European Sectoral Social Dialogue Committee of Local and Regional Government

REVISED CEMR-EPSU GUIDELINES TO DRAWING UP GENDER EQUALITY ACTION PLANS IN LOCAL AND REGIONAL GOVERNMENT

(Adopted by the plenary on 10 November 2017)

Introduction

CEMR and EPSU first adopted the guidelines to drawing up gender equality action plans in local and regional government in 2007. The social partners now consider it necessary to reflect the progress made and the new challenges that gender equality entails, both for employers, employees and service users. Structural reforms and austerity policies that have been implemented in some countries have had a particularly negative impact on women and the demographic challenges of ageing populations raise the need to continue to focus on equality policies to ensure that women are not disproportionately affected by the increased demands for care. It is necessary to ensure that women do not carry most of the responsibility for new care needs arising from the ageing population.

The social partners recognize the importance of gender equality in all spheres of public life and the key role local and regional authorities can play in promoting gender equality in their communities, both as employers and service providers. The present guidelines exclusively address the employment and working conditions aspects of gender equality in local and regional administration.

The guidelines reflect national and European experience, and in particular draw on the following documents:

- 2007 CEMR and EPSU guidelines to drawing up gender equality action plans in local and regional government
- The CEMR European Charter for Equality of Women and Men¹
- 2016 Toward CEMR – EPSU Framework for well-being at work for local and regional governments.
- CEMR – EPSU Report on Equality, diversity and non-discrimination (gender)

¹ CEMR equality charter http://www.ccre.org/docs/banner_charter_en.doc - available in 15 languages
1) Why gender equality is a priority in local and regional government

Gender equality and diversity are core values in the European countries. The role of local and regional administrations is crucial for the sustainability of a socially and geographically balanced Europe, through the provision of local employment and services which meet the needs of all sections of the local community. However, they are facing huge challenges as a result of austerity and the ageing population. It is therefore essential that local and regional authorities have the competence to develop and implement policies aimed at gender equality.

Local and regional governments have been pioneers in the implementation and evaluation of plans aimed at achieving equality between women and men. Local governments, as employers, play a key role in achieving real equality among all people and, from their role as service providers, are a benchmark for the private sector.

Gender equality will strengthen women’s connection to working life. There will be more full time work and reduction of work absenteeism. The working environment and quality of services will improve. It will give Local and Regional authorities greater opportunities to select and retain leaders and employees.

Adequate and up-to-date information and training on equality for workers and managers is a key to ensure good employment practice and quality services. This also applies to those involved in procuring services on behalf of local and regional governments.

The social partners are committed to the objective of strengthening the European social dialogue in the local and regional government sector, consistent with the recognition of the general principle of local and regional self-government, by promoting quality local and regional government services based on the values of social and environmental responsibility.

We are also committed to promote the ILO decent work agenda that includes job creation, rights at work, social protection and social dialogue, with gender equality as a crosscutting objective\(^2\) and to promote and share good practices on work-life balance and gender equality measures.

The social partners are committed to making gender equality one of the four strategic pillars in which, on a cross-cutting basis, the efforts of EPSU and CEMR will rest.

Equality is about creating a fair society, where everyone can participate equally and where everyone has the opportunity to fulfil their potential. Gender equality means giving equal freedom of choice, empowerment and participation to women and men in all spheres of public

and private life. Equality can be pursued in two main ways. This is known as the dual approach and each process is complementary to the other. This includes:

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

The 2017 EPSU-CEMR guidelines aim to support regional and local initiatives on equality, and to encourage a joint, long-term and sustained approach to equality by EPSU and CEMR members. As such EPSU-CEMR is providing a framework to develop best practice and to check progress. Appendix 2 sets out an equality checklist that can be used to assess equality performance over time. Equality plans are also a useful tool to help better implement equality legislation or other equality objectives. A template for a gender equality plan is proposed in Appendix 3.

### 2) EU legislation and social partner agreements on equality

There are a wide range of EU legal instruments that support gender equality. These are listed in Appendix 4.

