisation and working time issues as well as possibilities to work from the home can be considered if necessary.
- The needs of the enterprise/business as well as the needs and wishes of the employees shall be considered when setting the work schedules. The working hours shall be in harmony with artistic goals and demands. The aim shall be to, as far as possible, take the employees possibilities to combine work with parenthood and a social life, thus should for example a continuous time off be aimed at.
- Continuing training/education/information shall normally be carried out during standard working hours.
- Working life shall be attractive to staff members in all phases of life and accessible to all.
- It is natural to include employees who are absent due to sick- or parental leave in the wage determination.
- Employees absent due to illness or parental leave shall have a normal wage trend compared to other employees."
- The enterprise and the trade union's local branch shall, if a salaried employee has been on parental leave for at least eight months, look over the salaried employee's salary within two months from the return to the work place. This shall be to secure a correct setting of wage rates. Parental leave shall be considered equal to time at work when setting the wage rates."
- The salaries structure shall stimulate to continuing training so that the individual through the whole working life shall be able to contribute to the enterprise's development. In this aspect it is of most importance to also pay attention to employees that are absent due to illness or parental leave.

### ***Social responsibility and sustainability reporting***

#### Reporting and development of standards

Sustainable reports has increased during the last ten years in Sweden and different names are used according to FAR SRS<sup>60</sup>, the professional institute for authorized public accountants, approved public accountants and other highly qualified professionals in the accountancy sector in Sweden - environmental accounts, social accounts, CSR accounts, SR accounts etc. The reporting is a voluntary accounting area and there is no definition of what the report should contain or how companies should report. External

<sup>60</sup> [www.farsrs.se](http://www.farsrs.se)



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auditors is not always used by the companies but FAR SRS has issued recommendations for auditing of voluntary sustainability reports taking into account the International Standards on Assurance Engagements 3000<sup>61</sup>.

In terms of CSR Swedish companies for example have codes of conduct that refer to ILO and UN conventions on human rights. At the moment 48 companies are participating in United Nations Global Compact<sup>62</sup>. The Swedish Partnership for Global Responsibility<sup>63</sup> is an initiative that takes into account Global Compact and OECD's Guidelines for Multinational Enterprises<sup>64</sup>. Several companies have also increased their demands on suppliers such as certification according to Social Accountability International's SA8000 standard on human rights<sup>65</sup>. The Global Reporting Initiative<sup>66</sup> has attracted several large companies and all 55 state owned companies in Sweden have to make an annual sustainability report based on the GRI from 2009 and onwards. Possible this will stimulate other Swedish companies to use the framework for sustainability reporting.

Social accounts and audits are more common amongst organisations that are part of what is called the social economy, such as cooperatives and voluntary associations. An association as well as a specific website has been established for social accounting in Sweden<sup>67</sup>. Current developments in Sweden are a pilot program to introduce sustainability requirements for all sub contractors to Sweden's three largest regions and county councils and a project involving SIS working towards a standard (guidance) on sustainable development in municipalities, county councils and regions. An independent forum, SWESIF<sup>68</sup>, has also been created for organisations that work with, or promote sustainable investment (SRI).

### Training

Courses on (C)SR are offered at universities such as *Corporate Social Responsibility*, 7.5 credits at Luleå University of Technology, where different cases are presented of how companies can act or not act socially responsible. Another example is *Corporate Social Responsibility and Environmental Management*, 15 credits at Lunds University. Advanced courses that require prior undergraduate studies are also offered on *Organizational Responsibility, Accountability and Sustainability*, 15.0 credits at Umeå University, as part of Master's program in Sustainable Management. Mälardalen University has supported by the Community

<sup>61</sup> See [www.ifac.org](http://www.ifac.org) for more information.

<sup>62</sup> [www.unglobalcompact.org](http://www.unglobalcompact.org)

<sup>63</sup> [http://ec.europa.eu/employment\\_social/soc-dial/csr/country/sweden1.htm](http://ec.europa.eu/employment_social/soc-dial/csr/country/sweden1.htm)

<sup>64</sup> [http://www.oecd.org/departement/0,2688,en\\_2649\\_34889\\_1\\_1\\_1\\_1\\_1,00.html](http://www.oecd.org/departement/0,2688,en_2649_34889_1_1_1_1_1,00.html)

<sup>65</sup> [www.sa-intl.org](http://www.sa-intl.org)

<sup>66</sup> [www.globalreporting.org](http://www.globalreporting.org)

<sup>67</sup> [www.socialredovisning.nu](http://www.socialredovisning.nu) (information only available in Swedish)

<sup>68</sup> [www.swesif.org/eng/index.html](http://www.swesif.org/eng/index.html)



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Initiative Equal designed a course focusing specifically on *Social Accounting*. Outside the academy Global Responsibility International AB offer training in sustainable development and training for certification of auditors according to GRI. Training courses are also offered in *Business Ethics and Responsibility* by for example SIFU, a training organisations specialised in technology and management. CSR is also part of specific courses for controllers and internal auditors delivered by for example IREV, a training organisation specialised in accounting and auditing and wholly-owned by FAR SRS. Courses in social accounting are offered by actors within the social economy for example Adult Educational Associations and Coompanion<sup>69</sup> an organisation promoting cooperative enterprising.

### *Practices in the field of gender equality*

There are numerous examples of gender equality practices in Sweden with relevance for management systems and therefore this report is limited to giving some introductions to different methodologies implemented in public and private organisations, including companies. In most cases training are offered for managers, consultants and gender equality experts in connection to implementation of the specific methods. Sometimes training is offered for trainers/instructors in the method. Practices developed during the 90s but rarely used now days are included when assessed as relevant for the FRO Curriculum. Additional information about different methodologies is provided in Annexes to the report.

#### Gender mainstreaming, management systems and certification

*Balance Score Card*: Some organisations have use Balance Score Cards for mainstreaming gender equality into their operations since this is a method for managing flat and integrated organisations. See Annex 6

*3R*: The most exported Swedish method for gender mainstreaming is probably 3R (Representation, Resources and Realia) which originally were developed for local authorities. See Annex 7.

*The Ladder*: This method is developed mainly for public authorities but can be transferred also to other organisations. See Annex 8.

*EQ2000*. The method developed by one of Sweden's most well known gender equality experts has similarities with the ISO system and the point of departure is the potential for improvements, and the gender

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<sup>69</sup> [www.coompanion.se](http://www.coompanion.se)



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perspective is integrated in future and current activities. EQ 2000 is linked to business development, increased efficiency and profitability. It covers four stages - planning, implementation, review and evaluation. For each field of action a number of check lists, routines, and measurable indicators are used.

*Gender Equality in Management Systems.* This method was initially introduced in a project involving ten organisations and aimed at organise and evaluate gender equality work in workplaces, incorporate a gender perspective at all levels of organisations and make gender issues a part of management's work. The method was designed to use two dimensions: Seven work areas (external environment and mainstreaming; working conditions and the workplace environment; family life and work; education and skills development; recruitment and promotion; salaries and benefits; sexual harassment) and six procedural areas (goals; mapping; measures and methods; monitoring and auditing; responsibility, delegation and involvement; evaluation of management). Some of the obstacles for implementation were that it required deep knowledge about the methodology and gender quality and a special assessor. See Annex 9.

*BETSY - Benchmarking as a Tool for Realising Equal Pay*<sup>70</sup>. Betsy was a transnational project funded by the Community Programme on Gender Equality that focused on the issue of equal pay for equal work and work of equal value regardless of gender. Within Betsy the results from the project on gender Equality in Management Systems mentioned above was further developed. See Annex 10

*Gender equality standard (trade mark) EQ-Z-County.* This is a regional standard used in one of the Swedish counties that has for a long time been well known for gender equality initiatives, Jämtland. The standard has attracted both private and public organisations, SMEs and larger companies. See Annex 11. Other similar initiatives have been taken at local and regional levels.

#### Gender equality index and gender budgeting

*JÄMIX® (EQUALIX).* The Institute of Human Resource Indicators<sup>71</sup> in Sweden collect, analyse and present data regarding human resource costing and accounting such as the Equal opportunity index, EQUALIX with 19 indicators covering areas such as professions, management, leadership, salaries, health, parenthood, part time employment, security, gender equality plan, representation in boards, recruitment of managers, educational level, short term leave, and parental leave. Gender equality is also reflected in the so called Work conditions index, WCI. The Institute provide advanced seminars and training to support the use of

<sup>70</sup> [www.equalpay.nu](http://www.equalpay.nu)

<sup>71</sup> [www.nyckeltalsinstitutet.se/eng.html](http://www.nyckeltalsinstitutet.se/eng.html)



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human resource accounting, and Awards are linked to the Indexes. Reports include comparisons between the organisations and the participating organisations represent over 250.000 employees in Sweden.

*Folksam's JämställdhetsIndex:* One of the large insurance companies and investors in Sweden, Folksam, are assessing all companies registered at the stock market. The Index measure women's and men's representation in the board, in the management group and amongst the employees.

*Gender budgeting.* Even though Swedish gender equality experts have assisted many countries with applying gender budgeting it has been a slow process "at home" and there are few examples of implementation. But the Västra Götaland region use gender mainstreaming within the budget process. See Annex 12.

#### Gender equality and profitability

In terms of gender equality and profitability there are mainly different studies available. In the 90s the Swedish Business Development Agency<sup>72</sup> developed a model for measurement of gender equality and profitability and carried out a large scale study. See Annex 13. But the study has not been replicated.

A more recent study was conducted some years ago, based on ISO 9001:2000 and gender equality. In the study 2000 persons in management position in companies in different sectors and in local authorities were interviewed. The most profitable companies were following the ISO and in addition they worked with gender equality. Companies that worked according to ISO and that had an active gender equality work

was more profitable than the organisations just working according to ISO. An additional interview study with 900 managers and co-workers showed that employees often perceived gender equality as important, whilst managers did not perceive it as so important even if it was high on the agenda in company policies<sup>73</sup>.

<sup>72</sup> Now days the Swedish Agency for Economic and Regional Growth

<sup>73</sup> Framgång för Sverige (2005) Ledarskap för tillväxt. Så skapar chefer framgång ("Leadership for Growth. In this way leaders create success", Swedish Agency for Economic and Regional Growth, SIS Forum, Swedish Association for Quality and Swedish ESF Council. (information only available in Swedish).



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### *Pathways for analysing training needs*

Based on the survey in Sweden some main organisations have been identified as key actor in the continued process for analysing training needs amongst VET teachers and trainers in FRO, identifying potential providers for training in FRO and for valorisation.

**Social partners** The social partners play a crucial role in the development of FRO both in light of the collective agreements, applying the legislation and supporting their members/member organisations. Main trade unions are:

- LO - central organisation for 15 affiliates \* which organise workers within both the private and the public sectors. In total approx. 1.831.000 members. \* Of specific interest are IF Metall (Industrial and Metal Workers) with over 400.000 members and Handels (Union of Commercial Employees) with approx. 153 000 members
- TCO - central organisation for 16 affiliates\*\* which organise professional and qualified people in working life. In total approx. 1.300.000 members. \*\* Of specific interest is Unionen with approx. 500.000 members in manufacturing and service industries.
- SACO - central organisations for 24 independent associations with over 500.000 members that are academics or graduate professionals with a university or college degree.

**Main employers associations are:**

- The Confederation of Swedish Enterprise represents 54.000 Swedish companies and consists of 50 trade and employer association members, representing 70% of the Swedish private sector and employing approx. 1.5 million people. Nearly 1/3 of is employed in companies that are members in Almega, which is the forum for service companies.
- The Swedish Association of Local Authorities and Regions representing 290 municipalities, 18 county councils and two regions.

**Universities and university colleges.** In terms of universities some of the most interesting for the FRO Curriculum are:

- Malmö University which are a new innovative university college with a profile towards diversity (South Sweden).
- Karlstad University with both gender research and education as well as close co-operation with businesses (Mid Sweden)



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- Luleå University of Technology which are involved in research projects focusing on gender equality in co-operation with industry (North Sweden). Luleå also act as host for SIRA (Swedish Interactive Research Association) thereby accessing work life researchers with close contacts with the industry all over Sweden.

Training providers and experts. In terms of training providers and experts some of the most interesting for the FRO Curriculum are:

- SIS Forum AB, which is wholly-owned subsidiary of the Swedish Standard Institute
- IREV, which is wholly-owned training organisation of FAR SRS
- The Business Leadership Academy which was established in 1995 by Swedish business leaders. It is a prestigious Academy and besides training, coaching and mentorship for leaders it provides cutting edge research carried out by leading researchers in the field of gender equality, leadership and organisations.
- Adult Education Associations such as Folkuniversitetet and SENSUS able to assist in initiating new study circles and projects.
- Global Responsibility International AB offering training according to GRI.
- Large training providers specialised in management training and/or internal auditors of management systems (SIFU, Det Norske Veritas, Mainsys - web based education)
- Gender equality experts and consultants working close to companies and with specific competences related to management systems (Ann-Katrin Roth, Marie Trollvik, Dan Humble, Gabriela Nilsson Fägerlind - Diversity management)
- CSR experts (Sasja Beslik, Elisabeth Ekener Petersen)

#### Associations and networks

- The Federation of Private Enterprises representing approx. 55.000 business owners, mainly micro enterprises.
- The Swedish Standard Institute
- FAR SRS , the professional institute for accountants
- The Swedish Association of Human Resources Management
- The association for social accounting
- CSR Sweden business network
- National Thematic Working Groups on gender equality respective SR.

#### Public authorities:



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- The Equal Opportunities Ombudsman
- The Swedish Work Environment Authority
- The Swedish Board for Accreditation and Conformity Assessment
- County Administrative Boards in Stockholm (since mid 90s been involved in large scale initiatives), Uppsala (currently involved in initiatives around gender equality and CSR) and Jönköping, which is located in one of Sweden's most entrepreneurial areas.



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## DESK ANALYSIS: CONCLUSIONS

This desk analysis has confirmed that in Europe there are many training pathways for human resource managers.

