



WEED

Women Enterprise and Employment in local Development



Connecting cities
Building successes





EMPOWERING WOMEN IN THE LABOUR MARKET

CASE STUDY COMPENDIUM

SUPPLEMENT TO WEED ACTION LEARNING SET 2 REPORT

by

Professor Gill Scott, June 2010

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1. Introduction

The 'WEED project is part of the URBACT II programme¹ and brings together practitioners and policy makers in partnerships from a variety of cities within the cohesion and competitive regions of the European Union (EU). The objective of the project is to capitalize knowledge and practice around fostering the participation of women in the labour market and entrepreneurship development. It is based on the premise that local authorities can play an important role in transforming positively women's participation in local economic life. The overall goal of the project is to assist the nine partner cities to improve practice in relation to women, employment, entrepreneurship and new economy and to develop multi-stakeholder Local Action Plans that are linked to good practice project proposals for possible funding from ERDF, ESF or other EU or National sources of funding

The case studies presented here relate to city level actions to promote women's employment, to extend gender equality at work and to extend women's capacity to develop and participate fully in social enterprises. They were prepared following the second Action Learning Set, carried out in 2010. They reflect the diversity of interventions, organisations and funding involved. A significant number

comprise examples of good practice from partners in WEED and show how the adoption of locally based innovation can play a major role in exploring and implementing solutions to the economic crisis in away that does not lose sight of the European strategic framework for gender equality and show that measures to promote gender equality can be an important part of a strategy to address the economic and financial crisis

The case studies are organised in the following themes:

- National, regional and inter city strategies to support a gender equality perspective in employment and enterprise at local level
- Projects that encourage a cultural transformation amongst employers to provide more family friendly employment practices
- City level projects that help unemployed and employed women reconcile the demands of family and work
- Municipal funded and organised training initiatives to open up new less gendered pathways
- Measures that can encourage effective development of the type of social enterprise where women are likely to be found.
- Social enterprise and local development.

¹ URBACT is a European exchange and learning programme promoting sustainable economic development. For details see <http://urbact.eu/>

- Examples of gender budgeting and public procurement measures that can advance the position of women

Some are more detailed than others. Some have been the subject of research and evaluation, others have not. Some are examples that WEED partners have provided and others have been provided by external experts or are the result of research by the Lead Expert. All have direction to contacts or further information that readers can chase up. It is hoped they will provide a valuable resources for those wanting to consider the varied ways in which local initiatives can be developed to promote the empowerment of women at work.

The compendium should be read alongside the report of the Second Action Learning Set of WEED *Promoting better work and social enterprise for women*. Available at <http://urbact.eu/en/projects/human-capital-entrepreneurship/weed/our-activities/>

Section One:

National and regional strategies to support a gender equality perspective in employment and enterprise at local level

1. ESF Jämt (Equal): Regional Initiative, Sweden

(WEED partner example)

Summary

ESF Jämt (Equal) is a special aid organisation set up to run 2009 -2011 to improve gender mainstreaming in ESF projects. It is national initiative but works at regional/ county level. The purpose of ESF Jämt (Equal) is to offer regional level support for existing and prospective ESF projects to increase the quality of gender mainstreaming within projects. By providing tailored support, training in basic gender knowledge, advanced seminars and assistance with ESF applications the project has improved the gender impact of a variety o projects. ESF Jämt (Equal) was funded for two years, 2009 to 2011 to improve the quality of mainstreaming in existing and future ESF funded projects i.e. to put into practice “the (re) organisation, improvement, development and evaluation of policy processes, so that a gender equality perspective is incorporated in all policies at all levels and at all stages, by the actors normally involved in policy-making”. (Council of Europe). There is a need for a national as well as regional support in order to increase the quality of gender mainstreaming within the social fund projects in Sweden. General support for broadening gender awareness across the counties is involved and there is a desire to improve methodologies for the practical implementation of gender mainstreaming.

Lack of understanding of gender issues in a project organisation; poorly developed working model for gender mainstreaming; underdeveloped reviews of the work of a project from a gender equality perspective were the challenges that the project tries to address.

Main actors

The main actors involved in developing the project were initially four County Administrative Boards of Gotlands, Örebro, Värmlands and Västra Götalands counties i.e. bodies administering ESF funds. This has been extended to eight counties since the initial phase: Norrbotten County Administrative Board, Länsstyrelsen Västernorrland County Administrative Board Västernorrland, Länsstyrelsen Stockholm Stockholm County Administrative Board, Länsstyrelsen Västmanland Västmanland County Administrative Board, Länsstyrelsen Värmland Värmland County Administrative Board, Länsstyrelsen Västra Götaland County Administrative Board of Västra Götaland, Länsstyrelsen Jönköpings Län County Administrative Board Jönköping County, Länsstyrelsen Skåne Skåne County Administrative Board. The counties administer the project.

The support is quality assured, and established on a national as well as regional level. It is informed by a common mode of operation and includes an equivalent support nationwide. The organisation has a national coordinator subsuming the 8 (eight) regional parts.

Aims

The aim of the project is to establish an organisation, through the County Administrative Boards, offering support for gender mainstreaming which can lead to an increased level of quality and target achievement within ESF projects. The support is offered to prospective as well as granted projects, which are thereby given the tools and qualifications needed to integrate gender equality as a cross-cutting principle, incorporating the

gender dimension into the core activities of the projects.

Its innovative nature lies in the fact that *ESF Jämt (Equal)*'s aim is towards moving gender equality to the mainstream of the projects, and that it is included as a cross-cutting principle. The gender equality perspective is to be applied throughout the operation of the projects wherever decisions are made and wherever activities are undertaken. The support organisation can offer needs-tailored training, tools, methods, and support to the projects.