The social partners at the national and European levels have been instrumental in negotiating agreements that contribute to gender equality, including directives on part-time work (1997) and parental leave (1994), and a Framework of Actions on Gender Equality (2005).

The Framework of Actions on Gender Equality, agreed between the social partners ETUC, CEEP and BUSINESSEUROPE-UEAPME, has specified actions in four areas:

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

The framework highlights actions that need to be taken by employers, trade unions and governments in achieving gender equality and meeting the EU2020 strategy objectives. Social partners are required to address gender gaps and inequalities, and to promote a more

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3 See Appendix 1 for definition of gender mainstreaming
balanced participation of women and men in decision-making. Annual reports are provided from each country on the implementation of actions under the four broad headings. The EU sectoral social partners can also contribute to the reporting process.

The 1976 Directive on equal treatment in employment, vocational training, promotion and working conditions encourages the social partners to introduce provisions on equality. In 2002 the Directive was revised, and now encourages the drawing up of equality plans. In particular, it encourages promoting equal treatment for men and women in the workplace in a planned and systematic way as a way of implementing equality in the workplace through a social partnership approach.

In some countries there is specific legislation obliging public and/or private sector employers to draw up and implement equality plans (see Appendix 5). Last, the European Council of 22-23 March 2006 adopted a European pact for gender equality that, among other things, recommends the further development of gender disaggregated statistics and indicators. The current framework for EU policy on gender equality is set out in the European Commission’s Strategic engagement for gender equality 2016-2019. This includes also a package on work-life balance.

3) Gender equality action plans

Equality plans can be drawn up at local, sectoral, and/or national level. They can take into account the situation of both direct employees and other workers providing services for which local and regional government has responsibility.

Equality plans should be drawn up and implemented by employers in cooperation and in dialogue with trade unions and employees and have the support of all levels of leadership. Having a clear and strong political backing is essential to ensure the successful development and implementation of gender equality plans.

Steps to take in preparing a gender equality plan:

Step 1: Set up a joint employer / trade union working group:

The group should discuss and agree the objectives, methodology and content for the equality plan. The group can organise focus groups, surveys or interviews with workers from all grades. This can help capture attitudes to, and perceptions of, equality in the workplace, and any experiences of discrimination or inequality. It is important that information is sex disaggregated.
Step 2: Identify the gender composition of the workforce:
Identify the percentages of women and men in each occupational group or grade. Which jobs are male dominated (e.g., with over 70% men) and which are female dominated (e.g., with over 70% women). Highlight issues such as the distribution of working time patterns e.g. of full-time, part-time, type of employment contract, civil service status, pay levels, career development and training opportunities, and health and safety issues. Consider including information about workers in companies and other organisations providing services to the local authority.

Step 3: Identify where inequalities exist:
From your baseline data, it should be possible to identify specific areas of potential inequality, for example, unequal pay because of bonuses paid to employees who work a certain number of hours or in certain occupations, or poor access to promotion, education and training experienced by part-time workers or women’s occupations. Identifying inequality patterns is a difficult task, which requires a considerable amount of time and a careful analysis of the data.

Step 4: Develop a set of actions to resolve the inequalities identified:
These can take the form of an action plan, which highlights policies that need to be developed, priorities, areas for action, and includes a short and a longer timeframe for implementing actions. The plan should identify who is responsible, how the measures are going to be implemented, and what resources are required to implement the actions.

Step 5: Monitor, report on, and evaluate progress:
Regularly review the progress in implementing actions in the joint social partners’ working group, and ensure that there is an annual reporting system, for example, to the senior management team and to social partner/works council bodies, including the EU social dialogue Committee for local and regional government. This monitoring should also allow for the revision of priorities and objectives with a view to adapt to changes or new developments over time.

Examples of issues that can be addressed in equality plans:
Recruitment and terms and conditions of employment: Are women recruited equally at all levels? Are there differences in employment contracts?
✓ **Training:** Who benefits from training? Do women benefit equally to men? If not, how can this be rectified? Are part-time workers included in training? Is training held at times that are convenient to women?