In fact, if there is a lack of training in companies in Italy, not only at operational and intermediate level, but also among those who are in charge of managing human resources, the same lack is not registered in the other countries which take part in the project (Poland, Portugal and Sweden), even if in some cases doubts are arisen about the quality of those training pathways (i.e. Poland) or the general level of the education is quite low (Portugal).

Nonetheless only a few of these training courses really focus on equal opportunities and work life balance, although, there is a continuous growing number of courses and master on the issue. Moreover only a few teachers and trainers who run these trainings have the necessary knowledge and awareness of how work life balance influences equal opportunities.

If, by one hand there is a wide variety of training courses in gender equality offered by different actors such as universities, private training companies, adult educational associations, social partners and public authorities, in general though we can say with absolute certainty that in the 4 countries which take part in the project, with the consistent exception of Sweden, most of the training activities addressed to managers in charge of managing human resources do not devote particular attention to the gender issue.

At the same time, we can also say that, again with the consistent exception of Sweden, the majority of trainers who deal with human resources management have only a limited knowledge of the gender issue and of the problems linked to conciliation of work and private life.

We should also underline that the only officially recognized standard concerning the concept of corporate social responsibility (SA 8000) does not pay particular attention to the conciliation of work and private life, even if two out of the nine requisites enlisted by the standard, *Discrimination* and *Remuneration*, refer directly to the gender issue.

However the SA 8000 certification is not yet very common. We must remember that only 1.461 companies have been certified (on 30 September 2007) of which 626 in Italy.



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Therefore, in the four countries, there is a strong need to increase qualifications of teachers and trainers so to offer adequate training for enterprises focusing on management systems for gender equality and Family Responsible Organisations (FRO).



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## ANALYSING PROFESSIONAL PROFILE AND TRAINING NEEDS

The aims of the Working Package 2 is to carry out in depth studies of training needs amongst the target group and analyse the professional profile for FRO trainers.

The professional profile and training needs amongst VET teachers and trainers in the field of FRO were analyzed through surveys, interviews and focus groups.

The partners analyzed also the needs amongst potential beneficiaries and users in Europe

Based on the research carried out a professional profile and content of a training program will be outlined.

The main activities of the WP 2 are: Desk Analysis, Interviews and Focus group . The Output will be a report on the training needs in the field of FRO.

The Desk analysis Report was the first step toward the definition of a comprehensive professional profile and the designing of a new training program for those teachers and trainers. The Report that here we present is the following step toward the definition of the comprehensive professional profile and the designing of the new training program that are indeed the final outcome of the FRO curriculum project.



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## INTERVIEWS

### INVOLVED AREAS

The areas involved in this action are wider than the partnership country and were been:

- Questionnaire A : organizations and enterprises

- § Poland

- § Sweden

- § Italy ( with a special focus on the Veneto Region)

- § Belgium

- § Germany

- § Greece

- Questionnaire B: teachers and trainers

- § Poland

- § Sweden

- § Italy ( with a special focus on the Veneto Region)

- § Portugal

### TARGET GROUPS

- Questionnaire A : organizations and enterprises (28 questionnaires submitted)

- § Private enterprises (SMEs)and cooperatives

- § Trade Unions

- § Trade associations

- § Special Agencies connected with the Chamber of Commerce and development agencies

- § Gender Institute

- § Public Body

- Questionnaire B: teachers and trainers



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- § Poland
- § Sweden
- § Italy ( with a special focus on the Veneto Region)
- § Portugal

## METHODOLOGY AND TOOLS

Two different **questionnaire** were prepared:

- An half-structured questionnaire to administering to a sample group of **trainers and teachers**.  
The interview were aimed at presenting the FRO model and the FRO curriculum, detecting the interest of organizations in equal opportunities and conciliation matters, detecting training needs of those organizations in the field of equal opportunities and conciliation, detecting the interest and availability to apply for a training, collecting information about other organizations which could be involved in the training
- An half-structured questionnaire, mainly based on answer closed questions to be administered to potential beneficiaries (**trainees**).  
The interview were aimed at presenting the FRO model and the FRO curriculum, detecting the interest of organizations in equal opportunities and conciliation matters, detecting training needs of those organizations in the field of equal opportunities and conciliation, detecting their interest and availability to apply their staff (human resource manager and/or quality manager) for a training

**Focus groups** with teachers and trainers to whom return the results of interviews and start a sensitization path on those topics, will be organized in Portugal, Sweden, Poland and Italy.

## MAIN TOPICS FOR INTERVIEW

- § Local acknowledge of equal opportunities and conciliation matters
- § Impact of critical situations
- § Local level of knowledge and training needs
- § Existing training modules



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## QUESTIONNAIRE A FOR ORGANISATIONS/ ENTREPRISES

### Basic Information

Number of respondents: 28

### Characteristics Of Respondents

Questionnaire analysis was carried out among 3 organizations in Italy by CdIE.

They were as follows:

- The National VET Agency of the National Lega of the Cooperatives
- The Financial enterprise for the social economy. It is an enterprises network to promote the HH RR growth. In the network there are vocational training cooperatives, enterprises that mach answer and offer enterprises, other that offer administrative advocacy, HR management improvement etc
- A small private Consultancy enterprise in the field of the HHRR Management.

The questionnaire has been submitted to a very diversified range of organisations and enterprises, 10 in Italy, by UnionCamere del Veneto with the aim of collecting relevant information on the real training needs and interests within the regional economic framework.

In particular they have been interviewed:

6 Enterprises (SMEs)

1 Cooperative

2 Special Agencies: one connected with the Chamber of Commerce of Vicenza, the second to the National Chambers of Commerce Association

1 Regional Trade Association (representing handcrafts SMEs)

Questionnaire analysis was carried out among 7 organizations in Sweden.

They were as follows: A County Administration Board, a County Council, two private companies, a trade union, a governmental agency and a municipality.

Two in Germany and two in Greece (Thessaloniki), these organizations where a Intuitions for gender equality and development and one focusing on women friendly issues in Germany. In Greece, a Municipality and a development agency. See FRO data list.



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So, there is both policy makers and implementation responsible as well as private companies and institutions.

Questionnaire analysis was carried out to one organization in Belgium.

Questionnaire analysis was carried out among three organizations in Poland . One of them is strictly training institution, two others organize trainings, workshops, conferences.

First organization was Association of Women „Konsola” with main aim to eliminate discrimination and violence of women. The second organization - respondent was Polish Confederation of Private Employers „Lewiatan”. Lewiatan represents private employers from various industries from all over Poland, influence the legislative process, support efforts to create favorable conditions for Polish companies to compete on EU markets, promotes a positive image of private employers. Their action involves: active participation as business experts in the proceedings of governmental and parliamentary committees, file appeals to the Constitutional Court, give proposals of legal regulations enhancing the development of the private sector to the government and the Parliament and organizing conferences, seminars and trainings for our member-companies. In 2007 Polish

Confederation of Private Employers in frames of project Gender Index, has organized II edition of contest Equal Chances Firm. The contest has an aim to select firms which realize equal chances policy, not only obey regulations concerning discrimination but also offer unique solutions regarding diversity, assure the same salaries on the same or similar positions, facilitate family friendly Policy and make sure that workplace is free from sexual harassment and mobbing. Third organization was a training institution. Training and Guidance Institution „Homo Creatore”, organizes open/closed trainings, provides guidance for organizations and individual persons.

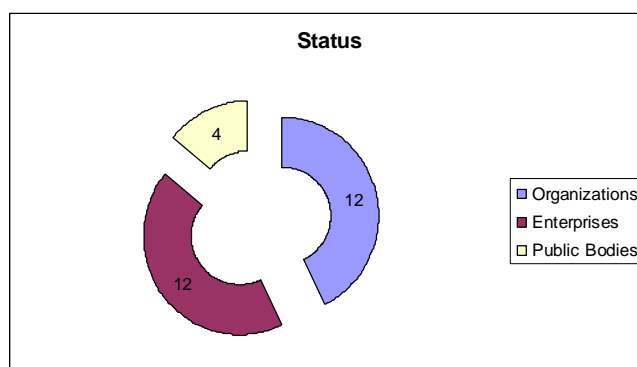
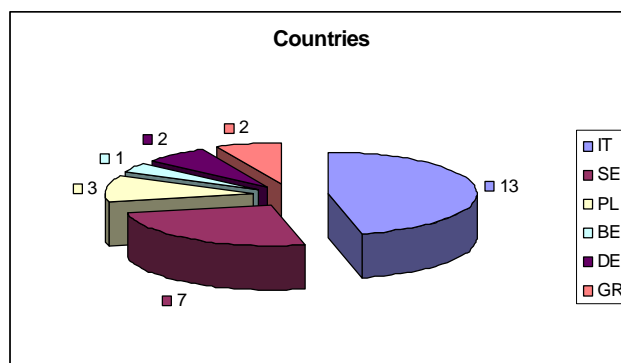
|       | Organizations | Enterprises | Public Bodies | Total |
|-------|---------------|-------------|---------------|-------|
| IT    | 4             | 9           | 0             | 13    |
| SE    | 2             | 2           | 3             | 7     |
| PL    | 2             | 1           | 0             | 3     |
| BE    | 1             | 0           | 0             | 1     |
| DE    | 2             | 0           | 0             | 2     |
| GR    | 1             | 0           | 1             | 2     |
| Total | 12            | 12          | 4             | 28    |



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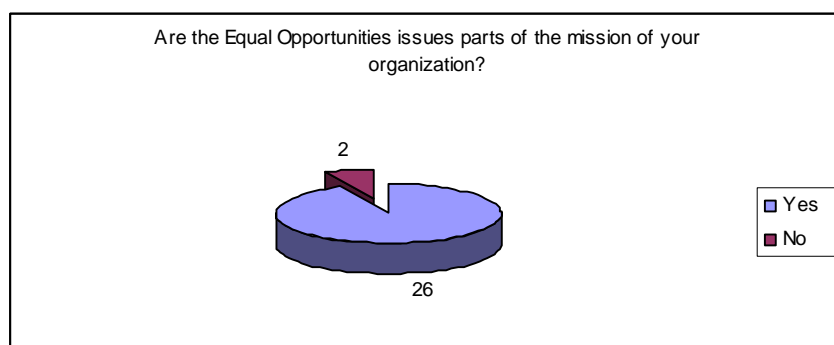
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## SECTION 1: TO ANALYSE THE INTEREST OF ORGANIZATIONS ON EQUAL OPPORTUNITIES ISSUES AND WORK LIFE-BALANCE.

### 1.1 Are the Equal Opportunities issues parts of the mission of your organization?



#### In which way?

See the National Report attached

It is interesting to notice that in Sweden “The Swedish gender equality legislation demands that every enterprise needs to have a written gender equality policy, which follows up every year by the public authorities and the gender equality expert at the County administration Board”.

#### Why is not part of the mission?

See the National Report attached

## 1.2. Do you have a written policy on the equal opportunities?



### In which way?

See the National Report attached

It is interesting to notice that in Sweden "there is a gender equality legislation that stipulates that all organizations, enterprises and work places need to a gender equality policy that should be visible and presented for the employees".

### Why is not part of the mission?

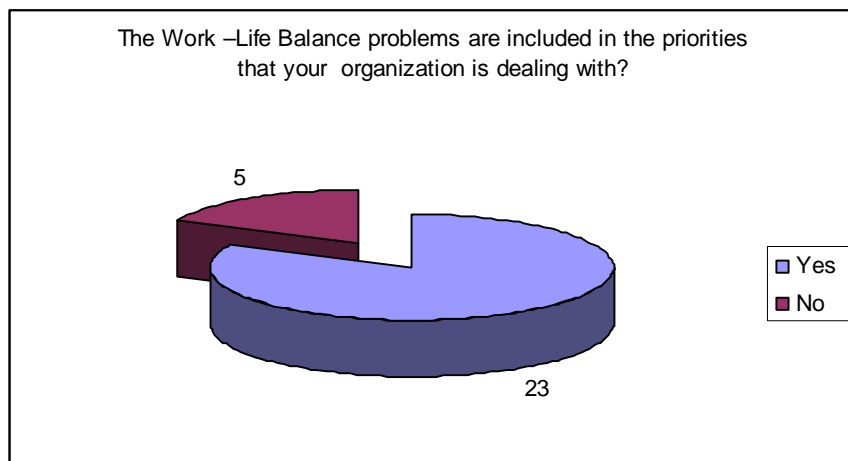
See the National Report attached

Written policy have not been adopted by the main part of the interviewed barring Swedish that are obliged by law.

The more frequent answers are:

"This is because of the informal organization of each structure" and "The size of the company does not justify a written declaration".

### 1.3 The Work -Life Balance problems are included in the priorities that your organization is dealing with?



#### In which way?

See the National Report attached to read the detailed answers

The majority answered positively, hereby an excerpt:

- We try to solve the work life balance of our employees .....
- Our business is based on people not capital goods. Hence performance and motivation are key.
- As an Association of employers and entrepreneurs we believe that work and personal life are priorities that complement each other, and if they are well recognized they can contribute to increase of work output and employees' loyalty.
- They are connected to the gender equality policy and to the gender equality action plan that the work place has focused on, and there is always something about work-life balance.....
- Specific attention is dedicated to flexibility policies as for example through telematic working or through part-time.

#### Which are the main measures your organization has implemented?

See the National Report attached to read the detailed answers

#### The measures more frequently implemented are:

Part time, telework , flexible time, statistics and facts by gender, improvement of work organization, reduction of work overtime, in House training (IT languages), distance working (VPN)



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- in Sweden “The main measures within the organization are central planned from the Ministry of Internal Affairs and include maternity and parent benefits (extra vacation, grants, reduced time program etc)”.