Development and methods

A pre study carried out by the four County Administrative Boards of Gotlands, Örebro, Värmlands and Västra Götalands counties in 2008 showed that there is a general lack of understanding and knowledge regarding gender mainstreaming, both in theory as well as in practical implementation within ESF-projects.

The support organisation offers the following:

- Briefings in relation to funding calls
- Individual consulting, including telephone and email support
- Training in basic gender knowledge, understanding and skills
- Workshops as well as advanced seminars allowing exchange of experience – national and transnational
- Information in connection with regional ESF calls
- National conferences
- National seminars about gender equality and accessibility
- Transnational activities

The process involves coaching and mentoring of projects towards innovative ways of delivering services and innovative projects. Methods and tools used included SWOT analysis with a gender perspective. This involved a 4R perspective

- R1. Representation – surveying gender representation
- R2. Resources – examining the allocation of resources
- R3. Realia – analyzing conditions
- R4. Realisation - formulating new objectives and measures

Participants

A variety of projects have benefited from the support e.g. the EQUAL FORESTRY project. This project aims to change attitudes towards employment in forestry. Its target groups are unemployed women, immigrants, youths and people with long-term sick leave. The process and activities within the project that have developed as a result of ESF Jämt (Equal) include: -

- Transnational exchange about gender mainstreaming in forestry
- Change attitudes about "woodmen/lumberjacks"
- Training in technique, psychology and group dynamics.

Sources and levels of funding

Level → 24,000,000.00 Swedish Kroner.

Sources of funding → Eight County Administrative Boards + ESF

Annual budget in Euro → 2,538,000.00 €

Impact and results

More projects will be considered eligible by ESF when it comes to gender mainstreaming.

95 percent of the participants are satisfied with the support. At least 4 (four) workshops have been offered in each of the 8 (eight) regions in connection with ESF calls. Individual consulting is offered to at least 50 projects a year in each of the 8 (eight) regions, both pilots (pre studies) as well as existing projects.

The beneficiaries are the project management and their service users. For example the project 'Validation in the North' was assisted by ESF Jämt (Equal) and this resulted in the following proposal

Validation in the North

The aim of the project is to develop the validation of knowledge and competence and explore the precondition to create validation centre in Norrbotten with different knowledge directions.

Target group: People with long-term sick leave, immigrants and unemployed

Activities:

- Develop a model for validation and unpaid care and household work.
- Cooperation between municipalities in Upper North

General impact / lessons

Improved approach and tools for gender mainstreaming. The success of the project has been helped by the Regional and city level support for concept and the inter county

partnership. Current concerns are that short term funding posing difficulties for long term planning of the type and level of support post 2011.

Contact for further details

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2. Including women in a local employment strategy

Municipal Level Initiative: Santiago de Compostela (WEED partner example)

Santiago de Compostela is the capital of the Galicia region in North-Western Spain. It has a population of close to 93 000 inhabitants. The employment situation in Santiago de Compostela is very similar to the rest of the country in that an increase has occurred in the unemployment rate of women in the local labour market. The economic crisis of the past two years has produced a very noticeable increase in male unemployment but in general the unemployment rate amongst women remains higher than that of the male population. The municipality wants to avoid the issue of employment becoming solely a question of gender at the same time as ensuring that a more universal approach is taken. Significant moves have been made to develop labour insertion programmes that involve both men and women and to increase the capacity of women as well as men in setting up new enterprises.

Aims and objectives

The city and region have an Equal Opportunities Strategic Plan (2008-2011)

The aim of the Plan is

- To promote measures to increase a better employment for women through advice and training.
- To give information about successful projects promoted by women.
- To promote training to improve career possibilities for women.
- To develop measures to help reconcile work and family life.
- To promote social responsibility in companies.

Development and methods

Local action on equalities is based on improving employability and access to the local labour market, and on promoting entrepreneurial activity in a number of areas including the knowledge economy. A local action plan and specific actions are being developed:

- To create a mentor net to promote women entrepreneurship, this can generate synergies and support lines for entrepreneurship projects.
- To support entrepreneur ideas promoted for women with innovator character and that generate employment.
- To support through a subsidy program, entrepreneur initiatives promoted for women when they are developed in Santiago de Compostela.
- To create subsidies for women employers who

contract women employees to work in their companies in Santiago de Compostela.

- To establish measures to promote the equality in the social responsibility of the companies of Santiago de Compostela.

Last year local development agencies took actions to improve women's employment consistent with the European, state and regional policy. This involved different policies of employment at the local level in such a way that the information, advice and the labour guidance and intermediation, are conditioned for a gender strategy in the labour market in public sector contracts in the promotion of entrepreneurship. The intention is to promote this in all sectors and works, and increasing entrepreneur projects promoted by women.

Strategies that were adopted were on the three themes developed at the different local development agencies of the city depending of the degree of specialization of each one:

Information, advice and mentoring. Information and advice for unemployed women has a personalized character and is structured through insertion itineraries with the active participation of women from the beginning in their development. In the same way, studies are conducted in designing training strategies and for labour intermediation according with the labour market.

Training. There are training courses for women to access to new local works, new technologies, and to promote the entrepreneurship.

Subsidies. There are subsidies to help reconcile work and family life, subsidies for companies to contract women and subsidies for business projects promoted by women.

In Galicia, the regional government is promoting the conditions for equality of individuals and groups and attempting to remove obstacles that prevent their full participation in Galician political, economic, cultural and social life. Changes in Statutes (2 / 2007) of 28 March, regarding equality of work for women in Galicia and the Decree 33/2009 regulates the promotion of equality in the workplace and the integration of the principle of equality in employment policies. With this, the regional government intends to promote effective equality between women and men. In order to achieve this new subsidies have been agreed. The amount of money involved for 2010 for the region of Galicia is:

- Line I: Subsidy for the implantation of an equality plan in a company. 335.677EUR.
- Line II: Subsidy to eliminate the low women representation in majority men sectors. 302.500EUR.
- Liña III: Subsidy for investments related to dinning room, nursery, and another rooms for pregnant workers to guarantee and improve the rights for conciliation of work and family life.