✓ **Reconciliation of work and family responsibilities:** what are the maternity, paternity and parental leave arrangements? How many men take up leave possibilities and if not many why? What about working time arrangements?

✓ **Health and safety:** What are the issues that impact on women and men? Are specific health and safety issues raised concerning pregnant or breastfeeding women?

✓ **Sexual and other forms of harassment:** How is this addressed? This issue can be identified for example through a questionnaire / survey together with other questions (see Step 1)

✓ **Changes in work organisation or working methods:** What is the impact of this on women's participation in the workforce? Will this encourage or discourage women's participation? How are women involved in discussions about work organisation? What retraining measures are planned? Are they adapted to women's situations?

✓ **Collection of sex disaggregated data (quantitative and qualitative):** Data is an essential part of equality action plans and enables baseline positions to be established, progress to be tracked and monitored, and trends and changes to be marked. It is important that data collection covers all working conditions, including pay and pension schemes

✓ **Equal pay and job evaluation and effects of performance-related criteria for pay and promotion:** Do pay structures discriminate against women? How many women compared with men achieve performance related pay criteria? How many women compared to men achieve promotion?

✓ **Restructuring (e.g. inter-municipal cooperation, outsourcing, privatisation):** Which groups will be most affected? What is the impact on women and men? Are there special measures that can be put in place to support the vocational training of women who are affected?

✓ **Public procurement:** Do public tenders include equality criteria?

✓ **Monitoring the implementation:** This is important for accountability and for measuring the impact and progress of policies and initiatives.

Appendix 3 provides EPSU and CEMR members with a template for a gender equality plan.
4) Reflections and follow-up

The economic crisis and austerity measures in recent years have had an impact on the whole labour market, but most strongly on women, both as employees and as service users. There is therefore real importance and an “added-value” in the social dialogue Committee for local and regional government to promote equality plans.

Through the joint exchange and cooperation of the social partners at local, regional, national and European level, equality plans can continue to be a key instrument to achieve gender equality.

There are still clear structural differences between men and women in the labour market. In order to give men and women equal opportunities in terms of career and wage development, CEMR and EPSU think that active and sustained gender equality work is needed.

Our aim in updating these guidelines is to encourage the active use of gender equality plans by the social partners. The work involves commitment and actions that together can increase gender equality within at municipalities, county councils and regions.

We expect that these guidelines will support social partners to continue and strengthen their work with gender equality.

The social dialogue Committee will evaluate the impact of the guidelines in 2019 (see also Annex 2).
Appendix 1: Glossary

**Gender equality**: refers to the equal rights, responsibilities and opportunities of women and men and girls and boys. Equality does not mean that women and men will become the same but that women’s and men’s rights, responsibilities and opportunities will not depend on whether they are born male or female. Gender equality implies that the interests, needs and priorities of both women and men are taken into consideration, recognizing the diversity of different groups of women and men. Gender equality is not a women’s issue but should concern and fully engage men as well as women. Equality between women and men is seen both as a human rights issue and as a precondition for, and indicator of, sustainable people-centred development.

**Gender mainstreaming**: it can be defined as the promotion of gender equality in all policy areas and activities. In its Communication on ‘Incorporating equal opportunities for women and men into all Community policies and activities’, published in 2004, the Commission defined gender mainstreaming as follows:

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

**Gender pay gap**: it measures the relative difference in the average gross hourly earnings of women and men within the economy as a whole. Eurostat defines the gender pay gap as follows:

“The gender pay gap is given as the difference between average gross hourly earnings of male paid employees and of female paid employees as a percentage of average gross hourly earnings of male paid employees."

**Gender budgeting**: is the application of gender mainstreaming in the budgetary process. It means a gender-based assessment of budgets, incorporating a gender perspective at all levels of the budgetary process and restructuring revenues and expenditures in order to promote gender equality.