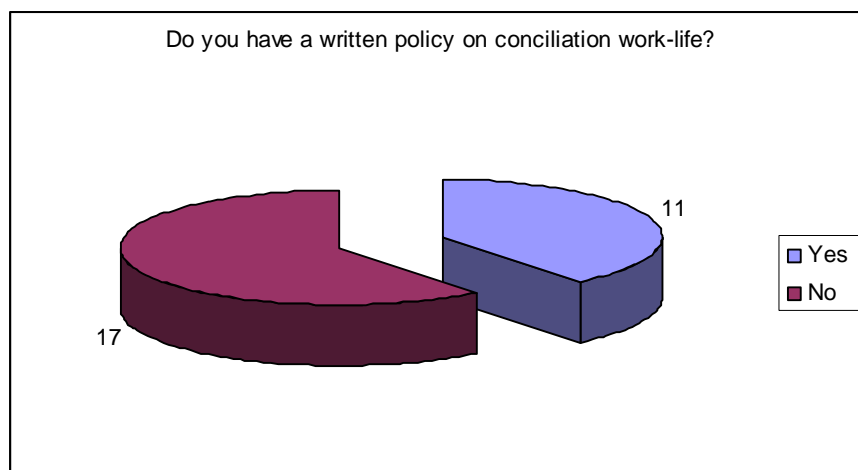
#### Why is not include in the priorities?

See the National Report attached to read the detailed answers

The five negative answers recognizing the importance of this issue. Some of them recorded that are not in their priorities because they are :

- too small and too young .....they have more urgent priorities
- the simplified structure of the interviewed enterprises remove the obstacles to a correct balance between work and family

#### 1.4. Do you have a written policy on conciliation work-life?



#### Why?

See the National Report attached to read the detailed answers

Not much more than one third answered positively, hereby an excerpt:



- To attract people to work in the company it is a concurrence question for the future.
- Equal conditions and will to attract people to become employees in the industry.
- To influence the working circumstances according to the age, especially 45+.
- To have transparency for the staff.
- It is connected and into the National gender equality legislation and this is also included in the work organization as a second goal so it is not explicit in the work organization.

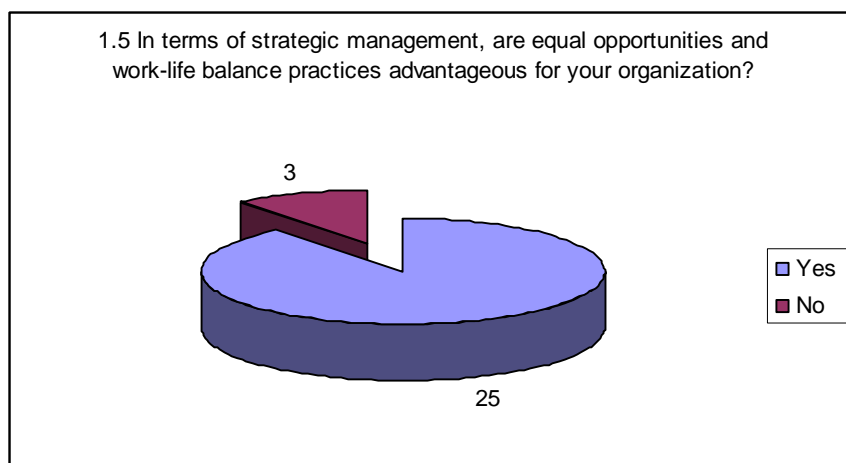
### Why not?

See the National Report attached to read the detailed answers

Almost two third of answers are negative.

The small size and the informal organizations of some enterprises are often used as a justification the absence of written policy.

1.5 In terms of strategic management, are equal opportunities and work-life balance practices advantageous for your organization?



Despite the lack of strategic written document related top the proposed policies about all the organizations demonstrated a positive interest towards the introduction of equal opportunities and work-life balance practices in terms of strategic management advantages.



### Which are the advantages of improving equal opportunities and work-life balance?

In the 25 positive answers recorded we find only few shades . The advantages are traced back to the best climate in the enterprises, the attraction of more talent and the satisfaction of the employees.

Considering the relevance of the answers on our project's activities, in succession all the answer recorded:

- *That every work place and employer and employee needs to reflect on the important issue all the time, in recruitment and to have personal that wants to stay in the working place for a long time to create a gender equal working place.*
- *Satisfied and more efficient employees.*
- *To keep the focus on gender mainstreaming in daily work.*
- *To attract people to become employees and than it is important to show that you can combine work life and family life. There is a women dominated work place, so this must be of importance to attract women but of course also but in the recruitment process.*
- *The company is involved in different gender studies to increase the knowledge at every level the importance of integrate gender equality and conciliation.*
- *But there is a need of more knowledge at every level in the company it is still a lot to do!*
- *The organization is involved in different gender studies to increase the knowledge at every level the importance of integrate gender equality and conciliation.*
- *Satisfied and successful business women more success in work and business.*
- *Satisfied, motivated, healthy and successful working staff.*
- *We think that these values in prospect can have a strategic impact on our activities, characterizing the content and the methodology of our services giving us an original perspective of our base.*
- *For us Equal Opportunities and Work-Life Balance issues are not only political matter or building favorable company profile but it directly influence company's work output, employees' loyalty and efficiency which leads to better functioning of SME sector.*
- *It is natural. Women could have a better life than today. Today women still earn less than men, rarely are on managerial positions, lower number of women work In prestige professions. Certain sectors, such as teachers, lower medical staff, where women dominate are the worse paid, they have difficulty to be promoted, more often women than men are laid off, among unemployed there is higher number of women. Equal Opportunities aspire to change this situation.*



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- o *In this case we can speak about advantages for the company and individual employee. The employee improves his/her efficiency in realization of professional and personal objectives, understands connections between life spheres and roles, discovers his/her unused resources, protects himself against syndrome of being burn out professionally, learns how to efficiently realize his/her needs respecting others, learns how to react in crisis situations by creating life business plan for the next years, introduces to his/her life more harmony, joy, peace and satisfaction.*

Two of them however considered such strategy be advantageous and coherent with the organization's mission but difficult to be applied in concrete.

One respondent considered introducing such policies positive but expensive in terms of time and costs for the enterprise.

The remaining 6 considered equal opportunities and work-life balance practices positive both in terms of efficiency and motivation within the employers.

#### Why not? Which are the disadvantages of improving equal opportunities and work-life balance?

- *The question is not on the agenda, yet!*
- *The strategic management need to handle the question and issues anyway.*
- *The loss of time connected with the improvement of the mentioned policies.*

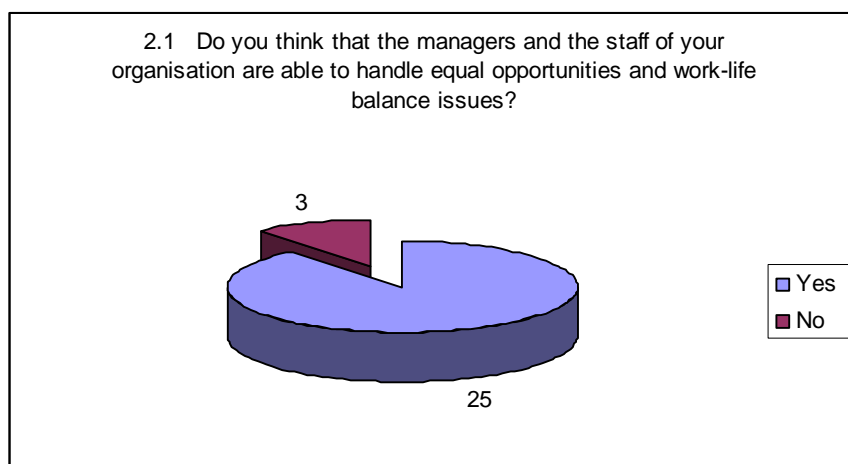


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## SECTION 2: TO ANALYSE TRAINING NEEDS OF THOSE ORGANIZATIONS IN THE FIELD OF EQUAL OPPORTUNITIES AND CONCILIATION.

### 2.1 Do you think that the managers and the staff of your organisation are able to handle equal opportunities and work-life balance issues?



#### In what way they developed the competences needed to handle these issues?

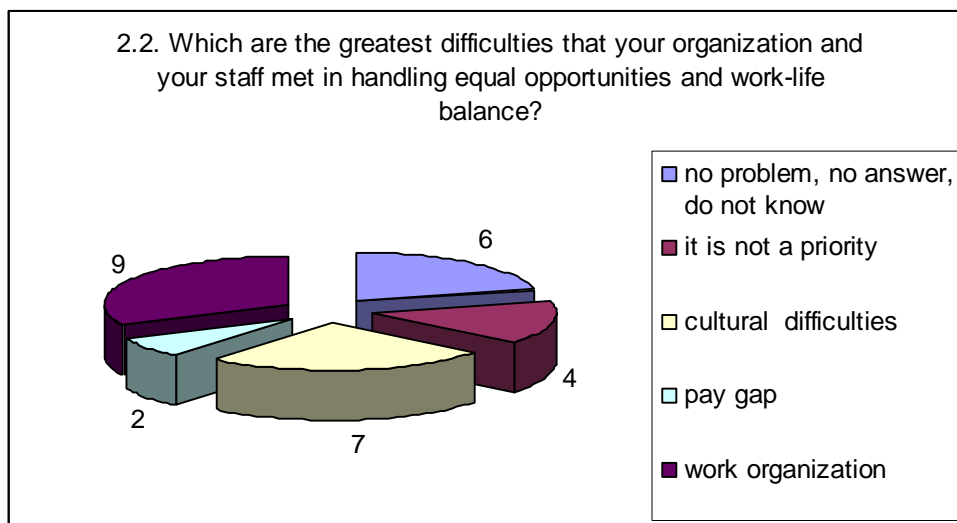
See the National Report attached to read the detailed answers

The instruments more frequently named are: trainings, meetings, workshops, seminars and conferences, participation in relevant projects, questionnaire to find out the differences, facts and statistics but several answered that the managers have informal competence or developed them in the daily working activity.

#### Why not? What competences they need to handle these issues?

- They need knowledge and competencies of gender equality issues in enterprise.
- They need information .
- They need to see positive connection and best practices examples on how businesses and enterprises work with gender equality - discussion and dialogue to learn of experiences.

## 2.2. Which are the greatest difficulties that your organization and your staff met in handling equal opportunities and work-life balance?



See the National Report attached to read the detailed answers

We try to trace all the answers in 5 general categories as in the picture above.

## 2.3. Have your organization ever carried out training on equal opportunities issues?

Maybe that some answers to this question were missed . We recorded:

### Yes

Has that covered your needs?

16 answers

Do you feel that you can get on with implementing what you have learnt?

18 answers

### No

8 answers





### Has that covered your needs?

§ *It is always a development issue and it is a yearly ongoing learning process.*

- *The organization, in itself, hasn't carried out training on equal opportunities issues but some of the employees due to their educational background and training (social scientists) are aware of these issues. Moreover, most of the staff of the Centre for Complementary Support Services of ANETH has already participated in relevant seminars and projects.*
- *It is a ongoing process in the company.*
- *The elected woman councilor, which is responsible for the gender equality plan, has already participated in relevant projects and attended the last conference of Gender Equality Committee of Central Union of Municipalities that took place one month ago.*
- *Yes, seminars for male and female entrepreneurs: Gender in communication, Gender Marketing, work- life balances issues.*
- *We are authors and contractors of the project „Nobody is born bias – bias and discrimination prevention in education and trainings”, which one the main elements was workshops about bias and discrimination prevention. Main aim of the workshops is including bias and discrimination prevention because of ethnic origin, race, sexual orientation, gender, age, etc into all education activities.*
- *No it is still a need of training a ongoing training.*

Several organizations participated to organized training courses dealing with these subjects and they found them useful, but for some of them still the problem concern the concrete application of potential solutions, actually we received one negative answer: due to the approach too much theoretical given to the course.

### Do you feel that you can get on with implementing what you have learnt?

- *Yes, but there is a ongoing democratic process that is needed to be supported with ongoing information on gender equality issues and matters.*
- *We have a strong connection to the policy document, what subject within gender equality that is needed to give training in and how to implement. We are working actively with gender mainstreaming which means that we can integrate gender equal conditions etc in the ongoing HRM work in the organization and in the strategically work.*
- *Yes, but it seems to be tiredness in the organization for the gender equality issues. The effect of the ongoing gender equality work is not visible, which takes away energy from the question.*



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- *It needs to be more explicit education.*
- *Yes, in my opinion for business seminars the gender aspect is very helpful, especially in Marketing and Communication.*
- *Yes, in a lot of projects, for instance "Successful Fathers and children"; a lot of knowledge for our work in the institute.*
- *Of course, the knowledge participants acquire is totally oriented to be practically user In life. However, participants of the trainings courses should be asked this question.*

|    |   |
|----|---|
| No | 8 |
|----|---|

#### Why not?

- *We have not yet met this kind of problem inside our organization.*
- *We have other priorities.*
- *Because we have enough competence on that.*
- *Lack of time.*

It is not considered as a specific need or a priority mainly due to the low number of women employed and more in general of the number of staff within the organization.

#### 2.4. Have your organization ever carried out training on work-life balances issues?

Maybe that some answers to this question were missed . We recorded:

|     |   |
|-----|---|
| Yes | 8 |
|-----|---|

#### Has that covered your needs?

- *We have different priorities.*
- *Yes, otherwise we would not organize it.*



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- Each training course is adapted to training needs of companies. We treat our clients individually.

Several organizations participated to organized training courses dealing with these subjects and they found them useful.

#### Do you feel that you can get on with implementing what you have learnt?

- Yes, but we can be better than now.
- It was included in the gender equality training but it was not so obvious.
- The organization needs to go on and create education how to go on and find better combination for work and family life and how to handle the question.
- It is ongoing.
- Of course, the knowledge participants acquire is totally oriented to be practically used in life. However, participants of the trainings courses should be asked this question.

#### The organisation interviewed are sensible to these issues?

- Of course, the knowledge participants acquire is totally oriented to be practically used in life. However, participants of the trainings courses should be asked this question.

|    |    |
|----|----|
| No | 10 |
|----|----|

#### Why not?

- It hasn't been expressed as a need for training.
- See answer above it is not prioritized of the management, they cannot see the needs.
- Lack of time.
- It is not a priority of our actions.

