

## 3. Tool-kit

### Preliminary tools

- implementation plan
- facilities
- resources
- liability mechanisms
- training

### Implementation Methods and Tools

- gender analysis
- gender audits
- gender awareness
- gender budget
- gender assessment
- gender impact assessment
- gender indicators
- gender monitoring
- gender planning
- gender procurement
- gender statistics (with gender-disaggregated data)
- consultation of the parties
- institutional transformations

### Results

- better design of gender policies
- a better functioning of the institutions
- more effective processes
- equal representation of men and women
- gender perspectives in policy content

## 3.1 GENDER EQUALITY PLAN (GEP)

In order to be eligible for EU research and innovation funds from 2022, organisations will have to demonstrate that they have drawn up a Gender Equality Plan.

A 'Guide' for a plan to access Horizon [Europe](#) 2021-2027 funds was published on 27/9/2021 [Horizon Europe Guidance on Gender Equality Plans \(GEPs\)](#), which is illustrative and useful for training purposes.

*Some useful pointers for designing a Gender Equality Plan*

Data and metrics:

Relevant data on gender equality for all organisations may include:

- Number of staff by sex/gender at all levels, by discipline, function (including administrative/support staff) and contractual relationship with the organisation;
- Average number of years required for women and men to make career advancement (by grade and by discipline);
- Wage gaps by sex/gender and occupation;

- Number of women and men in decision-making positions (e.g. top management, boards, committees, recruitment);
- Number of female and male applicants applying for separate job positions;
- Number of women and men who have left the organisation in past years, specifying the number of years spent in the organisation;
- Number of employees by sex/gender applying for/taking parental leave, how long and percentage returning to work following leave;
- Number of leave days requested/taken by women and men and analysis of the reasons for the request/absence;
- Number of hours/credits of training attended by women and men;

Specific data on gender equality relevant to academic institutions:

- Number of male and female students at all levels and for all disciplines and academic and employment outcomes;
- Share of women and men among employed male and female researchers;
- Proportion of women and men among applications for research positions;
- Percentage of women and men selected and success rate, also by scientific-academic field and position relative to contract status;
- Proportion of women and men on recruitment/promotion committees;
- Share of women and men heading recruitment or promotion committees;
- Share of women and men in decision-making bodies
- The average size of grants for research projects conducted by men and women;
- Gender mainstreaming in research funding schemes;
- Gender mainstreaming in submitted and funded projects;
- Amounts allocated to research projects mainly dedicated to gender issues.

(Source: adapted from [Science Europe's Practical Guide](#) to Improving Gender Equality in Research Organisations and the GEAR Tool)

### 3.1.1 Detailed guidance on the constituent elements of the Gender Equality Plan recommended by the EU

#### *Work-life balance and organisational culture*

A key component of transforming an organisation's culture to promote gender equality is work-life balance. Work-life balance is important for both women and men and involves ensuring that all staff are adequately supported to advance their careers by balancing private commitments due to personal responsibilities, including caring responsibilities. Work-life balance policies and practices that can be reviewed and addressed in a Gender Equality Plan include:

- Parental leave policies, including ensuring that fixed-term contracts can be extended or grant agreements can be extended;
- Organisation of flexible working time, including the impact of departmental processes, procedures and practices on staff with caring responsibilities or part-time workers and remote working;
- Support for caring responsibilities, including childcare and care of other dependants (e.g. persons with disabilities, elderly relatives);
- Workload management, including how different tasks are allocated and distributed, such as teaching and administrative workloads versus research in universities;
- Re-integration of staff after career breaks, including active mentoring and support;
- Advice and support on work-life balance.

A respectful, open and welcoming organisational culture is sensitive to a variety of gender identities and does not consider women and men as homogeneous groups. Actions in relation to organisational culture may include measures to ensure that all staff feel valued and welcomed in the workplace. Relevant policies may include harassment and dignity at work policies that set expectations for staff and management behaviour. Other steps may include actively using and encouraging inclusive language within the organisation in relation to gender, but also other forms of identity and diversity. Informal aspects of organisational culture may also be considered, including an analysis of social practices in order to transform them to be welcoming and inclusive for all staff.

### *Gender balance in leadership and decision-making*

Improving gender balance in leadership and decision-making is a key objective for Gender Equality Plans. Aspects that a GEP may consider include:

- How well women are represented in decision-making processes at the top of the organisation, in academic schools and in administrative functions;
- What types of barriers need to be broken down to ensure that women are represented in decision-making and *leadership* positions, including structural, institutional and individual barriers;
- What targets could be set to promote gender balance in leadership and decision-making roles within the organisation;
- What steps can be taken and by whom to achieve these goals.