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Appendix 2: An example of an equality checklist

Creating an equality local and regional authority
- Do you have an equality statement committing the organisation to promoting equality in its structures, policies and services?
- Do you have an equality policy?
- Are management and trade unions committed to promoting equality?
- Are equality initiatives costed into the budgeting processes of the organisation?
- Are there effective processes for managing equality within the structures of the organisation and in companies providing services on behalf of the authority?
- Do you have a policy on equality in customer and citizen service?
- Does staff know about the policies on equality?
- Are the mechanisms in place to ensure that equality issues communicated clearly to staff?
- Has staff been trained in equality issues?
- Are unions and staff involved in developing equality actions in the organisation?
- Have you considered conducting an equality audit or review of your employment structure and of your services?

Mainstreaming equality into service provision
- How does the authority evaluate how best to serve its citizens?
- Is equality built into the vision, planning and processes of services?
- Do local authorities practice “social” procurement, for example by including equality clause in public contracts?
- Has equality been incorporated into frontline services provision and into customer services?
- Are services provided to meet the needs of a diverse community?
- Are frontline service providers aware of situations where discrimination occurs?
- Are service staff resourced and supported to accommodate equality?

Data
- Are recruitment and existing positions in local authorities monitored by gender (and also by age, disability and ethnicity)?
- Does data collection take place in a sensitive and consensual manner with staff?
- Is data on performance fed back to staff?
- Is data used to assess equality policies and outcomes?
- Is data collected on impact of outsourcing and restructuring on men and women?

Sustaining equality
- Are there short-term and long-term targets established to promote a rolling programme of improvement?
- Are there sufficient financial and human resources to ensure the sustainability of the equality programme?
- Is there a pool of expertise in equality forming in the authority?
Appendix 3: Equality Action Plan template

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Guidance on How to monitor and evaluate a local Equality Action plan

The evaluation should aim at achieving the following specific objectives:

- To know the degree of fulfillment of the objectives of the Plan
- To analyze the development of the Plan process
- To assess the adequacy of resources, methodologies and procedures put in place during the development of the Plan
- To reflect on the need to continue the development of actions
- To identify new needs that require actions to promote and guarantee Equal Opportunities in the company according to the pledged commitment

The evaluation is a decisive phase of every Equality Plan through which a critical assessment of the interventions made is carried out, based on the data and conclusions obtained in the execution and follow-up phase.

For this, it is necessary to develop indicators(*) which allow to obtain a representation, in a total or partial way, of the reality of the organisation; for this reason the better they are built, the closer we will be to reality.

Indicators are the fundamental tool of the monitoring and evaluation process through which to obtain data and information regarding the implementation and impact of the measures contained in the Equality Plan.
The monitoring process will allow us to answer three basic questions, which correspond to the axes around which the evaluation process is structured:

What has been done? □ Evaluation of results
□ Degree of compliance with the objectives set out in the Equality Plan
□ Degree of attainment of expected results
□ Level of correction of the inequalities detected in the diagnosis

How has it been done? □ Process evaluation
□ Level of development of actions undertaken
□ Degree of difficulty found and / or perceived in the development of actions
□ Type of difficulties and solutions undertaken
□ Changes in the actions and development of the Plan based on its flexibility

What has been achieved? □ Impact evaluation
□ Degree of approach to Equal Opportunities in the company
□ Changes in the culture of the entity: change of attitudes of the management team and the general staff, Human Resources practices, etc.
□ Reducing imbalances in the presence and participation of women and man

(*) We can define ‘indicator’ as a measure, number, fact, opinion or perception that points to a specific condition or situation and measures changes in that condition or situation over time.
Appendix 4: EU legislation on equality and anti-discrimination