It is not considered as a specific need or a priority. In one case the enterprise did not find any interesting course organized in its city but would be interested in applying.

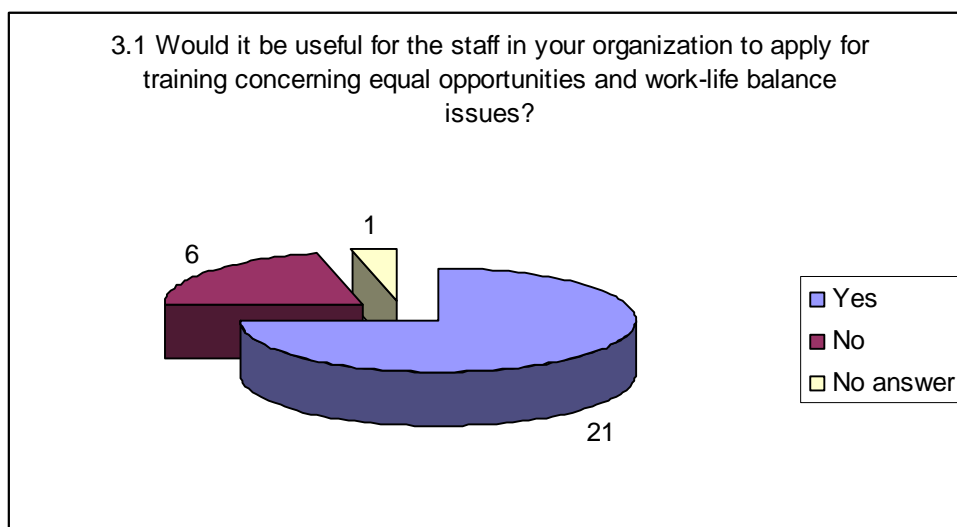


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### SECTION 3: TO ANALYSE THE AVAILABILITY TO APPLY FOR A TRAINING

3.1 Would it be useful for the staff in your organization to apply for training concerning equal opportunities and work-life balance issues?



See the National Report attached to read the detailed answers

#### In which way?

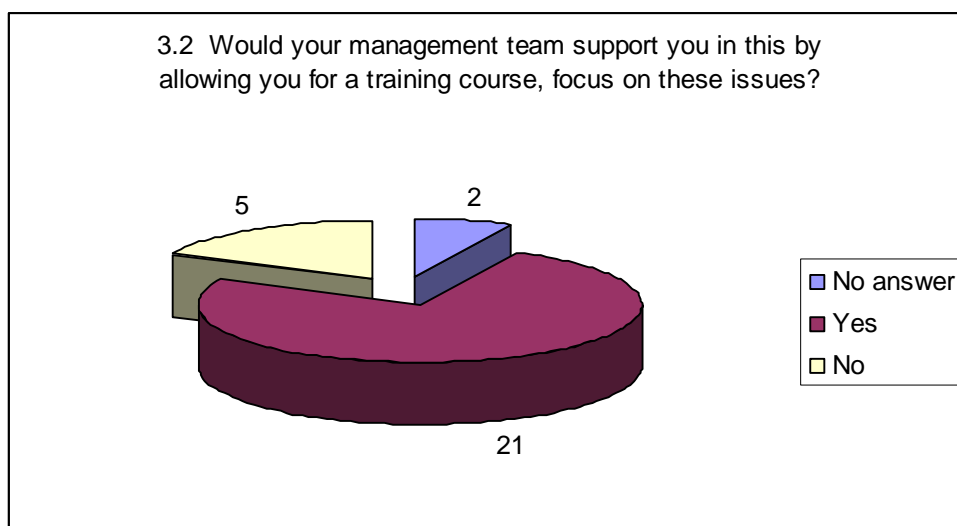
- Everything that has a positive impact on the employees health and contributes to the working places development is good.
- To have a learning process to find a common method together with the enterprise management and the staff (trade union) on how to integrate gender equality in the enterprise organization. It is important that the management and CEO will participate in the training.
- The most important thing is to have enough time to discuss and reflect together between the employers and employees how to implement gender equality and conciliation.
- Meeting or conference, exchange of experience.

Training courses are considered very useful especially if involving managers and also in case of involvement of several enterprises in order to share common experiences.

### Why not?

The organizations answered NO because of several reasons among which: lack of time, already acquired experience, or due to the very simple internal organization which privileges internal meeting compared to organized training courses.

### 3.2 Would your management team support you in this by allowing you for a training course, focus on these issues?



### How many hours could you dedicate this training?

One not answered; 2 declare: "It depend on the programme".

- *I think it should be a half-day of basic training. We have this kind of course in our further education catalogue for our organization. Special focused actions from what the employee questionnaire has showed.*
- *2-3 working days.*
- *16 hours which means 2 days training.*
- *8 hours which means 1 days training.*
- *A day- seminar (8 hours ) in our institute.*
- *6 hours.*



- *As long as it is necessary, it is normal for training organization.*

The answer given to this question have been coherent with the previous one.

A positive feedback concerning support in attending training courses have been noticed. Even if in two cases the persons interviewed were actually the only organization's managers of little enterprises and consequently they decided not to answer to this question.

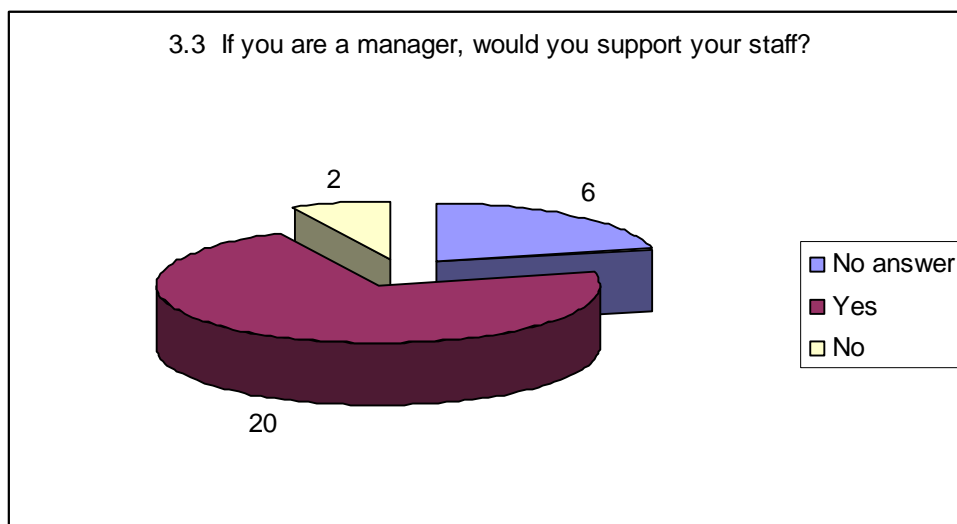
Just one respondent indicated how many hours could be dedicated to training: the maximum number indicated was up to 16 hours.

#### Why not?

- *The training of municipal staff is a central organized issue that is planning and implemented from a specialized institution for public servant training which direct belongs to the Ministry of Internal Affairs.*
- *they do not prioritize they issue.*

Three negative answers have been registered because courses to employers were not considered as useful for the organization also due to the lack of time.

#### 3.3 If you are a manager, would you support your staff?



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#### How many hours could your staff dedicate to this training?

- *it depend on the programme.*
- *8 to 16 Hours.*
- *2-3 working days.*
- *3 training meetings, 4 hour each time.*
- *8 hours.*
- *2 days in the year.*
- *10.*
- *As long as it will be necessary.*

Six positive answers have been given out of which one of them indicated the possible time to be dedicated to the coursed: up to a maximum of 24 hours in total.

#### Why not?

- *not me but the hr manager of the other companies yes*

One negative answer: courses are considered actually a loss of time.

#### 3.4. Which specific aspects do you think are useful to analyse and tackled?

One not answered; 2 answered: "Organizative aspects of a different kind of management and the rules of the national legislations it can be useful quantify the costs (if there are any) for a FRO organizations.

- *Stress factors with a gender perspective*
- *To follow up how the parental leave parents experience to come back to the work place*
- *Stimulate men to take parental leave*
- *Extended pre-school system*
- *Gender equal payment*
- *Gender stereotypes*
- *Legislation and Acts on issues of equal opportunities, gender equality, rights, benefits, maternity. Also issues concerning bulling and harassment at work and anxiety*
- *Gender mainstreaming perspective and the difference and the services*
- *Work time and wages - pay gap*



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- *Strategy of Gender Mainstreaming*
- *Gender Marketing*
- *Division of working and family tasks in enterprises and families*
- *Gender sensitive methods*
- *Managing Work Life Balance*
- *Safety*
- *The privileges of men; role of man in the family*
- *Internal management tools able to face the work's organization problem in case of flexible*

### 3.5 Which issues you consider not useful to be tackled?

Almost none organization answer to this question. Any specific issue was mentioned.



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## QUESTIONNAIRE B FOR TEACHERS AND TRAINERS

### BASIC INFORMATION

Number of respondents: 24

**5 respondents are from Italy and 3 from Bulgaria.**

The Italian respondents are employees of training institutions and academic teachers but also manager of Advisor agency in the specific field of organization and HHRR management.

The Bulgarian work in Advisor company on Labour market and social fund. In that way they will be involved in the organization of vocational training course.

Nine trainers/teachers **from Portugal** took part in the research which in everyday work encounters equal opportunities and work-life balance problems.

Majority of the respondents are employees of training institutions and academic teachers which are often invited by firms, organizations or institutions to participate or to lead workshops in above topics.

Seven trainers/teachers from **Poland** took part in the research which in everyday work encounter equal opportunities and work-life balance problems. Majority of the respondents are employees of training institutions and academic teachers which are often invited by firms, organizations or institutions to participate or to lead workshops in above topics.

Ten persons from **Sweden** were interviewed.

The respondents represented a sample of trainers, teachers and consultants from companies, authorities, NGOs and universities in Sweden (see below). A majority (8) of the respondents had experiences of carrying out training in the field of equal opportunities focusing on working life and organisational development. 5 respondents had experience of carrying out "training of trainers" as well as training on international level, in and outside EU. 3 respondents had specific expertise on how to design training for SMEs.

Because of the different standards used to write the results of their interviews, the Swedish report is a separate chapter after the overall report of questionnaire B, which contains only the result of the respondents from Italy, Bulgaria, Portugal, Poland.

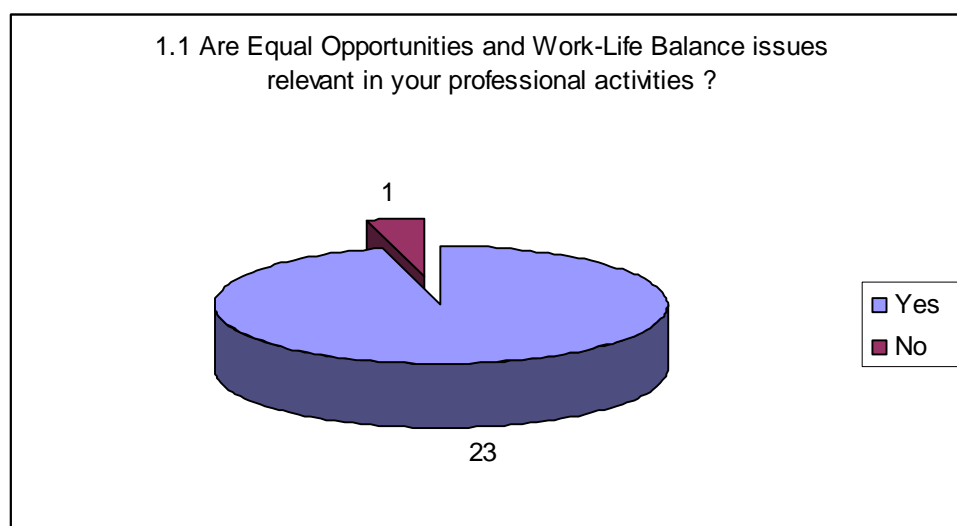


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## SECTION 1: TO ANALYSE THE INTEREST OF TEACHERS AND TRAINERS ON EQUAL OPPORTUNITIES AND WORK-LIFE BALANCE ISSUES

### 1.1 Are Equal Opportunities and Work-Life Balance issues relevant in your professional activities ?



Equal opportunities (EQ) and Work Life Balance (WLB) had relevance for all respondents in their work as trainers, teachers and/or consultants as well as for their respective organisations.

If positive, Which are the main aspects ?

#### ○ Organizing

- Selection of training program and working methods;
- composition of courses adapted to training participants;
- place and time of the training adapted to participants;
- plan the lessons timetable according to equal opportunities and work-life balance issues;
- discuss equal opportunities and work-life balance on the classroom;
- pay particularly attention to the labour market: scope of equal opportunities; labor law concerning;
- changes on workplace;



- changes on education;
- sensibly students to those topics, since majority are women;
- integrate the equal equality issues in general courses;
- Trainings directed to directors for human resources development, human resources department directors, human resources managers, human resources managers responsible for individual areas of functioning, training departments' managers, companies' owners, workers of human resources departments, managers, members and employees of NGOs.
- 1-2 day trainings, and also 3-day workshops.
- Participants receive training materials and diploma to finish the course.

## ○ Methodological

- The **attention to the language** is an issue that several respondents usually tend to check especially considering that Italian is a particular sexist language.
- Some of them explain this element to the class putting in evidence the way in which the language has been created and its **linkages with the role and the stereotypes** that inform our society.
- **Social cultural aspects** related with gender are put in evidence.
- Subject - gender studies.
- Legal, economic and psychological knowledge and practical skills concerning **flexible work forms**;
- To acquire self-confidence, confidence and effectiveness in contacts with employer; adaptation of work conditions to parents' needs.
- Discrimination, mobbing at work; existing forms, legal regulations and its practical use, employers' responsibilities, managers' responsibilities, legal practices; enrichment of practical knowledge about equal opportunities at work and employers' responsibilities in this area; mobbing problems explained in wide and in experts way.
- Increasing awareness and knowledge concerning equality among projects' leaders using public funds, including EU funds; also giving practical skills to projects' teams so they include equal opportunities perspective during process of projects' management.
- How to observe of adherence to regulations and anti discrimination procedure - what to do when discrimination act happens.
- Coaching understand as internal process of developing awareness of effects and causes of relations, events, life changes, positive aspects of everyday life, good communication skills; moderated discussions,



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exercises, practical tasks In small groups which will answer the question: what is the meaning of work and relationships In a person life.

