



COMMISSION  
OF THE EUROPEAN  
COMMUNITIES

V/1604/92-EN

Directorate-General  
Employment, Industrial Relations and Social Affairs

EC-DG V  
Equal Opportunities Unit

Positive Action Network —  
MOTIVATING FACTORS, OBSTACLES AND GUIDELINES

Ogilvy Adams & Rinehart (I&E)  
(Information et Entreprise)

Commission of the European Communities  
Equal Opportunities Unit - DG V.B.4

CONTENTS OF THE SYNTHESIS REPORT

0. INTRODUCTION

0.1. Aim of the report

0.2. Target audience

0.3. Approach

1. SUMMARY OF MOTIVATING FACTORS AND OBSTACLES

1.1. Motivating factors

- better management of human resources
- relations with management
- relations with staff
- internal and external company relations
- long-term investment: technological development and economic requirements
- legislation and public incentives

1.2. Obstacles

- company size
- fear of expense
- fear of organizational change
- lack of a framework and of supporting measures

2. SUMMARY OF GUIDELINES FOR FUTURE ACTIONS

3. GENERAL CONCLUSION

4. ANNEXES

Annex 1: List of motivating factors

Annex 2: List of obstacles

Annex 3: List of national experts

Annex 4: Glossary of abbreviations used for each country

This document has been prepared for use within the Commission. It does not necessarily represent the Commission's official position.

## 0. INTRODUCTION

This report concerns the final phase of the Second medium-term Action Programme on Equal Opportunities (1985-1990) and summarizes the reports of the Positive Action in Enterprises Network's national experts concerning :

- motivating factors in and obstacles to the establishment of positive action schemes in companies
- and the guidelines to be developed in consequence for the future.

In 1988, DG V of the European Commission produced a Guide to Positive Action. This document is intended to supplement this Guide and not to replace or amend it.

### 0.1 Aim of the report

The aim of this report is to identify, with the help of national experts, the main motivating factors in and obstacles to a company's commitment to Positive Action (PA) without determining their relative importance. Obviously, motivating factors alone may be insufficient if steps are not taken to remove the obstacles.

The report tries to identify areas where there is a degree of convergence, even if national differences in outlook obviously exist.

This document does not deal with the special tactics advocated to "sell" positive action programmes. These are the responsibility of each practitioner.

### 0.2 Target audience

This document is addressed to all those who wish to introduce positive action programmes, whether from within company management or as external consultants.

"Employers" is too general a term : the target audience is positive action "practitioners". This document seeks to place at their disposal a summary of experiences at European level.

### 0.3 Approach

This work is based on national experts' reports of their own experience. These reports were drawn up under a contract from April-September 1991. The views expressed may not exactly mirror actual conditions in all the countries covered.

This synthesis report cites numerous extracts from the experts' reports selected for their illustrative value, whereby the intention was not to reprint and collect individual reports in a single document. In the case of each quotation, the country of origin is given in brackets (see Annex 4).

## 1. SUMMARY OF MOTIVATING FACTORS AND OBSTACLES

### 1.1 Motivating factors

(See list in Annex)

(a) The main motivating factor is the contribution of a Positive Action (PA) scheme to better management of human resources as an integral part of company strategy.

In order to maximise its chances of success, a Positive Action scheme must be presented as "an aspect of a strategy for change in organizational development and in the development of human resources."

This factor is important because:

- firstly, it reinforces other motivating factors
- secondly, it makes it possible to tackle numerous obstacles.

"... the greatest factor for success, which enables PA philosophy to be incorporated - quite rightly - into personnel policy, lies in designing a PA programme as a project for organizational change which aims to bring together the company's development and the professional development of women." (I)

"PA programmes presented and used as instruments for managing human resources reduce opposition and arouse keen interest. Making an initial analysis of the existing personnel situation within the organization gives the company the opportunity to identify existing potential and to discover many unexploited and poorly applied talents amongst both its male and female staff." (B)

"The aim of the equal opportunities plan was to define a framework for personnel management ... in a certain number of cases it also established objectives to be attained in various areas of personnel management." (F)

"Motivating factors are :

- the "synergy effect" expected from men and women combining their abilities in mixed groups.
- qualitative changes in work and management styles, resulting from the cooperation of women and men as equal partners at all levels of the hierarchy. (D)

(b) The relationship between PA programmes and company management

Commitment from company management is the key factor in any decision to adopt a PA programme.