116.300 EUR.

Impact

The most effective strategy is felt to have a transversal character. There are subsidies to promote a better employment for women, but it is necessary to make additional efforts in order to promote the role of the women in the labour market as very important for the economic development. The diffusion of success as well as advice and training is necessary and sensitization of employers is one area that is still seen as necessary.

The greatest impact has occurred when there has been cooperation between local development agencies (employment and enterprise) Specialization of services and synergies are arising in order to promote a better employment for women at the labour market.

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3. Close the Gap, Scotland (UK)

Summary

Close the Gap was established in 2001, initially funded under the EQUAL programme and subsequently by the Scottish Government, as a partnership initiative to tackle the causes of the gender pay gap and develop practice in eliminating pay inequality in

Scotland.² The specific focus of Close the Gap is the persistent and enduring nature of the gender pay gap, and its intertwined causes including occupational segregation, employer and employee attitudes, pay systems and sex discrimination.

Main Actors and Activities

Close the Gap (CtG) works as a partnership between the Scottish Government Scottish Enterprise and Highlands and Islands Enterprise, Equality and Human Rights Commission, and the Scottish Trades Union Congress where it is based. The project works on specific issues and to develop good practice with enterprise and economic development agencies, sectoral lead bodies and employer organisations. In recent years, Close the Gap has focused its work on the business case for equal pay, targeting employers in the private sector to engage in the issues and develop good practice for enhanced business performance. The Financial Services Sector, including banking, which has been a significant stakeholder in Scotland's economy and a sizeable employer of women in Scotland, has been a particular area of focus for CtG recently. CtG engages with a range of stakeholders across employers, trade unions, civil society and public authorities. Through trade unions particularly it works to support workplace representatives build their knowledge and skill on equal pay issues.

² The perspective offered is entirely the analysis of the author, based on observation of Close the Gap in action at events, conferences, parliamentary evidence sessions and appraisal of material available on the project website at www.closethegap.org.uk, and of other related documentation.

CtG's approach is to evidence the business and economic case for equal pay through commissioned research and analysis, and the production of briefing materials and toolkits to support employers in developing equal pay practice. In addition to high-quality support materials, a series of individual case studies on specific organisation's approaches to developing equal pay systems are available on the CtG website. Despite being a very small team, comprising a Project Manager, two Development Officers, and an Administrative Assistant, CtG has covered a lot of ground, producing materials and reports, speaking at conferences, delivering workshops and training, and successfully partnering/linking with other initiatives and events with trade unions, community groups and other civil society organisations.

Development of Close the Gap

A Steering Group of the partner/funding agencies manages the project. While there have been no public setbacks, the different funding stakes and levels of presence at national or regional level are likely to be sources of tension that CtG has experienced. This again is in common with initiatives of this type that seek to bring together disparate agencies around a stated common goal – gender equality – but one that is variably reflected in the core business of the different partner agencies. For example, different business planning models and timeframes can mean that projects take longer to develop with specific partners and their stakeholders, as do different funding regimes and status. Furthermore, smaller voluntary organisations with uncertain and low levels of funding may find themselves forced to

withdraw from proposed initiatives due to lack of funding or pressures on already stretched financial and personnel resources.

While wholly funded by government and public agencies, CtG has succeeded in retaining a strong advocacy position on its core business of tackling the causes of the pay gap and reducing the pay gap in Scotland. However, consistency in messaging from Close the Gap has not necessarily resulted in consistency or firmness of action from the Scottish Government. For example, despite the clear input of Close the Gap in the Scottish Government's Interdepartmental Working Group on Occupational Segregation, little specific action has resulted from government to date. This is notwithstanding the Scottish Government's concern with occupational segregation that was made a specific priority within the ministerial priorities under the Gender Equality Duty.

Funding and Resources

Initially funded under the EQUAL programme from 2001-2005, CtG has been funded by the Scottish Executive and now Scottish Government. Currently, CtG has an annual budget £170,000, with very low levels additional contract income from other sources. The grant funding is due to end in March 2011, which has been, or has the capacity to be a de-stabilising factor.

Close the Gap is currently funded through the Equality Grants Programme of the Scottish Government and administered by Voluntary Action Fund (VAF). VAF is an independent not-for-profit organisation that administers, among

other grants programmes, the Equality Grants Programme of the Scottish Government. The Equality Grants Programme moved to a commissioning model of grant funding in 2008. This approach is concerned to work with organisations on an outcomes basis, aiming to “capture the change” across Scotland on equality issues.

CtG is currently not in receipt of funding from any of the European Union institutions or programmes, although it is represented on the Key Policies Group, and Good Practice Development Working Group of the East of Scotland European Partnership (ESEP Ltd.), which is the entity, contracted to deliver the European Structural Funds Programmes in Scotland.

Impact and Results

In its almost ten years of development, CtG has produced a considerable volume of materials – practice development, research, advocacy, and data. CtG has been represented at numerous conferences and events promoting equal pay, and the business and economic justice case for eliminating the gender pay gap. The impact of Close the Gap is evident in the repeated reference to the partnership in documentation from across the partner agencies and their own statements of action and commitment to tackle the pay gap. CtG secured a significant role in the writing and distribution of guidance accompanying the equal pay duty in Scotland. In addition, the project has distributed over 1,000 equal pay toolkits to SMEs, and 2,000+ sets of guidance on human resource management and pay for SMEs. Working directly with organisations, CtG has directly supported more than

50 pay audits, and has trained over 200 equal pay representatives within trade unions in Scotland. While it is difficult to ascertain exactly how many organisations have been in contact with CtG, over 2000 individuals have participated in CtG organised events and conferences.