## ○ Content

- In all the lesson several interviewed include gender aspects and/or I try to emphasize the gender impact.
- Some of them give specific lessons about gender issues usually are focused on labour market aspects and on legislation.
- Particular attention is also given to the gender impact of public policies, and on specific methodologies and tools that can be applied in the policy cycle.
- Especially in the training relating with job search (job search, career transition, outplacement) lessons related with gender differences and equal opportunities can be relevant.
- The issue of the Equal opportunities can be deal in term of cultural organization changing in the sense of a more complete development of the HHRR.
- In compliance with the majority of the ESF vocational training every training has some trough lessons on Equal Opportunities issues both on the legal and the pursuance aspects.

The respondents especially highlight the following aspects in their answers:

- Content and practical examples that reflects both women and men's reality.
- Connection between sustainability perspectives and WLB.
- Diversity in organisations and equal opportunities between women and men.
- institution and experiences of motherhood; women as leaders; glass ceiling problem; hidden areas of women creativity, unpaid women work.
- Why work-life balance is important?; Conditions for flexibility; flexibility options - solutions; basic legal regulations of using flexible work forms; implementation procedures for flexible work forms; skills useful in flexible work forms; efficient time management;
- Scope of equal opportunities; equal opportunities in remuneration of women and men, employed part-time, new employees; labor law concerning „equal salary for the same job position”; equal opportunities of women and men In work relations; a job appraisal and conditions for its use or discrimination); employer's responsibilities concerning discrimination prevention; HR managers responsibilities concerning discrimination prevention.



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- *Self-management and self-guidance; self-management In time; designing business plan to realize life goals in harmonious way; strategies and tools for realization of life business plan; other training topics: assertiveness supports effectiveness of actions; realization of one's needs without disturbing rights of others; building proper relations with other people; building assertive attitude at work and in private life; consequences and standards in realization of life goals*
- *Introduction of gender issue to all spheres of life; explanation of term „gender mainstreaming“ - including equal opportunities perspectives to main policy trend - what does it mean In practice?; gender stereotypes and their influence on NGOs' actions; realization of equal opportunity policy in Poland and EU, including inequalities on labour market - with reference to new programming period 2007-2013 and European Year of Equal Chances for All; legal bases in realization policy „Gender Mainstreaming“; „Gender mainstreaming“ in practice.*
- *Stereotypes; consequences of traditional life roles: social, economical and personal; analysis of needs of both women and men; elaboration of assessment of the situation based on the analysis; formulating action aims taking into consideration perspectives and experiences of women and men; elaboration of proper program activities and methods of realization.*
- *Fast relaxation, effective recuperation of the body, communication with our own needs and partner's expectations, understanding and acceptance of other person's differences, how to act in conflict/stress situation, recognition of stereotypes and their effects in every day life, identification of one's own competences and perspective of personal/professional development.*

#### **If negative, Why ?**

- I do not take in to account the issue.

#### **To pay attention in particular to these issues are not useful.**

- *I never thought about it until now, I consider the mainstream culture.*
- *So as far as concerned bibliography I consider only the authors I know and that are useful for the issue/subject I am teaching.*
- *As far as languages, I know that the neutral language in Italian is the masculine.*

#### **This issues have to be considered in relation with the**



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- Organizing aspect
- Methodological aspect
- X Content aspect

but the body/organization/enterprise responsible for the training does not agree .

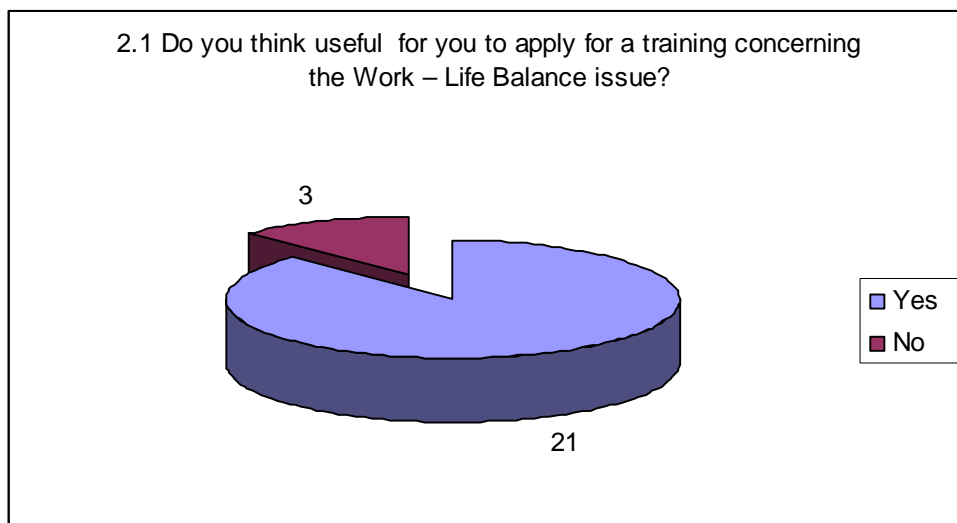


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## SECTION 2: TO ANALYSE THE INTEREST AND AVAILABILITY TO APPLY FOR A TRAINING.

### 2.1 Do you think useful for you to apply for a training concerning the Work - Life Balance issue?



If positive, How many hours can you dedicate to this training?

The interviewed answered in vary different way:

- The **Italians** answer from 4 hours to a maximum of 16 hours .
- The **Bulgarians** answer from 3 to 7 hours per week.

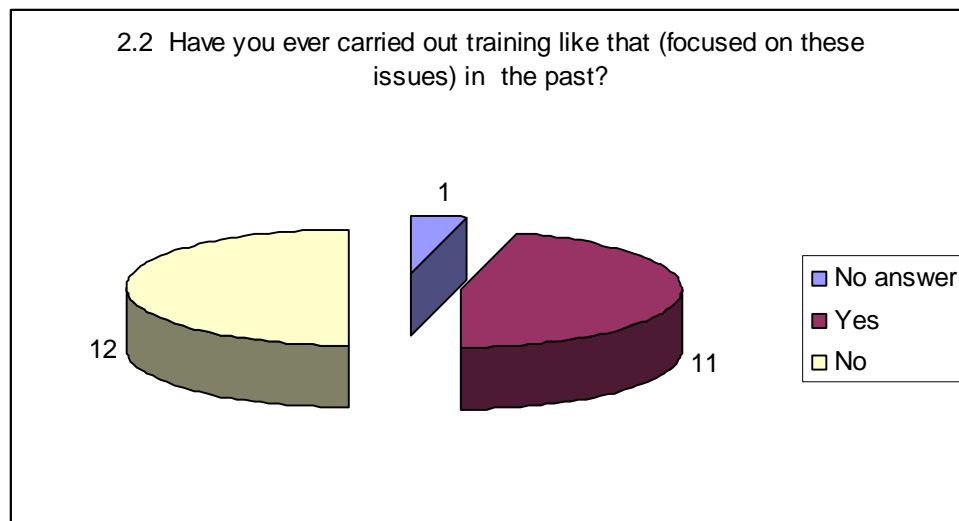
One of the respondents didn't specify how many hours could dedicate to the train.

The other seven respondents specified time they could dedicate, according to them, it could vary between 2 and 24 hours.

None of the respondents specified time they could dedicate to the training.

According to them, it depends on frame and content of the training and also on level they could upgrade their qualifications to.

## 2.2 Have you ever carried out training like that (focused on these issues) in the past?



### If positive, Which were the results?

- A much more balanced vision in our professional activity, in our life and in our relationship.
- Development of skills, also on law regulation.
- Acquire sensibility on those issues; breaking stereotypes concerning women role in personal and professional life, and remove some common sense.
- Increase of participants awareness and level of knowledge about flexible forms of work which will allow them to easier balance work and personal life, acquire skills of proper using law regulation concerning flexible work forms and their practical use which will make easier for them to choose form of employment; knowledge of influence techniques in order to convince employers that flexible work forms have advantages.
- Improvement in effectiveness in realization of professional and personal goals, understanding of real connections between different spheres of life and roles, increase of influence area, discovering one's own unused resources, protection against syndrome "to be burn out professionally".
- To determine borders of freedom and tolerance, empathy ability and understanding of different mentality processes, experiences of a partner.



### 2.3 Which specific aspects do you think are useful to analyze and tackled?

- *To share experiences and methodologies that could be widespread in different countries. Elements concerning the tools to be used during lessons apart from theory could be also an important element to be analyzed: for example, role plays or other tools/methodologies aimed to involve better the people attending the course. (answer of 2 respondents)*
- *the causal relationships that exist between gender issues/gender equality and work-life balance. Such an analysis would make it possible to initiate and develop an integrated approach in the field of the promotion and the achievement of equal opportunities.*
- *Regional specifics (in general) that exist in gender policies, stereotypes related to the subjects of work-life balances, etc. would help build a better understanding of the matters.*
- *to analyze the weak sides of the existing approaches in the field and to try to develop an approach concentrated on avoiding past failures.*
- *Parental leave legislation (giving emphasis on the paternal leave).*
- *Instruction about the Work Life Balance services funding.*
- *Elimination of discrimination on work place, restrictions preventing women from making career.*
- *Each firm, company and each human being should understand the values which are brought by society, organization free from discrimination*

### 2.4 Which issues you consider not useful to be tackled?

- *All the issues can be useful, It depends from the need of the people attending and from the aim of the training.*
- *If the training includes participants from regions with similar characteristics, there might be no need to analyze in-depth the regional differences and the need to adapt the approach at local level.*
- *Equal opportunities in the case of minorities and other vulnerable groups.*
- *Is important use a not discriminating approach towards men (extremely claiming or extremely focused on presumed superiority and/or inferiority).*



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### SECTION 3 :COLLECTING INFORMATION ABOUT OTHER TEACHERS/TRAINERS THAT COULD BE INVOLVED IN THE TRAINING.

#### 3.1 Do you know other teachers/trainers interested in this kind of training/initiatives?

Three respondents didn't answer this question.

Majority admitted that know some other teachers and trainers that could be interested in the train, however they prefer do not quantify.

One of the respondents also emphasize that, in general, teachers and trainer are not interested on these topics, since 3 years ago the Ministry of Education promoted a training course on gender equality and it didn't take place. The general view is that gender equality has already been attained.



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## QUESTIONNAIRE B FOR TEACHERS AND TRAINERS IN SWEDEN

### 1. Profile of respondents

In total 10 persons (9 women/1 man) were interviewed and the interviews ranged from 45 to 60 minutes. Each interview started with a short presentation of the FRO project and after that the respondents answered questionnaire B. At the end of the interview the respondents was given the opportunity to reflect on gender equality and work life balance issues.

The respondents represented a sample of trainers, teachers and consultants from companies, authorities, NGOs and universities in Sweden (see below). A majority (8) of the respondents had experiences of carrying out training in the field of equal opportunities focusing on working life and organisational development. 5 respondents had experience of carrying out "training of trainers" as well as training on international level, in and outside EU. 3 respondents had specific expertise on how to design training for SMEs.

#### Trainers at authorities

(F) Gender equality expert and trainer at the County Administrative Board of Stockholm. Experience of training of trainers and carrying out international training.

(F) Researcher and trainer at VINNOVA - Swedish Governmental Agency for Innovation Systems. Experience of training of trainers and carrying out international training.

#### Teachers at universities

(F) Gender equality researcher and university teacher. Specialised in gender equality and innovation systems. Luleå University of Technology

(F) University teacher and project manager at Halmstad University. Specialised in gender equality and diversity in working life. Experience of training of trainers and carrying out international training.

#### Trainers at business development agencies

(F) Advisor and trainer for entrepreneurs, innovators and SMEs at ALMI. A public owned organisation providing information, advice and loans for (potential) businesses.

#### Consultants in companies

(M) Gender equality consultant and trainer (entrepreneur). Specialised in designing training for SMEs.

(F) Gender equality researcher and consultant (entrepreneur). Specialised in working life. Experience of training of trainers and carrying out international training.



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(F) Consultant in the field of entrepreneurship, innovation and labour market (entrepreneur). Specialised in gender equality analysis and training as well as training for SMEs.

(F) Consultant in the field of international project development, including training at International Competence AB (Limited company). Specialised in the field of gender equality and diversity management as well as designing training for SMEs. Experience of training of trainers and carrying out international training.

### Trainers in NGO

(F) Project manager and trainer in the field of gender equality and diversity at Baltic Fem, a Women Resource Centre focusing on development in the Baltic Sea Region.

## 2. Results of the interviews

### 2.1. Relevance of EQ and WLB in own professional activity (Question 1.1)

Equal opportunities (EQ) and Work Life Balance (WLB) had relevance for all respondents (10) in their work as trainers, teachers and/or consultants as well as for their respective organisations.

*« EQ has relevance for us in our work to attract new groups using our services. We are interested to reach as many sectors and target groups as possible, and attract new customers »*

Legislation, policies and collective agreements in Sweden often highlight WLB but some of the respondents questioned to what extent these policies are implemented throughout their own organisations. Officially the organisations agree that EQ and WLB are important in terms of « organising, methodological and content » but

policies are not put into practice. One of the teachers interviewed referred to a study at her own university.

*«The study has also shown that Halmstad University both as a centre of learning and as a place of work has been more successful in creating good conditions for the employees than for the students to combine work and family. Halmstad University's documents for equality are ambitious in their design but there are further demands of practical work to achieve the goal.»* (Halmstad University as place of work for mothers with pre-school children - conditions and obstacles for women with home living children to combine working and family life, Bengtsson & Rückert, 2007).