It is therefore important to demonstrate at this level that PA schemes are not only beneficial to women but also to the company as a whole, and that the development of the company and the professional development of women are strategically linked."

Commitment on the part of management

- will not only mean that PA schemes are readily accepted and repeated,
- but, in the longer term, will also make it possible to offset any lack of continuity in the programme which might follow a change of management, since the influence of PA schemes on the company's performance will have been officially acknowledged.

"... the support of top management appeared as the factor most widely accepted as determining the success or failure of a PA plan. Developing a strong business case for change was seen as the most persuasive force for change." (UK)

"The best way of encouraging the implementation of PA on a voluntary basis is :

- convincing individual personnel directors and chief executives, by stressing social reasons, fairness and benefits for working environment... ." (NL)

"Motivating factors are :

- genuine, visible top level commitment by the Chief Executive;
- the appointment of a senior manager with full responsibility for equality of opportunity (in the initial stages)." (IRL)

"The Danish Railway (DSB) had included a statement on equal opportunities for staff in its general policy since 1982. In 1988, when DSB designed an equal opportunities policy for the enterprise supported by the General Director and hired an equal opportunities counsellor, changes really started to take place." (DK)



(c) The relationship between PA schemes and staff

Although the effects of PA schemes should usually benefit both men and women, in some cases there has been resistance from male employees, owing to a fear of competition. PA schemes may bring to the fore hidden human resources, therefore enabling a more efficient use of the talents of all members of staff, both male and female. All employees are involved, which is an important motivating factor.

(d) PA schemes and internal and external relations

The implementation of PA gives the company and its management a good image. This has the following positive consequences :

- a positive input on recruitment
- an enhanced image amongst female consumers in certain sectors
- a new approach for management and unions.

However, it should be noted, as regards the latter, that there are significant differences in attitude from country to country.

"Union pressure is leading to the introduction of PA clauses in collective agreements. However, these clauses have not been very effective. PA takes place within the company and union influence on internal organizational processes is weak. The provision of a budget for childcare represents an exception." (NL)

"... In the Danish labour market, the social partners traditionally play a leading role in providing information on equal opportunities on the labour market and particularly on how to set up PA programmes inside companies.

In the Agreement on Equal Treatment (April 1991), the social partners take responsibility for promoting equal treatment by providing information and advice to the joint committees which are responsible for equality in individual companies."  
(DK)

"In the case of unions, an effort was made to help those which encountered the greatest resistance from companies.... For example, a business training project was set up for union representatives of FILTA ICFTU (textiles), so that they might become skilled at negotiating and implementing PA schemes."  
(I)

"Two multisectoral agreements refer specifically to PA schemes:

- the agreement of 1989-1990 provides for the creation of a PA unit at the Ministry for Employment and Labour and for assistance to certain risk groups (many of them women);
- the agreement of 1991-1992 makes provision for funds to launch PA schemes." (B)

In France, however:

"The unions are not the prime movers when it comes to obtaining professional equality. As a general rule, equal opportunities plans are more an expression of the wishes of company management ... The unions seem to have difficulty in deciding what their attitude should be in this situation ... and they tend to prefer familiar ground such as training or pay ...." (F)

(e) PA schemes and Long-Term Investment

- A practical approach associating PA schemes with the human resources strategy (see (a)) guarantees their implementation in the longer term.

In this case "PA experiments and pilot projects" develop into action plans beneficial to the whole company.

- Two other interdependent motivating factors associated with long-term investment are often cited:
- \* THE TECHNOLOGICAL DEVELOPMENT of the company and its sector, resulting in specific training and qualification needs which women can satisfy.

"One positive factor which indicates a change in attitudes is the gradual disappearance, owing to the introduction of new technologies, of the distinction between male and female jobs." (P)

"Equal opportunities plans are one means of increasing women's admission to and participation in the process of technological change and of improving a company's performance.... There is a predominantly female, poorly qualified working population which must in future be directed towards leading-edge technology products ... There is little room here for preoccupations with equality which are not integrated into companies' economic and social strategies." (F)

"Coming back to the motives for positive action most often mentioned by those involved, we conclude that the only reason that carries some weight with private sector organizations is the shortage of young workers felt in a number of technical jobs." (NL)

"Equal opportunities programmes must be examined in the light of technological and structural changes which may have a long-term effect on the progress of PA schemes. An equal opportunities policy may also help to reassure workers, to the extent that it implies better management of human resources." (D)

- \* THE ECONOMIC NEEDS of the company and its requirements :
  - quality recruitment, given the shortage of skilled labour and the decrease in the number of young people entering the labour market;
  - and the retention of skilled staff in the company.