Increasing the number and share of women in *leadership* and decision-making positions is a process that touches on all aspects of the Gender Equality Plan, from the collection and analysis of sex/gender-disaggregated data to the identification of issues, gender-sensitive training, organisational practices and the promotion of work-life balance.

### *Ensuring gender balance through the introduction of gender quotas*

The EIGE defines gender quotas as a 'positive measuring instrument that establishes a certain proportion (percentage) or number of posts to be allocated to women and/or men, generally according to certain rules or criteria'.

### *Gender equality in recruitment and career progression*

Women face systemic discrimination and structural barriers along their career paths in research and innovation. Recruitment, selection and career advancement measures aim to ensure that women and men have equal opportunities to develop and advance their careers. Critically reviewing existing selection processes and procedures at all stages and correcting any biases are important steps to ensure gender equality in academic and research careers in higher education organisations. Public bodies should also consider the quality of their recruitment and career progression practices, including how their funding policies and programmes can promote gender equality in research careers. In addressing gender equality in recruitment and career progression, a Gender Equality Plan could explore and outline:

- what targets should be set in terms of recruitment of women and progression into senior roles;
- What inclusive and proactive measures can be implemented to achieve these goals.

### *Gender mainstreaming in research and teaching content*

The Gender Equality Plan should consider how gender will be incorporated into the content of the organisation's research or education activities and outputs. It may outline the organisation's

commitment to incorporating gender equality into its research and innovation priorities, the processes for ensuring that sex and gender analysis is taken into account in the design and outcomes of research and education, and the support and capacity provided to researchers to develop methodologies that incorporate gender.

Gender mainstreaming concerns the incorporation of sex and/or gender analysis throughout the entire research and innovation cycle. This includes the setting of research priorities through the definition of concepts, the formulation of research questions, the development of methodologies, the collection and analysis of sex/gender disaggregated data, the evaluation and communication of results and their transfer to markets in products and innovations. Gender mainstreaming is relevant in many fields of research and innovation.

## 3.2 GENDER IMPACT ASSESSMENT (GIA)

Among the actions that Europe proposes in the field of *gender mainstreaming*, the gender assessment of projects, the *Gender Impact Assessment (GIA)* [defined at the EU](#) as follows, is of particular relevance:

"Gender impact assessment is the process of comparing and evaluating, according to gender-relevant criteria, the current situation and future trends with the expected developments resulting from the introduction of the proposed measure".

Gender impact assessment (GIA) is an ex-ante analysis of a law, policy or programme that makes it possible to estimate in advance the likelihood of a given decision to have positive, negative or neutral consequences for the status of equality between women and men. The central question of GIA is: does a law, policy or programme reduce, maintain or increase gender inequality between women and men?

The evaluation involves a two-pronged approach: the current gender position in relation to the policy under consideration and the expected impacts on women and men once the policy is implemented. It is important that the evaluation is structured, i.e. that it is systematic, analytical and documented. The ultimate aim of GIA is to improve policy design and planning in order to prevent a negative impact on gender equality and indeed strengthen it through transformative laws and policies. A primary objective is to adapt policy to ensure that any discriminatory effects are removed or mitigated. In these terms, the GIA can be used as a tool to define gender equality goals and formulate policy to proactively promote them.

The main steps for conducting a gender impact assessment are:

- Step 1: Definition of the political purpose, to produce a precise definition of the objective of the planned policy or legislative intervention;
- Step 2: Check for the presence of a gender perspective to determine its relevance in terms of equality. This involves analysing whether or not it is likely to have an impact on gender equality;
- Step 3: Gender-sensitive analysis, which has a dual focus. On the one hand, it aims to understand the current situation of the groups affected by public intervention and how this situation would evolve without public intervention. On the other hand, it includes, as far as possible in measurable terms, in a prospective dimension how the planned intervention is expected to change the existing situation;
- Step 4: Weigh gender impact, determine how the policy or legislative measure will contribute to gender equality, and assess the expected impact in gender reporting;

- Step 5: Findings and recommendations for policy/legislative options. In this last step, the results of the analysis are presented and the impacts (positive or negative) of the policy/legislative initiative are highlighted. Recommendations are presented on how to eliminate negative impacts and how to enhance positive ones.

### 3.3 GENDER STATISTICS

Gender statistics aim to "reflect differences and inequalities in the situation of women and men in all spheres of life". By providing evidence of gender equality and gender gaps in key areas, they help make inequalities visible, which can in turn inform decision-making to address identified gender gaps. They help identify data relevant to women's and men's lives and key areas of policy-making.