While the pay gap stubbornly persists in Scotland – and elsewhere – there is evidence that CtG has had an impact on policy and practice in Scotland through the extensive networking achieved by the project workers. Organisations with whom CtG is linked include women’s campaigning and advocacy organisations, anti-poverty organisations, policy and practice development organisations as well as sectoral and governmental bodies. The consistent message that CtG brings to these distinct, but sometimes convergent arenas, is that that women’s unequal pay is bad for business, makes poor economic sense, maintains child and family poverty by keeping women’s wages low and unequal, and fails to deliver economic and gender justice.

Contact:

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4. European Charter for Equality of Women and Men in Local Life, various local authorities

Summary

The European Charter for Equality of Women and Men in Local Life was launched by the [Council of European Municipalities and Regions \(CEMR\)](#) in 2006. It sets down a number of basic principles to encourage local and regional governments in Europe to commit themselves to achieving the equal participation of women and men at all levels of public life and decision making. By signing the Charter, local and regional representatives and governments formally commit to the promotion of equality and the implementation of the commitments outlined within the document.

Aims and objectives

- Addressed to local & regional governments: as they are the levels closest to the citizens.
- To encourage local actors take a strong and formal public commitment to the principle of equality by signing the Charter
- To encourage signatory authorities to engage with the institutions and organisations in their territories, promoting achievement of real equality in practice

Development and methodology

CEMR, with the financial support of the European Commission, led a project in 2005 on 'The town for equality'. That project was aimed mainly at collecting best practice cases of gender equality in European local governments as well as at setting up a methodology to help local representatives achieve true

gender equality in their municipalities. At the end of the project, CEMR, with the support of the European Commission under 5th community action programme for equality between women and men, drafted a European charter for equality of women and men in local life. It was drawn up by CEMR in collaboration with the project partners and its national associations of European local and regional authorities.

The Charter is practical, it does not only present basic rights, and it proposes concrete methods by which these can be pursued. It is based on gender analysis and is proactive, insofar as it goes beyond condemning the persistence of inequalities, and encourages positive actions

Project partners included

«National Association of Municipalities in the Republic of Bulgaria
«Union of Cyprus Municipalities
«Union of Towns and Communities of the Czech Republic (SMO CR)
«Association of Finnish Local and Regional Authorities
«French Section of CEMR (AFCCRE)
«German Section of CEMR (RGRE)
«Central Union of Municipalities and Communities of Greece (KEDKE)
«Hungarian National Association of Local Authorities (TÖÖSZ)
«Italian Section of CEMR (AICCARE)
«Tuscan Federation of AICCARE
«Association of Luxembourg Towns and Municipalities (SYVICOL)
«Association of Polish Cities (ZMP)
«Spanish Federation of Municipalities and Provinces (FEMP)
«Basque Association of Municipalities (EUDEL)
«City of Vienna
«City of Saint Jean de la Ruelle
«City of Frankfurt am Main

«City of Cartagena
«City of Valencia
«Agency of Time and Mobility Belfort-Montbéliard
«Standing Committee Euro-Mediterranean Partnership of the Local and Regional Authorities (COPPEM)

The six fundamental principles of the Charter are

- * Equality of women and men is a fundamental right
- * In order to ensure the equality of women and men, multiple discriminations based on ethnic origin, disability, sexual orientation, religion, socio economic status... must also be addressed
- * The balanced participation of women and men in decision making is necessary for a democratic society
- * Gender stereotypes and the attitudes and assumptions that arise from them must be eliminated
- * A gender perspective must be taken into account in all activities of local and regional government
- * Properly resources action plans need to be drawn up and implemented.

The [text of the Charter](#) is available in several languages.

There is now a guide for the implementation of the Charter. This includes a step-by-step guide to practical and realisable actions that municipalities can take to make a difference to the equality of women and men in their area as well as suggested indicators for monitoring a local equality action plan. It is intended as a tool to help municipalities draw up an action plan as outlined in Part 11 of the charter

and to monitor change over time. See <http://www.epsu.org/a/3541>

Impact

Nearly 1000 towns, cities and regions have committed themselves to gender equality across the range of their powers, since the Charter was first launched.

These include Bonn (D), Vienna (A), Brussels (B), Stankovice (Cz), Valencia (E), Picardie (region)(F), Crotone (provincial govt.)(I), West Lothian (UK), Celje (SL), Uppsala (county) (S).

For further information

Council of European Municipalities and Regions
www.ccre.org/docs/charte_egalite_en.pdf

Section Two:

Projects that encourage a cultural transformation amongst employers to provide more family friendly employment practices

5. Certificate “Family kindly company”

Municipal Level Initiative: Celje, Slovenia (WEED partner example)

Summary

The current trend at EU level is to discuss and encourage the implementation of corporate policies to reconcile work and family life. Particularly since the Lisbon Summit in 2000, the EU has been drawing attention to corporate social responsibility as part of its economic and social reforms. There is a long tradition of national regulation regarding paid parental leave and subsidized childcare in Slovenia but until recently little active encouragement of practices to reconcile work and family amongst private employers. Such measures are important in a city like Celje (pop 49 000) where, despite a long history of women working the gender balance outside the public sector is weak. One of the ways that the municipality is addressing this is by encouraging corporate social responsibility ideas amongst companies. This is done by supporting the Institute EKVILAB in a certification process of companies as ‘family friendly’. Where it has been adopted women’s career prospects and conditions at work have improved.