These needs give rise to concerns about equality and commitment to PA. However, although such economic considerations may have a positive effect, PA schemes launched in this way do not necessarily lead to the establishment of a long-term PA plan aimed at improving the position of women in the company, because they are often targeted and limited to "a specific organizational need".

"By far the most important motivation is recognition of the benefits of recruiting women, because of the declining supply of qualified men. Time is working on the side of PA."

(G)

"In the United Kingdom, the main factor associated with change is the under-utilization of human resources." (UK)

"Economic necessity is obviously the employer's main concern.... The majority of companies which have signed the "PA Agreement" tackle problems of recruitment and retention of skilled staff by utilizing the pool of labour which women represent for a whole range of jobs traditionally occupied by men.... Thus, several companies in the metalworking, construction and electronics industries, which were short of skilled staff, have trained unemployed women in technical jobs traditionally reserved for men." (B)

"Associating equality of opportunity with the company's commercial objectives does not mean that all efforts to introduce the anticipated reforms must necessarily be presented as women's issues, even if women also benefit from them". (D)

(f) PA schemes, legislation and public incentives

- Legislation has a legitimatizing role, but is not a decisive motivating factor.
- Numerous companies often have difficulty in accepting the idea of indirect discrimination. If there are no real visible signs of direct discrimination, companies have difficulty understanding why they should launch a PA plan.

"It is proving essential to review pseudo-protective standards because they conceal obstacles to women's participation in the labour market, and to review the statistical concept of absenteeism, since it currently includes absence from work as a result of maternity, nursing infants, helping with children and the family." (P)

"Protective laws may constitute an obstacle.... Numerous companies have informed us of the impossibility of employing women as manual workers on account of the ban on night work, which meant that positive action was only possible for white-collar workers and managerial staff." (B)

"... Public companies which have long pursued an active equality policy as regards contractors and taken into account the problems raised by the "specific characteristics" of female employment have been positively affected by professional equality becoming a legitimate subject of social debate, thanks to the intervention of the legislator." (F)

"Under the government's plan of action, each of the public services has to draw up equality action plans, with fixed objectives and fixed time-tables, and must present annual reports to the Equal Opportunities Council." (DK)

"(Semi)-public organizations foster PA by means of information and grants. Where employers' organizations are involved in these institutions, they often act against concrete steps to foster PA for women. Recently the National Employment Agency, of which the social partners are a part, agreed to employ 50 consultants to further PA for minority groups. However, the Agency rejected a proposal which would have included specific PA schemes for women." (NL)

"... the greatest factor in successfully enabling PA philosophy (the elimination of indirect discrimination and the improvement of women's status at work) to be incorporated into personnel policy, is to set up PA schemes as projects for organizational change.... This highlights not only indirect discrimination, but also the organization's failure to function which results from it." (1)

## 1.2 The obstacles

The principal motivating factor, the contribution of PA schemes to better management of human resources, faces three main obstacles :

### (a) Company size

Small companies may not have concerned themselves with a HR "policy" or "strategy".

### (b) Fear of expense and fear of organizational change

Particularly in times of economic downturn or crisis, companies unfortunately adopt a conservative attitude and do not take any measures which, in their opinion, constitute a risk. Introducing a PA plan may be seen as an "unnecessary expense".

"Obstacles arise from:

- the lack of convincing evidence that PA has an economic return,
- the perception that if a company takes one initiative, it will have to keep going and increase its action." (IRL)

"The scale of changes that need to be achieved is usually so great that, in most organizations, a PA plan will need to be in existence for at least 5 years before any perceptible outcome can be measured and any real changes in attitude brought about. For this reason, a series of strategies needs to be developed from the outset, in order constantly to revive each element of the plan and also to empower those who need to make up for those weaknesses which do occur." (UK)

"PA means change and processes of change cost time and money. PA programmes aim to bring about changes in organizational structures that have become institutionalized ... Changes in these areas are sometimes opposed by the same unions which have declared themselves in favour of PA." (NL)

"Small companies rarely have proper personnel management. Many companies have no management planning. Some companies worry about devoting time and money to actions for which they see no immediate need." (B)

"Except for fairly limited measures ... companies are slow to adopt processes involving substantial change that would often mean changes in the organization of work which they do not wish to undertake." (F)

(d) Lack of a framework and of supporting measures

Once established, a PA plan may collapse, wither away or come to a halt owing to lack of financial incentives or to lack of practical support at national or international level (experts and methodology). A national support strategy is essential.