The answers from the respondents confirm the overall picture from Sweden that it is not enough with policies, management systems, training and best practices in order to achieve sustainable organisational



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change.

### Organising

WLB is perceived by the respondents as a necessity for equal opportunities between women and men in organisations as well as the society as a whole. Gender mainstreaming is a concept well known among the respondents and some of them perceive WLB as an important part of the mainstreaming process.

*"- Gender equality permeates all our activities whether we carry out the activities ourselves or subcontract other companies. When it comes to the practical gender equality work in organisations work life balance issues is an important aspect of the trainees own learning process."*

The respondents especially highlight the following aspects in their answers:

- travel time to and from the location of the training has to be taken into account when designing and carrying out training activities;
- it is important to schedule the training adapted to the needs expressed by the trainees such as for example carry out the training on "parent friendly times" i.e. not too early in the morning or late in the afternoon;
- how the training is organised and marketed affects who will apply for the training as well as who will be able to carry out the training.

### Methodological

All respondents use interactive and participatory approaches and some of them apply gender pedagogies and a "doing gender perspective". Swedish teachers and trainers in adult education are increasingly interested in gender conscious pedagogies and analyses of training programmes - content, pedagogies, and material - in light of equal opportunities perspectives.

*«My methodology is based on interactive approaches and a doing gender perspective »*

### Some notes on doing gender

The theory of "doing gender" was introduced in the late 1980s and in this theory gender is not perceived as a set of traits residing with individuals, but as something people do in their social interactions. As such, gender is embedded in every aspect of everyday interactions. One's actions in doing gender simultaneously produce, reproduce, sustain and legitimate the social meanings accorded to gender. In recent years this theory has become very popular in the Nordic countries as well as other parts of Europe as a point of departure for organisational development practices. See for example Kvande (2007), *Doing gender in flexible organizations*, Fagbokforlaget.

The respondents especially highlight the following aspects in their answers.



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- create an inclusive environment where the participants perceive themselves as competent as the trainer and where women and men can express themselves and work together in group assignments.
- knowledge about «gender patterns» and that men often take up much more time and space than women in a training programme.
- distance education and training so that parents (mothers and fathers) have the possibility to carry out their studies from home.

## Content

All majority of the respondents (8) integrate gender equality issues in their training activities and 6 respondents focus on gender equality training in their professional activities. 5 respondents also focus on equal opportunities based on factors such as for example ethnicity. Some of the respondents are also working with a « sustainability perspective » in terms of economic, social and environmental development. Fewer respondents (4) have carried out training specifically focusing on WLB.

The respondents especially highlight the following aspects in their answers.

- content and practical examples that reflects both women and men's reality;
- connection between sustainability perspectives and WLB;
- diversity in organisations and equal opportunities between women and men.

## 2.2. Interest in, experience of and results from training

Most of the respondents (8) would be interested in participating in a training on WLB but most of them would only be able to dedicate one day (8 hours) or one and a half day (12 hours) for attending a training programme. (Question 2.1) On the other hand the respondents have contact with other potential trainees that might be interested in participating in a training, especially trainers, teachers and consultants involved in development work

in projects, clusters and organisations. (Question 3.1). The only man interviewed was sceptical to the interest among men to participate in a training:

*« It depends on the family situation and the individuals own insights if they are interested. I think it is easier to attract women to a training than us men. I often choose examples from my own working life and family life when I arrange training for SMEs to make it easier for men to identify. »*

A majority of the respondents has as indicated above carried out training in the field of gender equality where WLB issues have been integrated but fewer have carried out training focusing specifically on these issues. Most of the respondents combine consultancy and project work with training activities and it was difficult for them to distinguish between the results from training with results from consultancy for/projects in organisations. (Question 2.2)



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*«It is difficult to talk about the results of the training since it has to do with the context such as the target groups, which organisations that are involved and the length of the training. My experience is that the training sometimes has resulted in sustainable results and changed practices in the organisations, sometimes not. »*

In general terms the training activities carried out by the respondents has resulted in increased awareness about WLB among the trainees but training is often not enough to change practices in an organisation. But it has increased consciousness about WLB and norms permeating the society and norms among individuals. Concerning the question (2.3) of which aspects that are most important for a training focusing on EQ and WLB some respondents were reluctant to answer. They argued that it is important to always let the target group/trainees decide what aspects that are most important to analyse and tackle.

Nevertheless several of the respondents referred to the Swedish *equality legislation and equal rights perspectives*. The *interplay between individual, organisational and societal perspectives* - micro level (family), meso level (organisation) and macro level (society) - was also highlighted by the respondents.

Another recurrent theme in the interviews was *unpaid versus paid work*. The results can be summarised as follows according to a proposal from one of the respondents.

Individual perspective: Personal views on work life and private life and the individual's expectation of working life. Career planning - What do I want to achieve and what support do I have? Distribution of paid and unpaid work in the family. Unpaid work time such as travelling to and from work, handling of email regarding work at home. Responsibilities - how much work do I as an individual take on for issues that I am not actually responsible for.

Organisational perspective: WLB conditions at different work places. WLB conditions in different occupations. Working hours, flexibility, accessibility and distance work. Salaries and gender differences. Parental leave and

effects on career and salary. Working life and health. Strategies, tools, processes and initiatives to achieve organisational change.

Societal perspective: Legislation. Collective agreements. Norms and values. Facts and statistics from Sweden and EU. Demography and consequences for WLB. Comparative studies between different countries in fields such as child care and elderly care.

*« We need to analyse how we act in everyday life, our priorities concerning work and family. What is the situation today and how we would like it to be?*

### 3. Analysing the results from the interviews and dialogues

The results from the interviews show that all respondents are adapting their training activities to WLB in terms of both schedules, location and content.



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« We are trying to take into consideration the needs of parents that have small children when we are planning meetings, workshops and education both at internal meetings as well as meetings with customers »

« When we organise and plan training activities in our projects we often have to take into consideration that our participating women do not have an equal situation at home »

A majority of the respondents were interested in training within the field of EQ and WLB. On the other hand they had limited time to dedicate for what could be called more « general training ». In Sweden a lot of further training is tailor made for each organisations and/or target group. Existing general training on EQ often focus on legislation and policy frameworks. Designing a FRO training adapted to a Swedish context would therefore preferably consist of a 8-16 hours basic introduction and a possibility for the trainees to choice of a number of specialised « training modules » focusing on specific themes.

According to the interviews the main topics for a basic course could be:

- **Legislation and policies**
- **WLB - interplay between micro, meso and macro levels**
- **European comparative studies**

An interesting aspect of the interviews in Sweden was that the respondents to a large extent focused on individual perspective on WLB rather than an organisational perspective and themes such as career advice, coaching and mentorship. This reflects a shift from towards the individuals own responsibilities in recent years and launching of the term « Livspusslet » (eng. Life Puzzle. The term refers to the puzzle between work, family and leisure time. Gender equality, social security systems and organisational conditions as well as the individuals own approach affects the possibilities for handling the Life Puzzle.



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## ANALYSING PROFESSIONAL PROFILE AND TRAINING NEEDS: CONCLUSION

First of all, it is important to underline that the need to implement equal opportunities and conciliation policies should not be seen as a purely legislative or contractual issue, but rather it should be considered holistically: like gender, the policies linked to these topics are firmly embedded in the social context.

This also emerges from the qualitative researches which have been conducted: the interviewees' replies demonstrate that we cannot dwell only on the more "bureaucratic" aspects, we also have to go back and analyse a more "social" dimension.

We can start by analysing the researches on companies. However, we should immediately clarify the following: the perception of the issue of equal opportunities and conciliation policies varies, even greatly, from one country to the next. The different degree of sensitivity is, in fact, closely linked to how the labour market is managed and organised. As is widely known, this is not uniform across the EU. Therefore, when we analyse the researches, we should also bear in mind the territorial differences on the subject.

As regards conciliation of family and professional life, companies claim that they have already implemented various working arrangements, for instance, part-time and teleworking, and evaluation methodologies on the application of these policies. This assumes lifelong learning (i.e. bilaterally, both by companies and directly by the female and male workers) as well as considerable expenditure in terms of time and work required to achieve this.

This could have extremely positive consequences for companies as the higher level of conciliation equates to better performances and improved motivation of female and male workers.

However, companies should not consider equal opportunities and conciliation simply in terms of profit, but there should be an exchange, even of a political nature, between companies and their employees. To be really effective, these policies should develop from debates between the interested parties on the requirements, needs and difficulties (and, why not, also their specific desires) which should match up when trying to reconcile family and professional life.



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It is also necessary to consider the company's readiness to making sizable efforts to achieve equal opportunities. As mentioned above, this depends on the perception that the companies have of the importance of the phenomenon, which changes considerably within the countries involved in our project.

It is important to underline that this perception is symptomatic of the different contexts in which companies operate. In frameworks where a basic scheme of equal opportunities has already been internalized, the problems will be completely different to those experienced in contexts where the foundations still have to be laid.

We can schematise the results of the researches in two macrosections.

The first refers to the importance of equal opportunities and conciliation policies for the trainers who were interviewed.

From their answers, three main levels emerged, which we should consider when preparing training courses on these topics:

- 1) an organizational level, regarding the most practical aspects, for example the place and manner of working and conciliation with the issues pursued by the participants;
- 2) a methodological level also relating to the methods of addressing the gender perspective - and not only this;
- 3) language (daily and formal) is fundamental in shaping gender-related issues and relations between genders as regards their specific concerns;
- 4) a 'content-focused' level, which on the one hand goes into further detail on the issue of conciliation of one's personal, family and work times, while on the other analyses stereotypes on how social roles are imposed and conveyed.

While, the second macro section refers to the actual usefulness of such a training course. All the trainers interviewed agreed on this point, although each one of them would then contribute their own expertise in order to outline "practical" dimensions.

Crossing the two macrosections, we can envisage training courses comprising different dimensions:

- an in-depth analysis on gender issues and their social implications, as well as the conveyance and changes in social roles over time and geographic extension;
- a debate and in-depth consideration on the trainers' personal experiences as without this there would not be the empirical bases (or they would be weakened) for achieving effective and sound gender policies;



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- understanding the social and family background of female and male workers, as their position on the labour market and their way of operating in it are firmly linked to existing gender conditions;
- proposing some gender and time conciliation policies, although focusing on the personal and collective contributions to these. We should not therefore draw up rigid policies, but rather we should allow female and male workers to actively participate in their formulation.



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## FOCUS GROUPS

### ITALY

#### CHARACTERISTIC OF RESPONDENTS

##### Gender of respondents:

The respondents are all women, working in different sectors, but all from the same geographic area (Veneto):

Women 100%

##### Professional profile

- 1 lawyer
- 1 project manager
- 1 project designer
- 2 stager
- 1 employee
- 2 trainers
- 1 free trader.

We think it's important to specify the professional profile, because the work environment can influence the perception and the meditation on the theme of equal opportunities and conciliation.



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## POST-TRAINING SURVEY

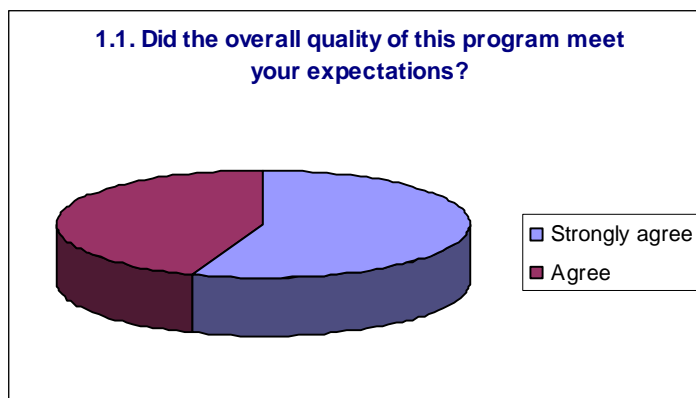
*The questions of the first section concern the general evaluation.*

*As you could see, the training has satisfied the respondents, so we won't comment on this section.*

### Section I - General evaluation

#### 1.1. Did the overall quality of this program meet your expectations?

|                |   |
|----------------|---|
| Strongly agree | 5 |
| Agree          | 4 |



#### 1.2. Was the training effective in teaching the program objectives?

|                |   |
|----------------|---|
| Strongly agree | 4 |
| Agree          | 5 |



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## Section II

3.1. At the beginning of the training, your interest in the subject matter was:

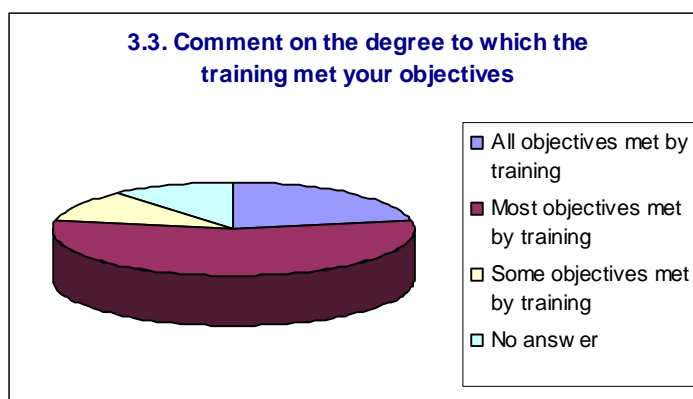
|        |   |
|--------|---|
| High   | 6 |
| Medium | 3 |

3.2. Your interest in the program is/was:

|                       |   |
|-----------------------|---|
| Personal development  | 8 |
| Any particular reason | 1 |