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

EU legislation: Directives on equal treatment between women and men:
75/117/EEC approximation of the laws of the member states relating to the application of the principle of equal pay for men and women (repealed and recast by 2006/54/EC)
76/207/EEC implementation of the principle of equal treatment for men and women as regards access to employment, vocational training and promotion, and working conditions (repealed and recast by 2006/54/EC)
79/7/EEC progressive implementation of the principle of equal treatment for men and women in matters of social security
86/378/EEC implementation of the principle of equal treatment for men and women in occupational social security schemes (repealed and recast by 2006/54/EC)
86/613/EEC application of the principle of equal treatment between men and women engaged in an activity, including agriculture, in a self-employed capacity, and on the protection of self-employed women during pregnancy and motherhood
92/85/EEC introduction of measures to encourage improvements in the safety and health at work of pregnant workers and workers who have recently given birth or are breastfeeding
96/34/EC framework agreement on parental leave
96/97/EC implementation of the principle of equal treatment for men and women in occupational social security schemes (amendment Dir 86/378) (repealed and recast by 2006/54/EC)
Directive 96/34/EC on the framework agreement on parental leave concluded by UNICE, CEEP and the ETUC
97/80/EC burden of proof in cases of discrimination based on sex (repealed and recast by 2006/54/EC)
2002/73/EC implementation of the principle of equal treatment for men and women as regards access to employment, vocational training and promotion, and working conditions (repealed and recast by 2006/54/EC)
2004/113/EC implementing the principle of equal treatment between men and women in the access to and supply of goods and services

Further information on EU legislation and policy on gender equality can be found on the website of the European Commission’s Directorate-General for Employment, Social Affairs and Equal Opportunities: http://ec.europa.eu/employment_social/gender_equality/index_en.html
2006/54/EC on the implementation of the principles of equal opportunities and equal treatment of men and women in matters of employment and occupation (recast)

Note: this replaces a number of previous directives and amending Directives by bringing together those provisions in a single Directive with effect from 15 August 2009.

Note: the European Commission's work programme for 2008 announces a proposal for a Directive amending Directive 92/85/EEC. The objective of the proposed revision of the Directive will be to promote work-life balance by improving existing maternity protection provisions.
Appendix 5: National legislation on equality plans

Austria: The Act on Equal Treatment for Men and Women in the Public Service (Bundesgesetz über die Gleichbehandlung im Bereich des Bundes, Bundes-Gleichbehandlungsgesetz) provides preferential hiring, promotion and training for women (through quotas) in the public service of Austria. 
Additionally, the Act on Equal Treatment (Bundesgesetz über die Gleichbehandlung, Gleichbehandlungsgesetz) provides anti-discrimination measures for disadvantaged groups in terms of sex, gender, age, origin, religion, disabilities and social status in the private sector. Positive measures to promote the factual equality between men and women as well as other disadvantaged groups are supported through this Act. 
Seven of the nine federal states of Austria implemented federal laws for anti-discrimination and equal-treatment of men and women. These laws contain measures for women promotion programs and preferential treatment of women in the public services of the federal states and local governments.
As example: Styrian Act of Equal Treatment 

Belgium: Private sector employers may voluntarily draw up equality action plans, although in cases of company restructuring this is obligatory. It is obligatory for all public sector employers to draw up equality action plans.

Denmark: Legislation requires that the public sector, state institutions and state-owned companies incorporate equal opportunities in the planning and administration, including a report on equality every two years where there are more than 50 employees. It is estimated that 80% of municipalities have a written equality policy, and 90% of councils. Improving women’s representation in senior posts in local and regional government has been identified as a significant challenge.

Estonia: The Gender Equality Act, passed in April 2004, places on state and local government agencies a duty to promote gender equality. This implies taking into account gender equality issues when planning, implementing and assessing strategies, policies and action plans.

Finland: The Act on Equality between Women and Men (passed in 1986, revised several times, latest 2016). The purpose of the law is to prevent discrimination on grounds of sex and to promote equality between women and men and, to that end, to improve the position of women in particular in employment. The Act also aims to prevent gender identity based discrimination. The law contains the duty of the authority to promote equality, the composition of the public administration and the public authorities, implementation of equality in education and teaching and measures to promote equality in educational establishments, the duty of the employer to promote equality and measures to promote equality in working life. If the number of employees employed by the employer is at least 30, at least every two years, the employer shall draw up a gender equality plan, in particular on remuneration and other conditions of employment, in accordance with which equality measures are implemented. The plan can be included in the personnel and training plan or in the occupational safety and health program. The equality plan must be drawn up in co-operation with a shop steward, a representative of
the trust, a labour protection commissioner or other representatives appointed by the staff. Personnel representatives must have sufficient opportunities to participate and influence.