"The lack of financial incentives (subsidies, tax exemptions, funding) given to companies for implementation of a PA plan represents an obstacle." (P)

"A recommendation should be proposed to the EC Council of Ministers inciting Member States to adopt national equal opportunities programmes at all levels and not simply at work (family law, tax law, criminal law...)." (P)

"The way to persuade employers to finance PA is via selective support of exemplary projects in companies.... The EC must be seen to support such projects because participation in a Commission-sponsored project carries considerable prestige and is something on which we must capitalize. Experts are useful in conceiving, promoting and following up such pilot projects ...." (G)

"Forty or so companies agreed to sign a PA Agreement committing them to carry out pilot projects and (with the help of experts made available free-of-charge by the State Secretariat for Equal Opportunities) to follow that procedure." (B)

"It is difficult to sustain interest in the PA plan after the first cycle of activity, ie. difficult to keep it vigorous and at the centre of organizational activity." (IRL)

"Having launched a PA programme the most difficult stage in the process must then be confronted - how to maintain its momentum ?" (UK)



- (e) Generally speaking, the lack of change in attitudes and stereotypes vis-a-vis women's employment is a significant obstacle to the introduction and success of PA schemes. (SP)

## 2. SUMMARY OF GUIDE LINES FOR FUTURE ACTION

Analysing the motivating factors in and obstacles to the implementation of PA also makes it possible to draw some conclusions about guide lines to be adopted for future action, by drawing on various countries' experience.

These lessons and proposals for improvement are summarized here in accordance with the PA Guide drawn up by the EC in 1988.

### 2.1. Why positive action?

- First and foremost, because it helps improve the management of human resources, by becoming part of companies' strategies for positive change.
- It meets an economic need (the lack of young, skilled people) and addresses the threatened and actual loss of trained and qualified female members of staff.
- It helps take into account the kind of flexibility between work and private life (flexible working hours, parental leave, bringing up and caring for children) which is increasingly being demanded by young executives and white-collar workers.
- To convince employers of the long-term benefits of such an approach for the functioning of the company. In this respect, care needs to be taken to establish and make a success of model cases which, with EC support, might serve as examples to other companies.

- To demonstrate the benefits of long-term, planned action in stages, compared with limited short-term action which has no strategic significance.
- To improve women's access to training.
- To begin a new type of cooperation with the unions.

## 2.2 How to launch a positive action scheme

According to the EC Guide, a PA is a plan carried out in stages (national guides or other reference guides may also exist). PA should ideally be accompanied and supported by the national authorities, in the form of an agreement signed by the parties involved which provides for the assistance of experts, free of charge. A PA plan must also have strategic significance and be linked with the company's corporate strategy.

### 2.2.1. Launch of a PA

The launch of a PA plan must be publicized internally and externally, and be accompanied by supporting measures. Attention must be paid to the following aspects:

- selection of the type of coordinating group (a committee, an adviser or manager, an adviser plus a committee, management plus a committee)
- internal support from female management
- external recognition by the European Commission, and its financial support measures
- transition from words to deeds (moving from the "statement" to an action plan with responsibilities and time-limits)
- a clear initial expression of intent to identify problems, in order to prepare the ground and progress methodically
- avoidance from the outset of lack of clarity, lack of information or confusion of responsibilities and powers.

### 2.2.2. Analysis

This is an important phase and the programme must be based on it. It is this basis which brings credibility.

- Placing independent experts at the disposal of the company is very valuable.
- The company should benefit from all the knowledge already accumulated by others and from the coordinated support of various public and private organisations with relevant expertise.
- PA will be all the more relevant if it is based on internal evidence and experience. Such information can be obtained through interactive seminars, highlighting specific needs and obstacles.

This phase may face a lack of relevant information, since companies do not always have the necessary statistics.