Aims and objectives

1. To involve employers in improving the reconciliation of work and family life
 - Reducing the move towards longer working time affecting families in the city.
 - Encouraging greater equality between women and men (dividing work to man/women work)
2. To foster higher birth rate by making it possible to work and have a family life

Development and Methods

The initiative is based on the certificate “European work & family audit” established by German organisation Berufundfamilie and draws on the concept of Corporate Social Responsibility. The most commonly used definition of corporate social responsibility (CSR) at the EU level is defined as a concept in which companies on a voluntary level, concern for society and the environment in their daily operations and their relationships with stakeholders. As part of their actions they encourage, coordinate, support and implement projects from the area of corporate social responsibility and effective management of human resources aimed at educating and spreading of socially responsible action by all actors involved in global development.

Organisations interested in gaining a certificate can make application on public invitation. They have to meet all conditions from public invitation.

The Family Friendly certification is awarded to companies and NGOs that provide a mixture of:

- Flexible working time arrangements
- Home work

- Availability of distance working
- Parental leave or absence because of maternity or care of family members
- Child care arranged by company
- Absence because of schooling
- Providing employees with important information for families (health, social, prevention programmes and family service)

Acquisition of certificate follows an advisory and audit procedure, helping employers to include measure for better administration with human resources, with special attention on reconciliation work and family life of employees. The process is done with help of outside consultants.

Main actors

Users are: companies, public offices, NGO's with legal address in republic of Slovenia and with at least 10 employees. The municipality of Celje is involved in partnership: supporting the NGO that processes the certification. Parents are also involved in the process.

Source of funding

Municipality is involved in partnership as supporter of NGO. Financial subventions and EU structural funds.

Impact and Results

The Certificate provides additional reference for companies. In year 2007 32 certificates to companies were granted in and in 2008 17 certificates.

Companies with "Family Friendly company" certificate have achieved higher percentage of involvement of women in system of employment and

significant improvements in the number of women in higher position. At the same time it has contributed to more favourable working conditions (family service, childcare, etc) and more equal division of obligation of men and women in work and family and a rise in the birth rate (an important concern because projections for year 2030 show Slovenia won't have enough employees and will have to import persons /workers from other countries).

Measures are important and interesting as example of support for better employment for women.

For further information, contact:

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6. Economics for Equality, Scotland (UK)

Summary

Economics for Equality (E4E) is a research-based training programme for advocates for gender equality and policy-makers at local and national level. It aims to promote alternative approaches to economic thinking in public policy and to build the knowledge and capacity of all potential stakeholders to participate more fully in public policy processes.

Challenges

The key issue that E4E has sought to raise and address is the dominance of economic thinking that renders gender issues invisible in public policy and economic policy.

Context

Over the ten year period of the 'new' institutional arrangements in a Devolved Scotland and the raft of policy frameworks and policy drivers adopted by successive administrations a growing body of research evidence has consistently highlighted the absence of effective gender analysis in public policy objectives and initiatives in economic development, skills, training and enterprise. Analysis of resource allocation conducted by the Scottish Women's Budget Group and through academic research has highlighted the discrepancies between broad statements in support of gender equality and the direction of spending in public policy programmes, such as the Modern Apprenticeship programme and anti-poverty frameworks such as *Closing the Opportunity Gap, and Achieving Out Potential*.

Economics for Equality: Why Public Spending Matters was conceived in response to this growing evidence base, concern amongst equality practitioners and evidenced demand for alternative approaches to economic thinking and skills in policy making from policy professionals and equality advocates alike.³

Additional legislative and policy drivers for E4E include the introduction of the Gender Equality Duty in 2007 contained within the 2006 Equality Act, and the decisions of the Scottish Government elected in 2007 to re-align the relationship between central and local government with direct implications for the delivery of public services. The Gender Equality Duty (GED) requires all public authorities to ensure that policy proposals and programmes undergo robust equality impact assessment to inform programme and funding decisions. These developments represent significant changes in both the incorporation of gender analysis into public policy decision-making through the GED, effectively introducing a legal requirement for gender mainstreaming, and the more arms-length relationship between central and local government in Scotland.

E4E Aims and Objectives

- To build confidence and capacity in alternative economic theory for local activists and those involved in local community planning in

³ McKay, A., Campbell, J., Thomson, E., (2005) *Economics for Equality: Developing Fluency in Economics From a Feminist Economics Perspective*. Research Report for Fair Play Scotland and the Equal Opportunities Commission Scotland. December 2004

economic development and regeneration;

- To develop accessible training materials and learning opportunities for policy makers and equality advocates;
- To encourage policy makers and activists/gender equality advocates in a supported environment to exchange knowledge on policy issues and processes for better public policy;
- To disseminate current research findings and evidence on the implications of gender-blind policy and the alternative policy decisions that gender analysis makes possible
- To introduce gender budget analysis as both a concept and tool for gender analysis of public spending and policy decisions.

Development of Economics for Equality: Why Public Spending Matters

Economics for Equality (E4E) was developed from a series of research projects conducted by Glasgow Caledonian University (GCU) on behalf of Fair Play Scotland, an initiative for gender equality in economic development, and the Equal Opportunities Commission.⁴

E4E has developed through a series of pilot programmes. These aimed to disseminate research findings on a range of issues on the gender dimensions of poverty, the labour market and employment, and economic policy; and to build participants' knowledge of economic

models and dominant economic thinking in public policy and their capacity to engage in and even challenge public policy decisions.

Fair Play Scotland funded the first pilot, subsidising teaching materials, costs, and participation by individual women from across Scotland. The budget was a maximum of £10,000. Subsequently Oxfam GB financed the second and more extensive pilot through their UK Poverty Programme in Scotland with an enhanced budget of <£35,000 that covered costs of teaching time and materials, participant travel, administration, catering etc. Both pilot programmes have been offered on a no-charge basis to encourage and facilitate participation. The free access has been a significant success factor in the participation of women from voluntary organisations or who are volunteering for local or grassroots organisations.