The United Nations Statistics Division Manual defines gender statistics as including the following characteristics:

- data are collected and presented disaggregated by gender as a primary and overall classification;
- the data reflect gender issues;
- data are based on concepts and definitions that adequately reflect the diversity of women and men and capture all aspects of their lives;
- data collection methods take into account stereotypes and social and cultural factors that may induce gender bias.

It is important to distinguish between data disaggregated by sex/gender and gender statistics. Disaggregated data refer to the collection of data and their breakdown separately for women and men. Gender statistics go further, as they take into account wider gender inequalities and gender biases in data collection methods and tools. Moreover, gender statistics have the potential to reflect different groups of women and men, taking into account that 'gender intersects with age, education, family composition, parenting, birth and disability'. This means that gender statistics can reflect a deeper understanding of women's situations and needs and thus support the analysis of intersecting inequalities.

#### *Overview of gender indicators*

Gender indicators are the measures on which data are collected. The EU has designed relevant gender indicators to show gender gaps in access to resources and opportunities in areas such as education, employment, decision-making and gender-based violence. The indicators can be used to show relative positions or positive or negative changes. They are also important to show progress over time, for example, changes in women's participation in the labour market.

Quantitative data collection methods produce quantifiable results. In other words, they focus on issues that can be counted, such as the percentages of women and men in the labour market, male and female wage rates or school enrolment rates for girls and boys. Quantitative data can show the extent of changes in gender equality over time, e.g. the percentage of women married before the age of 15 or the gender pay gap over time.

Qualitative methods capture people's experiences, opinions, attitudes and feelings, e.g. women's experiences of the constraints or advantages of working in the informal sector, or men's and women's views on the causes and consequences of the under-representation of women in leading positions in the economy or politics. Participatory methods such as focus groups and social mapping tools are often used to collect data for qualitative indicators. Qualitative data can also be collected through in-depth surveys measuring perceptions and opinions.

Gender statistics and indicators have the potential to help reduce gender inequalities by providing an evidence base that makes gender inequalities visible. Such indicators ensure that the situation and contribution of women and men to society are measured correctly and evaluated fairly. They also make gender aspects visible in areas where they were previously considered irrelevant.

Gender statistics and indicators are important because:

- help provide evidence of progress towards gender equality, help close persistent gender gaps and correct gender biases. For example, policies to alleviate poverty have traditionally used the concept of household income to measure the distribution of resources. This is based on a gender-based assumption that income is equally distributed within the household and among its members, ignoring gender differences in access to income and resources and the impact of gender roles and relationships within the household. In this case, the collection of gender-relevant data, both at the individual and household level, can help reveal such differences;
- help demonstrate that gender inequality is a concern for the whole of society and must be taken seriously by all actors in the public arena;
- provide evidence for the development of policies, programmes, projects and legislation that address the needs of women and men as beneficiaries of an intervention in a specific context;
- help support learning processes for policy-makers and stakeholders by making gender inequalities visible;
- contribute to raising the awareness of citizens and *policy makers* on gender inequalities, encouraging them to take action;
- help provide information on the potential impacts of policies and interventions on women and men;
- contribute to preventing the adoption of policies that perpetuate gender bias and inequalities and/or avoid the risk of not achieving the objectives of the respective intervention;

## 3.4 GENDER BUDGETING

Gender budgeting is a useful planning tool. It finds a solid basis in the EU's commitment to gender mainstreaming expressed in the Treaty on the Functioning of the European Union. The European Parliament and the Council of the European Union have repeatedly called on member states to develop and implement gender budgeting.

At EU level, the European Parliament is ultimately responsible for the budget and the European Commission's Budget Directorate General is responsible for its implementation. The parliaments and public administrations of the member states are responsible for national and sub-national budget cycles.

In order to implement gender budgeting effectively, some common elements should be in place:

- analysis of budgets and policies from a gender perspective;
- link gender budgeting to overall gender equality objectives;
- restructure budgets and change policies;
- integrate gender perspectives throughout the budget cycle;
- monitoring and evaluation of results;
- transparency of the budget process;
- participation in the budget process.

According to the [Euro Guide](https://eige.europa.eu/publications-resources/publications/gender-mainstreaming-gender-analysis)  
<https://eige.europa.eu/publications-resources/publications/gender-mainstreaming-gender-analysis>



[?language\\_content\\_entity=en](#) ea, resources dedicated to a Gender Equality Plan may include Gender Budgeting. Gender budgeting is a management strategy that aims to integrate a gender perspective into the financial processes and procedures of institutions. It is a tool to promote gender equality that can create new approaches to policies and decision-making processes related to resource collection and allocation and to the identification of gender disparities in resources and workload. It not only addresses the gender gap in the distribution of salaries and other compensation among staff, but recognises that financial decisions and procedures are policy processes that produce results.