3.3. Comment on the degree to which the training met your objectives:

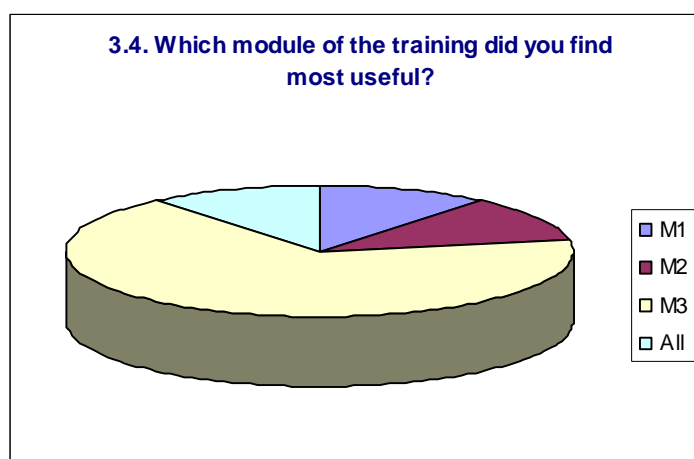
|                                 |   |
|---------------------------------|---|
| All objectives met by training  | 2 |
| Most objectives met by training | 5 |
| Some objectives met by training | 1 |
| No answer                       | 1 |





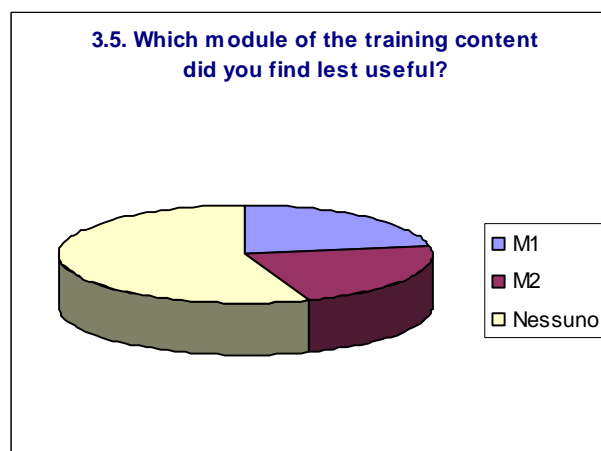
### 3.4. Which module of the training did you find most useful?

|  |   |
|--|---|
| M1 - Introduction to gender policies                 | 1 |
| M2 - Overview of the main issues women-labour market | 1 |
| M3 - CSR and gender equality                         | 6 |
| All  | 1 |



### 3.5. Which module of the training content did you find lest useful?

|  |   |
|--|---|
| M1 - Introduction to gender policies                 | 2 |
| M2 - Overview of the main issues women-labour market | 2 |
| Nessuno  | 5 |





Last two questions are interesting: modules reported as less useful are the first two, which act a sort of introduction to equal opportunities. Although the third module is the most significant from the point of view of workplace, it is important to note that there cannot be an evolution of gender equality and conciliation policies if we don't discuss, even critically, on social and working background (the object, precisely, of first two modules).

Therefore we must find out ways to stimulate interest in these topics, and think about how to involve more workers on these issues.

### 3.6. You think the training was:

|             |   |
|-------------|---|
| Interesting | 8 |
| Innovative  | 1 |

### 3.7. Judge the presentation of:

#### M1 - Introduction to gender policies

|           |   |
|-----------|---|
| Good      | 4 |
| Very good | 4 |
| No answer | 1 |

#### M2 - Overview of the main issues women-labour market

|            |   |
|------------|---|
| Sufficient | 2 |
| Good       | 1 |
| Very good  | 6 |

#### M3 - CSR and gender equality

|           |   |
|-----------|---|
| Good      | 3 |
| Very good | 5 |
| Excellent | 1 |



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### 3.8. Judge the applicability of:

#### M1 - Introduction to gender policies

|            |   |
|------------|---|
| Sufficient | 2 |
| Good       | 3 |
| Very good  | 3 |
| Excellent  | 1 |

#### M2 - Overview of main issues women-labour market

|            |   |
|------------|---|
| Sufficient | 2 |
| Good       | 3 |
| Very good  | 3 |
| Excellent  | 1 |

#### M3 - CSR and gender equality

|            |   |
|------------|---|
| Sufficient | 3 |
| Good       | 4 |
| Very good  | 2 |

### 3.9. Did you expected something more from the training?

|           |   |
|-----------|---|
| Yes       | 2 |
| No        | 6 |
| No answer | 1 |

#### 3.9.1. If yes, what?

- a more detailed description of good practices on conciliation;
- materials, some copy of the slides.



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### 3.10. Other comments on the training?

Five respondents didn't answer.

- *very well organized training, both for the methodology and for the contents;*
- *more time to study deeply debates and issues;*
- *I would like it to have a sequel;*
- *very interesting, it would become even more so if there were not only female participants.*



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## FOCUS GROUPS: ITALY - CONCLUSIONS

In conclusion, we highlight the following points:

- the training was very positive, it has stimulate the attention and the interest of the respondents, who are overall satisfied and would like this training not to be only of 8 hours;
- the time should be not underestimated. Trainings of 8 hours have some positive sides, such as saving time and mobility; but they have also negative sides, because the topics risk to be condensed, and so they risk to become boring, or poorly implemented;
- from the considerations of the last questions, comes out a significant element: the necessity to include not only women, but also men. It's not a problem to underestimate: gender issues concern all of us, and they need a collective meditation to grow up;
- from the questionnaire, come out that there's a superficial interest on talk about the more socio-logical part of gender policies: this part has to become more dynamic and practical, involving the participants and inviting them to talk about their everyday life and their experiences;

One methodological notice: it could be useful to practice some recommendations:

- the multiple-choice questionnaires are simple to use, but they have the negative side to give very limited informations;
- the open-answer questionnaires, or interviews, have the positive side to give us more informations about a respondent, his/her workplace and everyday life, his/her perception about gender discrimination, etc.; but they have the negative side to be very long, and often people have no time to pay attention to them;
- we could think about a different way to take informations, more dynamic and qualitative, with the aims to avoid the risk to have limited surveys - about a theme, moreover, that couldn't be analyzed just on empirical data, but whose experiential dimension is fundamental.



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## POLAND

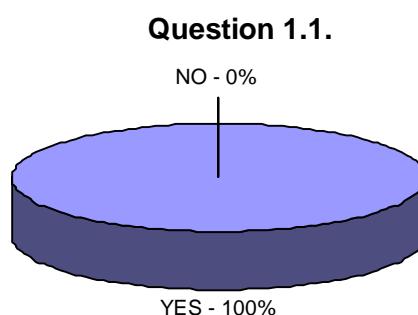
### CHARACTERISTIC OF RESPONDENTS

Seven trainers/teachers took part In the research which In everyday work encounter equal opportunities and work-life balance problems. Majority of the respondents are employees of training institutions and academic teachers which are often invited by firms, organizations or institutions to participate or to lead workshops in above topics.

### SECTION 1. TO ANALYZE THE INTEREST OF TEACHERS AND TRAINERS ON EQUAL OPPORTUNITIES AND WORK-LIFE BALANCE ISSUES

#### 1.1 Are Equal Opportunities and Work-Life Balance issues relevant in your professional activities ?

|     |          |
|-----|----------|
| YES | 100% (7) |
| NO  | 0% (0)   |



If positive, Which are the main aspects (you can choose more than one aspect) ?

#### Organizational:

- selection of training program and working methods;
- composition of courses adapted to training participants;



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- trainings directed to directors for human resources development, human resources department directors, human resources managers, human resources managers responsible for individual areas of functioning, training departments' managers, companies' owners, workers of human resources departments, managers, members and employees of NGOs;
- place and time of the training adapted to participants;
- 1-2 day trainings, and also 3-day workshops;
- participants receive training materials and diploma to finish the course;

#### Methodological:

- subject - gender studies;
- legal, economic and psychological knowledge and practical skills concerning flexible work forms;
- to acquire self-confidence, confidence and effectiveness in contacts with employer; adaptation of work conditions to parents' needs;
- discrimination, mobbing at work; existing forms, legal regulations and its practical use, employers' responsibilities, managers' responsibilities, legal practices; enrichment of practical knowledge about equal opportunities at work and employers' responsibilities in this area; mobbing problems explained in wide and in experts way;
- increasing awareness and knowledge concerning equality among projects' leaders using public funds, including EU funds; also giving practical skills to projects' teams so they include equal opportunities perspective during process of projects' management;
- how to observe of adherence to regulations and anti discrimination procedure - what to do when discrimination act happens;
- coaching understand as internal process of developing awareness of effects and causes of relations, events, life changes, positive aspects of everyday life, good communication skills; moderated discussions, exercises, practical tasks in small groups which will answer the question: what is the meaning of work and relationships in a person life.

#### Content:

- institution and experiences of motherhood; women as leaders; glass ceiling problem; hidden areas of women creativity, unpaid women work;
- Why work-life balance is important?; Conditions for flexibility; flexibility options - solutions; Basic legal regulations of using flexible work forms; Implementation procedures for flexible work forms; skills useful in flexible work forms; Efficient time management;



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- scope of equal opportunities; equal opportunities in remuneration of women and men, employed part-time, new employees; labor law concerning „equal salary for the same job position”; equal opportunities of women and men In work relations; a job appraisal and conditions for its use or discrimination (direct, indirect; discrimination based on gender/sexual harassment); employer’s responsibilities concerning discrimination prevention; HR managers responsibilities concerning discrimination prevention;
- self-management and self-guidance; self-management In time; designing business plan to realize life goals in harmonious way; strategies and tools for realization of life business plan; Other training topics: assertiveness supports effectiveness of actions; realization of one’s needs without disturbing rights of others; building proper relations with other people; Building assertive attitude at work and in private life; consequences and standards in realization of life goals
- introduction of gender issue to all spheres of life; explanation of term „gender mainstreaming” - including equal opportunities perspectives to main policy trend - what does it mean In practice?; gender stereotypes and their influence on NGOs’ actions; realization of equal opportunity policy in Poland and EU, including inequalities on labour market - with reference to new programming period 2007-2013 and European Year of Equal Chances for All; legal bases in realization policy „Gender Mainstreaming”; „Gender mainstreaming” in practice;
- stereotypes; consequences of traditional life roles: social, economical and personal; analysis of needs of both women and men; elaboration of assessment of the situation based on the analysis; formulating action aims taking into consideration perspectives and experiences of women and men; elaboration of proper program activities and methods of realization;
- fast relaxation, effective recuperation of the body, communication with our own needs and partner’s expectations, understanding and acceptance of other person’s differences, how to act in conflict/stress situation, recognition of stereotypes and their effects in every day life, identification of one’s own competences and perspective of personal/professional development.



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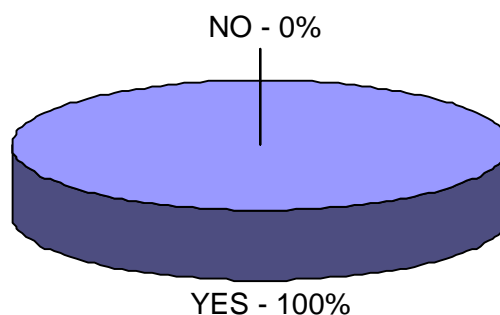
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## SECTION 2. TO ANALYZE THE INTEREST AND AVAILABILITY TO APPLY FOR A TRAINING

2.1 Do you think useful for you to apply for a training concerning the Work - Life Balance issue?

|     |          |
|-----|----------|
| YES | 100% (7) |
| NO  | 0% (0)   |

**Question 2.1.**



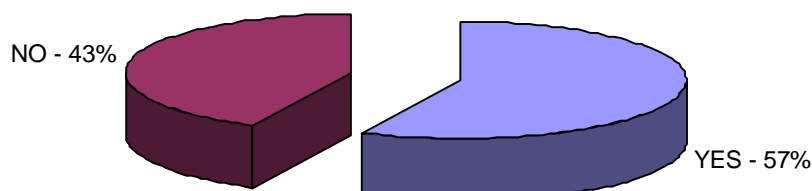
If positive, How many hours can you dedicate to this training?

None of the respondents specified time they could dedicate to the training. According to them, it depends on frame and content of the training and also on level they could upgrade their qualifications to.

2.2. Have you ever carried out training like that (focused on these issues) in the past?

|     |     |
|-----|-----|
| YES | (4) |
| NO  | (3) |

**Question 2.2.**





#### If positive, Which were the results?

- increase of participants awareness and level of knowledge about flexible forms of work which will allow them to easier balance work and personal life, acquire skills of proper using law regulation concerning flexible work forms and their practical use which will make easier for them to choose form of employment; knowledge of influence techniques in order to convince employers that flexible work forms have advantages; breaking stereotypes concerning women role in personal and professional life;
- improvement in effectiveness in realization of professional and personal goals, understanding of real connections between different spheres of life and roles, increase of influence area, discovering one's own unused resources, protection against syndrome „to be burn out professionally”;
- to determine borders of freedom and tolerance, empathy ability and understanding of different mentality processes, experiences of a partner.

#### 2.3. Which specific aspects do you think are useful to analyze and tackled?

- elimination of barriers and restrictions preventing women from making a career;
- fight with social and cultural stereotypes, which lie at the bottom of difficulties in balancing work and personal life;
- elimination of discrimination In work place;
- prevention of wrong understanding of workaholics, which unfortunately has social consent;
- empowerment and *gender mainstreaming* are strictly connected with each other but in practice this fact is very often passed over;
- each firm, company and each human being should understand the values which are brought by society, organization free from discrimination;

#### 2.4 Which issues you consider not useful to be tackled?

None of the respondents could mention such issues.

### SECTION 3. COLLECTING INFORMATION ABOUT OTHER TEACHERS/TRAINERS THAT COULD BE INVOLVED IN THE TRAINING?

#### 3.1. Do you know other teachers/trainers interested in this kind of training/initiatives?

Majority of respondents did not answer his question. Three respondents admitted to know such persons but they do not know whether they will be interested in the trainings.



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## PORTUGAL

The main goal of the **Focus Group** is to analyze and identify some practices and/ or the interest of Portuguese Organizations on equal opportunities issues and Work Life-Balance;

Thus, on 25<sup>th</sup> of February 2009, ANJAF invited 8 organizations, and the main topic discussed around the following questions:

### 1) Did your company develop policies and/or practices on reconciliation? Which?

All participants consider that it is not possible to disassociate family life from work. Thus, the majority of the companies invited have some policies and practices in order to offer some services and forms of promoting work-life-personal balance.