Main Actors and Activities

The initial pilot drew participants from across Scotland and from the Scottish Women's Budget Group, as gender budget analysis has been a core component of the programme. The first programme focused on women and poverty, and the gender pay gap and occupational segregation, considering the gender dimensions of these issues from feminist economics and gendered public policy perspectives.

Topics covered in the modules delivered in 2008-09 included:

1. Explanation of key concepts relating to gender and the economy;
2. Relationship between gender and the economy and why gender matters;
3. Exploration of policy as it affects women, with particular

⁴ Until 2007, the statutory body for sex equality in Great Britain, replaced by the creation of the Equality and Human Rights Commission.

reference to women's disadvantaged position in the economy;

4. Causes and consequences of key areas of gender inequality including poverty, the pay gap, job segregation and childcare;
5. Importance of gender analysis through the policy process;
6. Current developments in equality legislation with a particular focus on those relating to gender issues;
7. Introduction to the concept of gender budget analysis and how it might be used in public spending.

Course tutors included senior academics and researchers from GUC and external gender experts. There were two parallel streams of participants in the latest pilot. In one, participants were drawn from local and grassroots women's organisations offering support, information, advice and advocacy projects. In the second stream, participants came from local authorities, health boards, voluntary organisations, housing association and an equality partnership organisation. Both programmes have evaluated positively, with participants rating the content and the support very highly. In particular, women activists felt empowered and more confident to engage with policy makers drawing on their newly acquired knowledge and the wider perspective and range of tools the course had provided. Indicative comments from participants include:

Impact and Results

The pilot programmes have benefited women activists from local and grassroots organisations, and policy professionals from local authorities, local economic development agencies,

health authorities, and other public agencies. Participants in the pilots are increasingly applying the knowledge and confidence gained in the core issues in their work and advocacy for gender equality. It appears that the model of E4E has captured the imagination of policy makers and advocates alike given the feedback and requests for follow on courses and seminars. In terms of transferability and replicability, the E4E model could be reasonably straightforward as the core materials drew on standard texts in feminist economics, neo-classical economics, and current policy frameworks specific to the local and national context in Scotland that could be substituted for appropriate alternatives in other country/regional contexts. The programme 'owners' are engaged in the ongoing process of seeking follow-on funding, and potential partners with whom to develop a more sustainable funding stream to allow the development and spread of the programme. Potential partners include trade unions, feminist organisations and networks, economic development and regeneration networks, feminist academic networks - including economic and public policy networks.

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7. Good Practices for Reconciling Work and Family Life : Guide for Companies (Portugal)

Summary

This 2007 guide was produced by the Ministry of Labour and Social Solidarity, Commission for Equality in Labour and Employment in Portugal and lists a range of principles and practices that promote gender balance by allowing women to allocate more time to their careers and men to devote more time to family life. It also lists ways of optimising human resources, thereby making a significant contribution to greater productivity and business innovation. The primary objective was to raise awareness amongst employers but was also aimed at the social partners and at workers, be they male or female. It provides them with information on measures and forms of work organisation that provide solutions to their problems when it comes to reconciling work and family life. This is a way of raising their awareness about issues that can be subject to negotiation with a view to adapting work conditions to the daily needs of modern day society.

The measures presented in the guide to help reconcile work and family life included

1. Creating childcare services
2. Creating care services for the elderly
3. Parental leave for working fathers and mothers
4. Incentives for fathers to participate more in family life
5. Flexible work organisation

The guide also provides examples of good practice. Amongst these are: -

Bruno Janz, a company which makes water and electricity meters, formed an association of which both the company and its staff are members. The association has a crèche, a kindergarten and a primary school. To start with they only took staff members' children, but then they opened their doors to others as well. They organise cultural and sporting activities and seek to give the children a quality education.

The **airline TAP** has a nursery school for its staff's children. The company currently also has a 24-hour-a-day crèche and kindergarten, so as to enable both its flight crews and its ground personnel on shift work to leave their children at the centre when they are working at night.

At **Grafe, an advertising company**, parents can bring small children into the company when they need to solve a crisis at short notice. The layout of the company's offices is designed to facilitate this possibility. There are also cases of couples that both work for the company and share looking after their children at the office while they are waiting for them to get a place at a nursery school.

The bank **Caixa Económica Montepio Geral** gives its staff childcare grants to support their family and school needs. Montepio Geral's own social services include a whole variety of programmes for employees' children—especially holiday camps and arrangements with babysitting companies.

The **Loures Municipal Water and Sanitation Service (SMASCML)** tries to adapt its shifts to the needs of staff with small children. For example, where both parents work as road sweepers, their schedules are

determined in such a way that one of them can always stay at home to look after the children.

The Guide represents a working tool for employers who are looking for an initial idea of what they can do to promote the necessary balance between two spheres of our personal lives – work and the family. The set of measures presented in this Guide are intended as a number of suggestions for things that can be done to promote equal opportunities and avoid both the vertical and horizontal segregation that characterises women's employment currently. At the same time it provides practical solutions to the problems that families are experiencing in modern societies, in which both women and men work. As each company has its own characteristics, this Guide seeks to raise employers' awareness of key current issues and to provide them with a broad range of measures from which they can choose those which will most easily enable them to optimise their human capital's potential, improve their competitiveness, and promote corporate social responsibility.