Gender budgeting originates from the Platform for Action of the Fourth World Conference on Women held in Beijing in 1995 and its aim is to be a necessary tool for accounting for and evaluating gender mainstreaming in public policies. According to the definition widely used by the Council of Europe, gender budgeting "is therefore an integral part of a good governance strategy".

The experiences gained at international level, within different social, cultural and political contexts, highlight among the fundamental objectives of gender budgeting those of

- Increase awareness of the impact public policies can have on gender inequalities;
- Ensuring greater effectiveness of interventions through a clear definition of gender objectives to be taken into account also in the identification of implementation modalities;
- Promote greater transparency in public administration by activating mechanisms to highlight potentially discriminatory practices.

At the European level, reiterating what was already indicated in the European Parliament Resolution of 3 July 2003, the European Parliament Resolution of 15 January 2019 on gender equality and taxation policies in the European Union, calls on the Commission and the Member States to implement gender budgeting in such a way as to explicitly identify the share of public funds allocated to women and to ensure that all policies for resource mobilisation and expenditure allocation promote gender equality. With the subsequent European Parliament Resolution of 21 January 2021 on the EU strategy for gender equality, it is once again highlighted that gender budgeting and gender impact assessment are essential tools for achieving gender equality in all policy areas.

#### *How a gender balance sheet is constructed*

Gender budgeting involves a review or "reclassification" of budget expenditure in the light of an assessment of its different impact on men and women. Gender budgeting therefore does not involve identifying interventions and resources specifically targeted at women, but analyses and classifies all budget expenditure by distinguishing between the following categories:

- "aimed at reducing gender inequalities", relating to measures directly leading to or aimed at reducing gender inequalities or promoting equal opportunities;
- "sensitive", relating to measures that have or could have an impact, even indirectly, on gender inequalities;
- "to be further investigated" related to measures that, due to some of their characteristics (nature of expenditure and/or potential beneficiaries), could be classified as sensitive after further investigation in order to verify possible direct or indirect impacts on gender differences;
- "neutral", relating to measures that have no direct or indirect impact on gender (code 0).

#### *Investments to reduce gender inequalities*

These are expenditures that are directly related to or aimed at reducing gender inequalities or aimed at establishing equal conditions or treatment. They can be implemented through positive action or guarantees and protection against direct and indirect forms of discrimination.

For example, the following types of expenditure are aimed at reducing gender inequalities:

- resources provided exclusively to women to reduce a known gender gap (e.g. for female entrepreneurship, maternity, shelters for women victims of violence, etc.);
- resources provided exclusively to men to reduce a known gender gap (e.g. projects for students' Italian language skills intended only for male students, serious traffic accident prevention measures promoted for men, etc.);
- incentives aimed at female employment, reconciling work-life needs, and promoting equal opportunities;

In addition, the need to finalise the adoption of gender budgeting by also taking into account the development of the fair and sustainable welfare (BES) indicators that must be included in the budget cycle in order to integrate the strictly economic dimensions in the economic-financial planning phase of public policies.

Gender budgeting provides useful information on whether and to what extent commitments towards achieving substantive gender equality are translated into budgetary commitments, as well as on whether the adopted interventions are producing the desired results. In addition to highlighting the effort in terms of resources aimed at affecting gender gaps, periodic budget reporting from a gender perspective aims to encourage greater consideration of the characteristics of the target population in the design of interventions and their implementation, even when they are not female. The relevance of analysing the budget from a gender perspective has become even more evident in the wake of the international health crisis which, at the beginning of the 2020s, led to serious economic and social consequences for the population, also highlighting the widening of existing gender gaps.

The path towards incorporating the state's gender budget into a strategic framework of objectives can also be useful in order to provoke an improvement in the EIGE's Gender Equality Index score, counting on the improvement of the context in the 5 priority areas - work; income; skills; time; power - for each of which indicators and related end-of-period targets define the desired effects. In this respect, the gender budget offers a wide choice of monitoring indicators.

The goal of incorporating gender budgeting within a strategic framework of objectives to reduce gender gaps, since it is a provisional budget, will be able to act on resource allocation choices, laying the foundations for a pathway to include gender *mainstreaming* in public policies. To this end, a broad battery of indicators must be used to highlight the different characteristics and behaviour of men and women with respect to multiple socio-economic phenomena. These indicators are articulated according to areas of intervention, such as:

- the labour market;
- work-life balance;
- labour protection, welfare and assistance;
- education and interventions against gender stereotypes;
- participation in economic, decision-making, political and administrative processes;
- combating gender-based violence;
- health, lifestyle and safety.