**France**: Legislation introduced in 1983 provides a legal framework for voluntary equality plans, and legislation passed in 2001 requires companies with 50 or more employees to draw up an annual report on the position of women and men; specific equality bargaining is required at company level. Since 2006, a new law encourages collective bargaining on all aspects of gender equality in local and regional government and provides for the adoption of multi-annual plans relating to access to managerial posts. Such plans will be subject to consultation of a bipartite committee.

**Germany**: Legislation passed in 2001 requires the public sector to draw up equality plans, which also allow there to be preferential treatment of women in areas where they are under-represented, including gender mainstreaming measures.

**Greece**: Although there are not specific legal provisions on gender equality plans, collective bargaining agreements contain measures to promote gender equality. These mainly concern measures of protection of maternity (limited working hours, possibility of early retirement, benefits, child care structures, summer camps, etc.).

**Hungary**: Legislation requires state-owned companies with over 50 employees to draw up annual gender equality plans.

**Iceland**: The Act on Equal Status and Equal Rights of Women and Men No. 10/2008 stipulates that municipal councils shall adopt gender equality plans within one year from elections. Article 12 sets out that every local government shall establish a Committee on equal opportunities in the municipality. The Committee shall advise the local government on gender equality issues, monitor the situation and initiate measures, including positive measures, to guarantee gender equality in the municipality. The Committee is also charged with drafting a gender equality plan for the following four years (the electoral period), where it is, inter alia, is elaborated how gender mainstreaming will be implemented in all fields. The gender equality plan shall also include an action plan on how to remedy gender discrimination the municipality. The Committee shall report on the status of gender equality in the municipality and developments to the Centre for Gender Equality every other year.

**Italy**: Companies can apply for funding for positive action plans, whilst in the public sector positive action plans are an obligation.

**Lithuania**: The Law on Equal Opportunities came into existence in Lithuania from January 1, 2005. It introduced general and specific requirements for equality, concerning age, gender, disability, ethnicity, religion and beliefs. The mentioned legislation determined the system of implementation of the equality principles as well as delegated certain functions to the municipalities and different state and private institutions in following and implementing the principles of equal opportunities. State and Municipality institutions are obliged to make and implement programs aimed at implementation of equal opportunities.

**Norway**: There is a general duty on employers to promote equality and prevent discrimination based on gender, age, functional ability, ethnicity and sexual orientation. However, from 2018 employers are no longer obligated by law to report on equality activities.
**Slovakia:** Although there is no obligation to give gender equality plans, there have been positive developments on equality, including changes to the Labour Code and the creation of a consultative body on gender equality.

**Slovenia:** Public authorities have to produce plans and biannual reports on the implementation of the National Programme for Equal Opportunities for Women and Men.

**Spain:** The Law on Effective Equality between Women and Men (Law nº 3/2007) calls for the drafting of equality plans as a measure to promote equality in public authorities and prescribes the mandatory adoption of Gender Equality Plans for private companies with more than 250 employees. The Basic Statute of Public Employees (Law n. 7/2007) also established the need to adopt equality plans in public administrations. In Spain, plans are therefore adopted and implemented not only at central state level but also at local and regional level. There is no register of GEPs in the public sector at national level. By promoting budget cuts and institutional restructuring, the austerity policies have had a negative impact on gender equality policies and institutions.

**Sweden:** Legislation requires all employers with 10 or more employees to draw up annual equal opportunities plans. 75% of public authorities have such plans.

**UK:** In the UK there is a Public Sector Equality Duty that applies to most of the public sector and covers all protected characteristics, including gender. The duty requires local authorities and other public bodies to reflect gender equality in the design of policies and the delivery of services and keep these issues under review.

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