For further details see

Guerreiro M, Lourenco,V and Pereira I (2007) *Good Practices for reconciling work and Family: a guide for companies*. Ministry of Labour and Social Solidarity.
www.cite.gov.pt/imgs/downloads/Good%20Practices%20Ebook.pdf

8. Section Three: City level projects that help unemployed and employed women reconcile the demands of family and work

Opening Access to training for women (OA2F)

Municipal Level Initiative: Amiens, France (WEED partner example)

Summary

The national network of Centres for women information and rights (CIDFF) is a network that is central to local authority and government policies in terms of women equality. The OA2F activity carried out by the CIDFF in Amiens is one very good example of a municipal level initiative aimed at empowerment women as they seek to return to the labour market. Women are an important part of the labour force. They constituted 43 per cent of the employed labour force in Amiens in 2006, a slightly lower rate than the 47 per cent in France as a whole but it is more difficult for women to access employment and women with more than two children and young people are the most exposed to the vagaries of the economy in the city. A survey carried out since the city became involved in the WEED project showed the necessity of an action for 'optimising access to training for women'. CIDFF have taken this forward with the support of the municipality. It involves the provision and management of financial help for the additional expenses women with children face in accessing training.

Aims and objectives

There are four objectives;

1. Promoting women's autonomy towards employment and training
2. Reducing the number of women who give up training
3. Helping women get back to work
4. Providing a user centred service

Development and Methods

The survey carried out before the initiative showed there was unequal access to training between women and men. Women were leaving training sessions because of financial difficulties, often at an earlier stage than men because they feel more responsible about family financial matters. OA2F offers financial help to complement training initiatives and funds the additional expenses faced by women such as accommodation, transport, meals, childcare and pedagogical equipment.

Beneficiaries are women over 16, unemployed, living in the Somme area and already registered for local training sessions. They must already have funding for their central training costs and be eligible for subsidised funding. Recipients must also have no or low level of qualifications or have qualifications that are out of date.

OA2F through CIDFF helps each woman fill in their application and this is submitted to a commission organised each 4 to 6 weeks. This commission then gathers financial partners to examine the application and funds available. On acceptance of the programme a woman must sign a commitment contract and agree the financial plan drawn up by the commission. The women must prove monthly that they have actually attended the training sessions whereupon their agreed expenses are

paid i.e. it is a monthly allowance not a lump sum.

Between September 2008 and August 2009, i.e. its first year of funding 51,520€ were distributed and 60 women benefited from the action.

Distribution of the help was

- Transportation 60%
- Meals 20%
- Accommodation 12%
- Childcare 4%
- Pedagogical equipment 4%

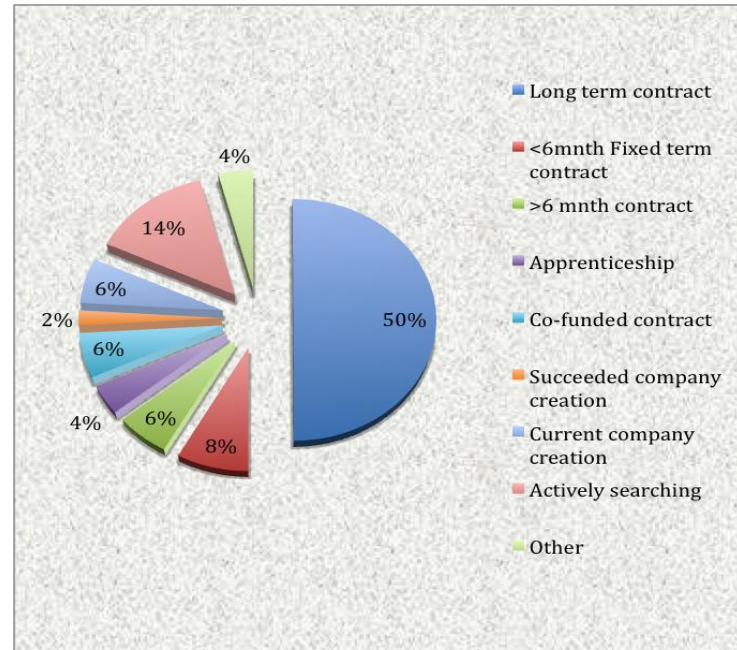
Source of funding

Picardie Region and European structural funds

Impact

- Reduction in the number of women who gave up their training course: none of the women who received assistance abandoned their course of training.
- 98% of women validated their training session.
- 72% of the women involved returned to employment.

Nature of employment for those who returned to employment: -



For further information, contact:

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22 22 01 94

9. Municipal support for creche provision

Municipal Level Initiative: Karvina, Czech Republic (WEED partner example)

Context

During Communism, when the Czech Republic's traditional three-year maternity leave was shortened to only one year, a state-supported *jesle* (daycare) system filled the gaps that grandparents and other family members couldn't. However, once the maternity leave returned to its three-year status, most *jesle* closed and childcare again became a role filled primarily by mothers or shared among extended family members. So whilst the Czech Republic was a country with one of the highest percentages of pre-school children in formal childcare in 1980s, it is currently among the countries with the lowest percentage of children under the age of three in formal childcare. As a result public crèche provision is predominantly provided at the discretion of municipalities. Pressure on municipalities to do so is as reductions in the current arrangements for parental leave and parental benefit occur due to budget restrictions and the increasing population and increasing numbers of women wanting to be in the labour force are leading to increased demands for crèche provision for under threes. Municipal responses become a key factor for the reconciliation of work and family. In Karvina (pop 63 000) women play an important role in the labour force but their employment rate when they have very young children is low, their skills tend to be underutilized and returning from maternity leave is difficult. The lack of crèche provision means that low-income households are particularly

at risk of poverty, especially if there are no other family members to take on the role of childcare.

Aims and objectives

To develop a range of actions/strategy to reconcile work and family life
To provide high quality care and education for children of young mothers returning to the labour market who for various reasons cannot stay on maternity leave for the entire period of 3 or 4 years.

Development and methods

The city has developed a crèche facility for young mothers who have to return to work from economic necessity. The municipality has responded to this challenge by supporting a facility in the city that meets the needs of women who are on low income and returning to the labour market or maintaining employment after the birth of a child. The crèche has 30 places and serves 65 children.