The selected indicators are updated annually and available from international sources such as Eurostat, the European Institute for Gender Equality (EIGE) and the Organisation for Economic Cooperation and Development (OECD).

Gender analysis of sensitive expenditure or, more generally, gender *mainstreaming*, makes it possible to identify ways of implementing interventions that produce positive effects on reducing inequalities,



without necessarily creating additional burdens on the public budget. The thematic sections list useful guidelines for public administrations to improve their training in each of the identified areas.

### 3.5 GENDER CERTIFICATION

The measure aims to ensure greater participation of women in the labour market and to reduce the gender pay gap through the creation of a national/regional gender equality certification system. This certification can be granted to all companies (public and private) that demonstrate the effectiveness and efficiency of their gender equality policies. The granting of gender equality certification to companies will be carried out by conformity assessment bodies accredited in this field according to national or regional regulations. The criteria to be considered for certification will be increased opportunities for women within the company, equal pay for equal work, the presence of gender diversity policies and maternity protection.

EU Regulation No. 1025/2012 has inspired several European countries to adopt the practice of 'gender certification' of companies and institutions in their regulations, adapting it to their different realities. The reference practice defines "the guidelines on the management system for gender equality" that foresees the structuring and adoption of a set of performance indicators (KPIs - Key Performance Indicators) concerning gender equality policies in organisations. The Reference Practice for Gender Equality in Organisations provides for the measurement, reporting and evaluation of gender-related data in organisations with the aim of bridging the gaps that currently exist, as well as incorporating the new gender equality paradigm into the DNA of organisations and producing sustainable and lasting change over time. This certification, approved by public administrations (municipalities, companies, etc.), guarantees state aid and/or public funding, including European funding, through a higher scoring system in tenders for the acquisition of services and supplies and greater attractiveness and retention of workers.

#### *Indicators for gender certification*

In order to ensure a holistic measurement of the maturity level of individual organisations, these guidelines identify six areas of indicators pertaining to the different variables that can distinguish the inclusive and gender-equal organisation:

1. Culture and strategy;
2. *Governance*;
3. Human resources selection processes;
4. Opportunities for growth and inclusion of women in business;
5. Gender pay equity;
6. Parental protection and work-life balance.

Each Area is distinguished by a percentage weight (100 the total weight of the different Areas) that contributes to the measurement of the organisation's level and against which constant progress over time is measured. Specific KPIs (Key Performance Indicators) have been identified for each Assessment Area, through which the organisation's degree of maturity can be measured, subject to annual monitoring and verification every two years, in order to provide evidence of the improvement achieved thanks to the variety of interventions implemented or the *remediation plan* activated, if any. In order to ensure appropriate consistency with the different organisational realities that represent the Country System, understood as the nation's entire economic-productive apparatus, the indicators pertaining to the six aforementioned Areas are applicable according to a principle of

proportionality that defines a proportional and gradual application based on the dimensional profile of the organisation considered as a synthesis of its different organisational articulation and complexity. In the face of classification in one of the four bands, the set of indicators is defined, considering the diversity target consistent with the size of the organisation.

#### *Organisations' classification bands/clusters*

Simplifications are envisaged for organisations belonging to band 1 (micro-organisation no. of employees 1 to 9) and band 2 (small organisation no. of employees 10 to 49), while for organisations belonging to band 3 (medium organisation no. of employees 50 to 249) and band 4 (large organisation no. of employees 250 and more) all indicators are applied.

The indicators are quantitative and qualitative in nature. Indicators of a qualitative nature are measured in terms of presence or non-presence, while indicators of a quantitative nature are measured in terms of delta % with respect to an internal company value or to the average national reference value or of the type of economic activity. Each individual indicator is associated with a score, the attainment or nonattainment of which is weighted by the weight of the area to which it belongs. A minimum overall summary *score of 60 percent* must be achieved to determine the organisation's access to certification. In this way, the attribution of a conformity audit based on the final *score* allows *stakeholders* to recognise the validity and effectiveness of the processes implemented internally, with positive repercussions in terms of brand reputation and economy.

The certification is issued at the time the indicators are detected, if the requirements for achieving the minimum score established through the KPIs are already in place. Every two years, this certification is re-evaluated and renewed if mitigation and improvement plans have been implemented on the *gaps* detected. The calculation model is to be considered dynamic, i.e. the algorithm is updated every year with a new average based on the data received for the previous year for each category.

#### *Indicator areas*

a) **Culture and strategy:** this is an area aimed at measuring whether the organisation's principles and objectives of inclusion, gender equality and attention to *gender diversity* are consistent with its vision, goals and values. Its weight in the overall assessment is 15%.