### 2.2.3. Design and implementation

- It can only be beneficial to make provision for assistance from experts.
- Targets which are not too remote (3 months, 6 months, 1 year) provide incentives.
- A good programme should highlight the attractiveness of jobs to both women and men (quality of recruitment advertising) and the aspects of company culture which are beneficial and favourable to women and men (training, flexibility between work and private responsibilities, etc.).
- It is important that a company's PA plan can be fully achieved in practice and serve thereafter as a source of reference.
- At the time of launching a PA scheme, it is helpful to envisage, within the framework of long-term objectives, a series of short-term actions, each followed by an evaluation. This should lead, in consequence, to improvements in subsequent action.

Making a success of the initial measures requires a great deal of perseverance, numerous negotiations (sometimes resulting in compromises) and regular progress reports.

#### 2.2.4. Follow-up and evaluation

- Continuous, effective monitoring is essential.
- It is necessary to find methods of maintaining the momentum and sustaining the rhythm of the work programme; for example, through seminars, debates, press conferences or releases, company newsletters.
- It may be necessary to tackle scepticism on the part of management, which may be inclined not to continue the experiment once it is over.
- For the purposes of development and mutual encouragement, it is essential to develop exchanges of information and comparisons between companies at national and international level. In the case of some companies, an international context guarantees that plans will be continued.
- It is also necessary to devise a structure to examine and assess PA plans, because it is important to reward those who achieve the plan's objectives and to penalise the others.
- Finally, it is important to publicise successes and disseminate information to as wide a public as possible.

### 3. GENERAL CONCLUSION

The main motivating factor is presentation of PA schemes as instruments which enable better management of human resources.

In general, companies are all the more inclined to implement a PA programme if it enables them to find solutions or to tackle internal problems more effectively (technological change, skills shortages, etc.). However, limiting the programme to specific company problems means that PA schemes will be discontinued as soon as these problems have been solved. It is better to incorporate the solution of the company's problems into a broader strategy, namely, more efficient management of human resources, which guarantees the long-term continuation of a PA programme. PA schemes should not be used simply in response to specific company problems, but should result in a thorough change in attitudes towards the organization of work.

Similarly, a pragmatic approach to PA schemes makes it possible to motivate a company prepared to initiate a PA programme under external pressure (political and/or social).

Finally, presenting PA programmes as a strategy for improving the use of human resources makes it possible to counter obstacles to their implementation.

This obviously has a direct influence on the EC's Positive Action Guide. The section "Why launch a PA?" should no longer focus exclusively on prejudices against women, but must stress the role that PA schemes can play in optimizing the management of human resources.

ANNEX I

List of motivating factors

Better management of human resources

Willingness and commitment on the part of management

Economic and technological demands :

- \* Lack of skilled applicants and labour
- \* Fear of losing key female staff
- \* Maintaining a skilled staff

Good external image

- \* Advantage in recruitment

Existence of accompanying legal and practical measures (experts, incentive subsidies, etc.)

ANNEX 2

List of obstacles

Company size and lack of a human resources strategy

Fear of additional costs

Fear of organizational change

Lack of support and accompanying measures

Generally speaking, lack of change in attitudes and stereotypes vis-a-vis female employment

ANNEX 3

The following is a recapitulative list of the dates on which Member States joined the Positive Action in Enterprises Network and the names of the various consultants.

- countries which joined in 1986:
  - \* Germany - Consultant : Mrs. M. Weigmann
  - \* Belgium - Consultant : Mrs. M. Chalude
  - \* France - Consultant : Mrs. J. Laufer
  - \* Ireland - Consultant : Mrs. P. Brand
  - \* Netherlands - Consultant : Mrs. A. de Jong
  
- countries which joined in 1986 but which changed consultant during the programme:
  - \* United Kingdom - Consultant : Mr. R. Chater from 1988
  
- countries which joined after 1986 :
  - \* Denmark, 1988 - Consultant : Mrs. L. Valbjorn
  - \* Italy, 1988 - Consultants : Mrs. F. Olivares, followed by Mrs. M. Chiesi
  - \* Greece, 1989 - Consultant : Mrs. V. Stockdale
  - \* Spain - Consultant : Mr. L. Jimenez from 1991
  - \* Portugal - Consultants : Mrs. I. Garcia, Mr. de Vasconcelos Porto

The Grand-Duchy of Luxembourg is not represented by a national expert within the Positive Action Network.



ANNEX 4

B : Belgium  
D : Germany  
DK : Denmark  
F : France  
G : Greece  
I : Italy  
IRL : Ireland  
NL : Netherlands  
P : Portugal  
SP : Spain  
UK : United Kingdom