The most frequently services provide are: nursery, kindergarten holiday camps for worker's children. And cafeteria serving meals at low prices, sometimes the cafeteria can also be used by family members. Some companies also have flexible work organization like extended leaved periods, compressing working hours into a shorter week so as to increase the number of free days available for rest and family life.

### 2) Is you company thinking on implementing other practices on reconciliation of family, professional and personal life?

The majority of participants consider that is it important to continuous improvement of the practices and policies already implement and study new practices according to the necessity of their employee.

Some participants also focus that there are some practices which are quite difficult to implement, nevertheless the importance for companies' employees. In fact some practices involves some structural change which is not possible to implement, these include measures relating to working conditions, which can be more restrictive or the needs of personal and family life. For instance, care services for the elderly, arrangements that make it easier for them to support elderly family members.

Another practices identified for the majority of participants was the possibility of homeworking, or Adopt teleworking practices, particularly for staff who live a considerable distance away from their workplace.



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### 3) Since there's an economic/ financial crisis, do you think that reconciliation policies will support companies' competitiveness? Why?

Participants focus although the economic/ financial crisis, reconciliation policies can play a fundamental role on companies' performance. In fact, they highlight that innovative forms of works, such reconciliation policies can make the difference and be an important strategy in terms of increase productivity and motivation of workers.

Participants have found a positive relationship between a workplace culture that is supportive of work-life balance and use of work-life provisions.

People tend to be more motivated in the workplace if they feel appreciated and respected, creating a positive work environment and reconciliation policies contributes to a better work workplace culture, employee engagement, and productivity.

Finally, participant focus that human resource are the add value of any company, thus their satisfaction on work is one of most decisive factor to increase companies' competitiveness.

### 4) Which are the main reasons for your company to improve reconciliation policies?

All participants agree that reconciliation policies strongly contribute to: reduction of absenteeism, increase productivity, responsibility and company loyalty; improve work performance, and consequently a reduction in terms of cost of the companies.

### 5) In terms of strategic management, did your company identify the advantages in terms of cost/ benefits on improving work-life balance policies?

Perhaps the attractiveness, and maybe even success, of work flexibility practices is due to their capacity to allow employees to maintain quality work performance by arranging their work around personal demands, which may result in a win-win relationship for both the employee and organization.

Participant found a correlation between self-rated productivity, flexibility and satisfaction with work-life balance, and between satisfaction with work-life balance and enjoyment of one's job.

Participants conclude with a model that relates productivity to good management, flexible working, and satisfaction with work-life balance and enjoyment of one's job. While productivity comprises a combina-



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tion of complex factors, flexible working options are perceived by working parents to be a key factor in their productivity.

In fact, employees give extra effort to their work. Reconciliation policies are one of the outcomes of employee engagement, which also involves a mental and emotional commitment to the job/organisation.



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## SWEDEN

### 1. Participants

8 participants (7 women/1 man) - researchers, consultants and trainers, including gender equality experts. All participants had been involved in or were about to initiate gender equality projects in organisations. Some participants were specialists on environmental management systems, others on management and development work with SMEs.

### 2. Application

Analysing the professional profile and training needs amongst VET teachers and trainers in the field of FRO in Sweden through focus groups.

### 3. Themes

The themes covered by focus group were:

1. FRO Management System
2. Gender equality versus FRO, Sustainable Development and (C)SR
3. Methodologies and Management Systems for Gender Equality in Organisations
4. Tailor made Training for SMEs
5. Training Needs and Training Modules

#### 3.1 FRO Management System

Before the focus group all participants had received the FRO Management System. For those familiar with systems such as ISO it was easy to understand the system but for the others it was more complicated. The participants immediate reactions were that the System:

- Might reproduce gender inequalities rather than promote equality
- Include a lot of issues that are already covered in Swedish legislation for example the new Discrimination Act and The Work Environment Act. The Social Welfare model also secure for example access to child and elderly care. Furthermore some things are covered by the collective bargaining and agreements.

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In terms of reproducing gender inequalities the participants especially referred to the working practices and issues around flexibility. Both practice and research has shown that introduction of higher flexibility - in working time and work place - might reinforce segregation based on gender and ethnicity. Flexibility was during the 80s and 90s seen as an important step towards equality but is nowadays debated. There is a need of major revision of the Management Systems if it going to be applied in Sweden. A system combining the Acts mentioned above and (C)SR reporting would be a good point of departure according to the group.

### 3.2 Gender Equality versus FRO, Sustainable Development and (C)SR

For all participants' issues around gender equality, diversity and sustainability in organisations was of more interest than the issue of family responsible organisations i.e. confirming previous results during the FRO project. Parent Friendly is a concept possible to use in the Swedish context.

CSR was another topic discussed due to the increased interest for this in Sweden. Recently the attitudes towards CSR has change in Sweden and one explanation could be the fact that all the state owned companies are required to report according to GRI. In Sweden diversity and gender equality is often (but not always) perceived as an integrated part of CSR.

Sustainable development is a well established concept in Sweden that according to the participants in the focus group might be easier to act upon. There has also been a lot of projects in the area such as '*The sustainable company - focusing on gender equality*' funded by ESF from 1999 and onwards.

### 3.3 Methodologies and Management Systems for Gender Equality in Organisations

Participants in the focus group with less experience of working directly with gender equality in organisations (i.e. the one's that were about to launch projects) asked for practical methods for "gender mainstreaming" in companies such as check lists and management systems. During the focus group participants discussed different available systems that have been tested in Sweden such as Balance Score Card, Gender Equality in Management Systems, EQ 2000, 3R etc.

The group discussed consequences of different methodologies in terms of whether a method preserve the system or actually change the system. This can be compared to the discussion whether women (and men) should adapt to the existing patriarchal systems or if the organisations should adapt to new demands from the work force, both women and men. It can also be compared to the discussions around gender mainstreaming, which is a strategy increasingly questioned both in Sweden and other member states.

Participants with experience of working together with companies asked for methodologies for coaching,



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mentorship and applying a “doing gender” perspective in practice. “Doing gender” is increasingly influencing practices in Sweden, according to the participants. The effects on practices can be explained by the close cooperation between gender researchers and gender experts in different interactive research projects in companies and organisations as well as in clusters of companies. New methods are emerging based on research in the field and consultants are offering competence development for organisations in “doing equality”. Some argue that gender mainstreaming does not differ from regular organisational development work and therefore no specific method is needed. Specific knowledge and competencies in gender equality and change management are more important in order to succeed.

### 3.4 Tailor made Training for SMEs

Participants underlined the importance of motivating SMEs and the need of trainers to learn more about successful “arguments” to trigger the interest among companies. Benefits for the companies must be concrete argued several of the practitioners. Training has to be linked to concrete projects/initiatives aiming at promoting gender equality, (C)SR or childfriendly/parentfriendly organisations in order to attract interest among SMEs.

Some of the participants had direct experience of working with SMEs and further stressed the importance of tailor made training. SMEs have limited resources for training, do not access the same type of structural capital and perceive difficulties in implementing complex management systems. One of the successful programs mentioned was the krAft programme and a FRO competence development could be arranged in the same way.

In krAft higher education institutions, and especially their business schools, collaborated with managers and consultants from the business community, small and medium-sized business enterprises (SMEs) and private and public support organisations. One important factor behind the establishing of krAft was a growing dissatisfaction with existing models for how courses and programs for business managers and leaders were organised. In many of those the underlying pedagogical assumption was that you bring together individual managers (leaders) from different companies into a learning program. This is designed to help the participants grow as individuals with the futile hope that they will translate and transform their new (theoretical) insights into action “back home”, which seldom happen. The main form of work in the krAft programme is the network, where all participants meet together to reflect and learn from each other and from people invited to the group. In krAft the “theory first and then application” idea

is reversed, based on an understanding that learning is always contextual, involving cognitive, affective, social and behavioural dimensions concurrently. The development tasks of the individual krAft programs have varied and could for example focus on a topic such as FRO.



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### 3.5 Training Needs and Training Modules

In terms of training needs the participants in the focus group highlighted the importance of learn more about practical measures, how to anchor ideas on gender equality, how to act as a change agents, diversity ambassadors etc, how to motivate managers and staff, how to handle resistance and how to work in different sectors. Furthermore it became obvious during the focus group that a FRO course, in Sweden, needs to cover basic knowledge on systems such as ISO. Participants experienced in ISO could easily put their new knowledge of FRO into a framework. The professional profile for FRO could include gender equality experts, experts on environmental management systems and (C)SR experts.

In Sweden a lot of theoretical courses are already available on different levels in terms of concepts linked to FRO but there is still a need for more practice oriented courses on how to succeed in implementing existing policy and legislation, according to the participants. The results from the transnational training were confirmed in the focus group i.e. that the training should target how existing policy and legislation can be implemented. Furthermore the training needs to be short and participants suggested 4-8 hours introduction to FRO and then 4-8 hours follow up were trainees working directly with companies could access expertise advice during the practical implementation phase.

A more extensive program could be launched also according to the well known krAft model where VET trainers and teachers work directly with SME managers and researchers.

According to state of the art research, results from numerous practical projects and the focus group training modules could cover (1) Governance - Gender Equality Policy, Legislation, Goals: (2) Tools - Knowledge about gender equality and change management: (3) Arena for Change - Organisational Context: (4) Resistance to Change.

In line with the suggested training manual the Swedish focus group agreed that it is important to familiarise with

- existing policy and legislation (Module 1),
- gender equality linked to (C)SR (Module 2) but also to the ongoing dialogue around Sustainability
- parts of the FRO system applicable to Sweden (Module 3) linked to Module 1

Module 3 needs to cover some basic knowledge about management systems such as for example ISO.



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## OVERALL CONCLUSIONS

This conclusion aims "to put together all the tesserae" of the pathway that was presented.

We have not concentrated on a general sort of summary, but we want to put together the focal points and the weaknesses that emerged from the desk analysis, from the report on the interviews and from the focus groups, in order to provide an overall vision, which can serve as the basis for defining the most appropriate training pathway.

### DESK ANALYSIS AND REPORT

Two main subjects were involved in the desk analysis and the report on the interviews: enterprises and the female/male trainers.

#### Enterprises

The enterprises can be analysed using various dimensions.

From the desk analysis and from the report, it emerges that enterprises have a good degree of interest in implementing gender and reconciliation policies. It is now necessary to understand which actions will actually help shape these policies.

First of all, it should be emphasised that these actions will have to be included in a social, economic and territorial context.

**Social**, because the female and male workers involved have different lives and origins, therefore they do not have standardized lives, i.e. based on a single standard (in economic terms) because men/women have salaries and economic backgrounds which can be very different (for instance, just think of the gap that exists between a manager and a cleaning staff person), and therefore not all men/women have the same resources, above all if we also take into account family responsibilities.

**Territorial**, because an enterprise cannot be unconnected to the national context, but above all from the regional and local ones. Therefore, different enterprises, set in different contexts, will have their own catchment area, their own "population" of female/male workers, their own management of relations with them, etc.



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Thus, with these premises in mind, interventions by enterprises should be carried out along the following lines:

- analysis of the typologies of female and male workers in the enterprise: bearing in mind the context of their origin, both in economic and social terms (and focusing special attention on female and male immigrant workers);
- involvement of the female and male workers in decision-making on and implementation of gender and reconciliation policies;
- the exchange between an enterprise and its employees should not be top-down, it should be of a dialectical and participatory nature.

### Trainers

The issue of female and male trainers reveals various aspects.

Firstly, we should not view them as a homogeneous group. The differences between the trainers can be seen both in terms of qualifications and experience, but also at territorial level among the different regions which are taken into consideration. Moreover, the trainers interviewed came from different enterprises, also within the same territory.

Therefore, when we analyse the replies given by the trainers, we should bear this heterogeneity in mind.

As regards their position in a training pathway on equal opportunity policies, we can say that these have the more "dynamic" task, as they are affected by the enterprise's requirements for greater competition and production, but also by the reconciliation needs of female/male workers.

We have identified the following focal points for the female/male trainers:

- a greater participation of the subjects which are to be trained;
- this participation should be based on a bilateral exchange between trainers and female/male workers which implies a less formal way of relating to one another in favour of a more collaborative one.



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## FOCUS GROUPS

The following questions have emerged from the analysis of the focus groups:

- What type of perception is there of the reconciliation policies, both by the enterprises and by the workers? The perception that they have of the phenomenon is fundamental for laying the ground for reasonable and sensible reconciliation policies;
- Do enterprises have the tools and skills needed to develop new policies, as well as new methods for discussing and managing issues related to this subject?
- Why are some policies and practices considered "unfeasible"? What are the weak points in their organisation that do not allow these to be implemented?
- What are the most significant dimensions to be taken into consideration in the cost/benefit analysis of reconciliation policies?

## REMAINING WEAKNESSES

Despite these premises, the following weaknesses remain:

- There is still a superficial awareness of what gender and reconciliation policies really are;
- Practical experience, in terms of dialogue and comparison of these policies, is lacking;
- There is a low propensity to elaborate different strategies and daily practices;
- There is a low involvement of female/male workers, and there is a lack of an in-depth analysis of the social, economic, territorial, cultural context (above all as regards female and male immigrant workers).



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## FINAL PROPOSALS

In trying to design a course that takes into account all the above-mentioned dimensions, we should consider the following points:

- an in-depth analysis on gender and its social implications, as well as the transmission and the changes of social roles over time and in terms of space. This analysis should also take into careful consideration the social, economic, territorial, cultural and political context;
- this analysis should be followed by careful contemplation of one's daily life, by everyone concerned, in order to be able to abolish those elements that do not allow equal opportunity policies to be put in place;
- ample room should be given to female/male workers to allow them to contribute, both personally and collectively, to the enterprises' plans for gender and reconciliation policies. We should therefore not devise rigid policies, but rather policies that are created through the active participation of all parties.



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