There are seven indicators relevant to this area:

1. formalisation of a strategic plan;
2. presence of internal employee consultation procedures;
3. internal communication plan and gender awareness activities;
4. presence of women on conference *panels*;
5. implementation of training interventions;
6. interventions to analyse employees' perceptions of equality;
7. actions to promote outward-looking equality.

b) **Governance:** this is an area designed to measure the degree of maturity of the organisation's *governance* model aimed at defining adequate organisational safeguards and the presence of the minority gender in the organisation's governing and control bodies, as well as the presence of processes aimed at identifying and remedying any event of non-inclusion. The weight of the area with respect to the overall assessment is 15%.

There are five indicators relevant to this area:

1. definition in the *governance of a dedicated praesidium* (unit or function);

2. presence of processes to identify and manage any form of non-inclusiveness;
3. presence of an organisation's budget;
4. definition of objectives, such as the presence of the least represented sex in the supervisory body;
5. presence of women on *boards*;

c) **Human Resources Processes:** this is an area aimed at measuring the degree of maturity of the main processes in the field of human resources, relating to the life cycle of a resource in the organisation and which should be based on principles of inclusion and respect for diversity. The weight of the area with respect to the overall assessment is 10%.

There are six indicators relevant to this area:

1. definition of human resources management and development processes in favour of inclusion and gender equality;
2. presence of mechanisms to analyse *turnover by gender*;
3. presence of policies to ensure fair and equal participation in internal career pathways;
4. presence of internal mobility policies and succession to managerial positions;
5. presence of job protection mechanisms and guarantee of the same salary level in the post-maternity period;
6. presence of personal protection representatives in the workplace with regard to harassment and bullying.

d) **Growth of opportunities and inclusion of women in the company:** this is an area aimed at measuring the degree of maturity of organisations in relation to gender-neutral access to internal career and growth paths and the related acceleration. The weight of the area in relation to the overall assessment is 20% There are seven indicators pertaining to this area:

1. percentage of women in the organisation;
2. percentages compared to the industry *benchmark*;
3. percentage with executive status;
4. responsible for one or more organisational units;
5. Percentage of women in charge of one or more organisational units out of the total target population;
6. Percentage of women in the front line of reporting at the top;
7. Percentage of women in the organisation with delegated authority over an expenditure/investment budget.

e) **Gender pay equity:** this is an area aimed at measuring the degree of maturity of organisations in relation to the pay differential in *total reward* logic, thus also including non-monetary compensation such as welfare and well-being systems. The weight of the area with respect to the overall assessment is 20%.

There are three indicators relevant to this area:

1. percentage of pay difference by gender in the same level of and at the same skill level;
2. percentage of promotion of women on an annual basis;
3. percentage of women with variable remuneration.

f) **Parental protection and work-life balance:** this is an area aimed at measuring the degree of maturity of organisations in relation to the presence of policies to support parenting in its various forms and the adoption of procedures that facilitate and support the presence of women with sons and daughters of pre-school age. The area's weight in the overall assessment is 20%.

There are five indicators relevant to this area:

1. presence of dedicated services for post maternity/paternity return;
2. presence of policies, beyond the relevant National Labour Contract, dedicated to maternity/paternity protection and services to facilitate the reconciliation of personal and working life times;
3. presence of policies to maintain benefits and initiatives that enhance the experience of parenthood as a moment of acquiring new skills for the benefit of the individual and the organisation;
4. Ratio of the number of actual male beneficiaries to the total number of potential beneficiaries of paternity leave in the first 12 years of the child's life.
5. ratio of the average number of days taken of compulsory paternity leave to the total number of days taken of optional statutory paternity leave.

### *Public procurement and gender equality*

Institutions today can make use of tendering procedures based on European regulations that introduce criteria to reward certified companies that promote gender equality, in line with policy indications. At the European level, several institutional experiences on gender-responsive *public procurement* are already underway and in many countries the system of gender certification for companies wishing to participate in tenders is widespread. It is a good practice that contributes to the promotion of egalitarian and anti-discriminatory principles within labour organisations, such as the balance of representation in *governance*, the provision of corporate social responsibility in anti-discriminatory matters, and the adoption of work-life balance solutions.

### *Gender equality policies*

Public and private organisations and institutions that adopt a *global* gender equality policy - which aims to enhance and protect diversity and equal opportunities in the workplace - must define an action plan for its implementation by setting up a management model that guarantees over time the maintenance of the requirements defined and implemented, measuring the progress of the results through the preparation of specific "Key Performance Indicators" that they report in the management system documents, through which they maintain and verify the planned actions. The overall policy must contain references to related policies concerning at least personnel and career management and communication (including marketing and advertising activities) that must transparently state the organisation's will to pursue gender equality, value diversity and support women's *empowerment*. The general policy and those related to gender equality can be part of a single system document and must be reconfirmed or updated at the time of the periodic review, as part of the verification and improvement of the management system.

KPIs contain an important part of the information needed to determine and explain how an organisation (company, institution, public administration) progresses towards its goals.

The company's gender equality policy must be: a) defined by management, in coordination with the steering committee; b) communicated and disseminated within the organisation and to its stakeholders; c) the subject of training and awareness-raising to company management; d) periodically reviewed or confirmed in the review phase on the basis of events, changes and the results of monitoring and audits; e) coordinated by a responsible figure, designated by management and possessing organisational and gender expertise. The equality policy must be made available on the organisation's website and must contain the guiding principles and guidelines that define the organisation's commitment to gender equality, diversity and women's *empowerment* issues. Management assigns adequate resources (budget), responsibility and authority for pursuing, achieving and maintaining the established equality objectives. Management, depending on company size, shall appoint a steering committee for the effective adoption and continuous and effective

implementation of the gender equality policy (general and related). The steering committee, depending on the size of the organisation, must be composed of at least the managing director, or a person delegated by the ownership, and the personnel director, or other equivalent figure.

### *The fundamental pillars of gender certification*

The fundamental pillars of gender certification are numerous:

#### **1. Planning**

The steering committee must draw up the strategic plan that defines for each theme identified by the policy (general and related) simple, measurable, achievable, realistic, time-planned objectives and assigned responsibilities for implementation. The strategic plan for implementation must consist of the following steps, typical of planning processes: a) identification of business processes related to the identified gender equality issues; b) identification of strengths and weaknesses with respect to the issues; c) definition of objectives; d) definition of actions decided upon to close the gaps; e) definition, frequency and responsibility for monitoring the defined KPIs. The strategic plan must be shared by management and kept up-to-date over time. Depending on the size of the organisation, the strategic plan may be more or less complex, although the frequency of monitoring the applicable KPIs must be identified.

#### **2. Implementation of Strategic Plan Actions and Monitoring**

The organisation must implement the actions and monitoring defined in the plan, in particular by providing: a) written instructions on how to implement and monitor, where applicable; b) general and specific training, at all levels, including training against gender-related prejudices and stereotypes. Training courses must be provided on the ethical principles, issues and operating methods adopted by the organisation to ensure the effectiveness of the gender equality policy. These courses shall be addressed to all personnel, as appropriate; in particular, for persons in managerial positions, they shall cover the principles, issues and objectives that fall under their specific responsibilities. The main topics covered in the strategic plan and their minimum requirements are given in the text.

#### **3. Selection and recruitment**

In relation to its policies and resources, the organisation must: a) set up selection and recruitment procedures that define rules to prevent gender inequality, in particular suitable to counteract *bias*, e.g. approaching candidate profiles fairly on the basis of gender; b) set up job descriptions to be gender-neutral and the recruitment process to be aimed at both men and women; c) not allow requests relating to marriage, pregnancy or caring responsibilities to be made during interviews.

#### **4. Career management**

In relation to its policies and resources, the organisation shall: a) define processes aimed at ensuring non-discrimination and equal opportunities in professional development and promotions, based exclusively on skills and professional levels; b) aim for gender balance in corporate leadership positions, in correlation with the specific sector and specific tasks; c) address career opportunities and professional development programmes to all staff; d) make available data on the state of recruitment, the situation by gender, the male situation for each of the professions, training, professional promotion, levels, changes in category or qualification, other mobility phenomena, the intervention of the Wage Guarantee Fund, redundancies, early retirements and retirements, and actual remuneration; e) create a working environment that fosters diversity and protects the psycho-physical wellbeing of employees; f) plan monitoring activities capable of detecting the data referred to in point d); g) provide training opportunities specifically aimed at developing and



improving professional leadership skills to address career obstacles encountered by the less represented gender.

### 5. Wage equity

In relation to its policies and resources, the organisation should: a) provide itself with an individual company job description that complements and details the generic one of the National Collective Labour Agreement, for employees to report any pay inequalities; b) set up a control mechanism to avoid practices that do not correspond to the declared non-discriminatory policies, including salaries, benefits, bonuses, welfare programmes; c) periodically inform employees of the remuneration policies adopted in the company, also with reference to benefits, bonuses, welfare programmes; d) where existing, the welfare programme must consider the needs of people of all genders and ages.

### 6. Parenting

In relation to its own policies and resources, the organisation should: a) set up specific maternity or paternity leave programmes (e.g. training programmes for reintegration) and a way of informing about any important changes that occur in the workplace during the leave; b) set up a plan for managing the different stages of maternity (before, during and after); c) implement information mechanisms aimed at encouraging the request for paternity leave d) pianificare iniziative specifiche per supportare i/le dipendenti al loro rientro da un congedo genitoriale (formazione, supporto), inclusi eventuali piani di engagement da proporre su base volontaria alle donne in congedo di maternità; e) includere nell'ambito del programma di welfare aziendale, ove esistente, iniziative specifiche per supportare i/le dipendenti nelle loro attività genitoriali e di caregiver; f) offrire servizi specifici quali asili nido aziendale, dopo scuola per i bambini e attività ludiche durante le vacanze scolastiche, voucher per attività sportive dei figli, ecc.

### 7. Work-Life Balance

In relation to its policies and resources, the organisation should: a) adopt measures to ensure work-life balance for all employees; b) establish/promote specific agreements to allow part-time work for those who request it; c) offer flexibility in working hours, establishing and communicating simple and accessible rules and procedures to use them; d) carry out a periodic review of the flexibility needs of employees e) offer the possibility of teleworking or other forms of flexible work, and flexible working hours; f) ensure that work meetings are held at times compatible with the reconciliation of family and personal life times; g) ensure that part-time workers and workers with flexible, discontinuous, etc. work contracts can also attend work meetings.

### 8. Prevention of all forms of physical, verbal, digital abuse and/or harassment in the workplace

In relation to its policies and resources, the organisation must fully implement the provisions of the law and collective agreements, signed by the business organisations to which it adheres, concerning the fight against harassment in the workplace. In particular, the organisation shall a) identify the risk of any form of abuse and/or harassment in the light of Health and Safety in the Workplace; b) prepare a Plan for the prevention and management of harassment in the workplace; c) provide specific training at all levels, with defined frequency, on 'zero tolerance' with respect to any form of violence towards/against employees, including sexual harassment in any form; d) provide a methodology for anonymous reporting of this type of occurrence to protect employees who report e) planning and implementing surveys among employees, investigating whether they have personally experienced attitudes of this kind, which have caused discomfort or upset, either internally or in the performance of their work externally (sexist attitudes, behaviour or situations of disrespect); f) assessing the work environment also from this point of view; g) providing for a risk assessment and analysis of reported adverse events; m) ensuring constant attention to the language used, raising awareness of communication that is as polite and neutral as possible.



### *Management System*

The main aspects that an organisation's management system must include to ensure that the requirements defined in these Guidelines are maintained over time are:

#### **1. System Documentation**

In relation to its policies and resources, the organisation must: a) manage system documentation to ensure that the versions in force are known to users, clearly identified, prepared, approved and amended by those in authority; b) identify specific regulatory requirements with respect to gender equality in employment, list them by keeping them up-to-date and communicate them internally to the functions responsible for assessing their impact, taking them on board and implementing them; c) collect and analyse gender-disaggregated data.

#### **2. Monitoring of indicators**

In relation to its policies and resources, the organisation must: a) collect and analyse general and specific KPIs related to the implementation of the strategic plan; b) evaluate the performance of the KPIs with appropriate frequency, as set out in the strategic plan, and implement corrective actions in the face of deviations. The indicators must be consistent with the type of organisation - its size, reference sector and context - and the stakeholders.

#### **3. Internal and external communication**

In relation to its policies and resources, the organisation must: a) prepare and disseminate to interested parties (stakeholders) a communication plan relating to its commitment to gender equality issues; b) base its internal and external communication (marketing, advertising) on responsibility (avoiding gender stereotyping in advertising actions, ensuring a periodic review of marketing materials and strategies, committing to disseminating a positive image of women and girls, using language that respects gender differences) c) identifying stakeholders with whom to establish communication on gender equality issues, particularly in the workplace; d) ensuring that communication is consistent with the principles of the policy and with the objectives established and implemented through the strategic plan; e) aligning internal and external communication with the values and culture of respect for gender difference;

#### **4. Internal Audits**

In relation to its policies and resources, the organisation must plan, implement and document a system of internal audits aimed at verifying the real and effective application of the company's gender equality policy and guidelines, as well as compliance with the instructions and procedures defined for this purpose. The audits are implemented according to the methods defined by the guidelines, with teams that are independent with respect to the activities audited, competent on the basis of requirements defined by the system (e.g. course on guidelines, minimum experience in the company, training on the company management system) and balanced in terms of gender. Audits must be planned, communicated and aimed at gathering objective evidence of compliance.