It is focused primarily on small children from infant age up to the age of 3, whose mothers are returning early to the labour market, for various reasons. These women do not want to lose continuity in their jobs or are from underprivileged families, where the return of mother to the work is very important for economic reasons.

The Sociální služby Karviná (Karviná Social Service) organization that operates the crèche has its own website, where parents can find necessary information about the operation of the crèche facility. The demand continues to be high, but because parents are allowed to use this facility for as little as 5 days in a month, it is possible to fill the day-to-

day vacancies with short-term stays by children. Currently there are 65 children registered for a capacity of 30 children (not all of them are attending daily).

Services provided by the crèche include day-long care for children by trainee personnel (nurses) including babysitting, feeding (providing healthy food), walks, health exercises, acupressure, inhalations, etc.

Price – the price of the crèche facility service is currently 2,5 EUR/ per day/ per child for regular full-month attendance. In case of attendance of children for a selected 5 days in a month for parents that are receiving the maternity allowance and at the same time working part-time, the price is set to 6 EUR / 1 day.

Funding

The promoter (Statutory City of Karviná) of the Sociální služby Karviná

allowance organization currently subsidizes the stay of 1 child in the facility for an average with 450 EUR per month (the calculation of the average subsidy from the promoter is for the period 01/2008-06/2008).

Impact

The benefits: - improved safety of children in the facility and improved satisfaction of spending time in a new, pleasant and aesthetically pleasing environment

Reduced unemployment rate of women with small children due to their return to the labour market

Utilization of the facility also for leisure time activities for parents with children.

For further information, contact:

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Section Four

Municipal funded and organised training initiatives to open up new less gendered pathways

10. Attraktiv arbetsplats på lika villkor

Municipal Level Initiative: UMEA, Sweden. (WEED partner example)

Summary

Like the rest of Sweden the city of Umea (pop 111 000) has a long tradition of public sector support for childcare and care for elderly. This has meant many women could go out in the labour market but there is extreme gender segregation in labour market when they do. Most women work in the public sector and strong gender stereotypes exist regarding what men and women “should” be doing. The Attraktiv Arbetsplats is a project funded and supported by the municipality to address one aspect of the gender segregation. Its aim is to recruit more men to a traditionally woman dominated profession – the school meals service- and to improve the conditions for all employees. It involved training and workshops and produced significant changes in men’s attitudes towards the sector and increased self esteem for those already working in the sector.

Aims and objectives

- To Recruit more men to a traditionally woman dominated profession and improve the conditions for employees in the meal time service to develop and thereby improve the status of the profession.

- Use gender equality as a method for developing the work organization and the profession
- Create an attractive workplace for both men and women
- Try new approaches to work duties to decrease the numbers of long term illness
- More men employed in the meal time service

Development and methods

The project ran between 2005-2007 and originated directly from the municipality of Umea. . It comprised two training programmes designed and planned by the municipality itself. This has involved planning content and training material for the workshops, organising the workshop and observing the process and impact.

There were two elements to the project: training of unemployed men in an area traditionally associated as ‘women’s work’ and a staff programme of education on gender equality.

There were 14 participants on the training course for the unemployed men and 163 staff from school restaurants on the staff education programmes. Both courses were planned in collaboration with the school restaurants in order to meet their specific needs. Many of the teachers for the course were the staff from the school restaurants. This was a methodology used to challenge the existing staff, making them less afraid of the new people and showing them and others how skilful they are.

Course content included

- Gender theory and about power issues of society
- Gender equality policy and politics

- History of ideas and Women's history
- Statistics
- Equality policy and law
- Labour market issues
- Men's violence against women
- Gender stereotypes and gender roles
- Gender in media and workshop on images/analysis of pictures and media
- Techniques of empowerment
- Gender mainstreaming
- City planning and tour with a gender perspective

All participants had to prepare an interview with an older person and ask them about gender roles when they had been small, and then prepare a short presentation for their group at the course.

They also had observation tasks to go and analyse toyshops with a gender perspective.

The group of men already working as employed at the restaurant who went to the staff education course also discussed the following topics with an all-male group:

- Macho ideals and what it is to be a man today, demands and expectations
- Pornography and the view on women in pornography
- Men's violence against women

The group of 14 men training to start working in the school restaurants also discussed the above, and values and attitudes linked to the specific environment around children and teenagers – working at a school.

Many of the teachers for this course were the staff from the school restaurants. This was a methodology used to challenge the existing staff,

making them less afraid of the new people and showing them and others how skilful they are. It was really empowering.

Source of funding

Municipality of Umeå, Swedish Employment Service and the EU Structural Funds

Impact

The results of pre employment training for men in the service were that

- The segregated labour market was partly broken- more men are in the school restaurants than before.
- Role models were changed- the children see that men can also do the dishes, give them food, cook etc.
- Changing attitudes – men started phoning to get on the list for future courses
- New ways of organising work were tested - creating full time employment in traditional female dominated work where part time jobs are the norm.

In addition, seven got long-term posts in the school meals service, 3 got shorter term employment and one took parental leave.

The results of the staff-training programme were Higher self-esteem for group previously thought of as uneducated, low paid workers.

Salaries have increased with municipal targets for these groups. Pay gap between women and men has decreased.

Such results highlight the possibility of achieving real change when a gender relations rather than solely women focused approach is adopted.

Wider impact was seen in the fact that work rotation was created in two work places following the courses and staff has begun to know each other across the 43 school restaurants and appreciate their own professionalism.

Contact and more information

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11. 'What's Stopping you', Business Link, Medway, Kent

Local Level Initiative: Kent Business Link, UK. (WEED partner example)

Summary

'What's stopping you' is a pre start up course designed particularly for unemployed women in Kent. Business Link Kent provides affordable advice and support across North Kent to people who are thinking of starting a business and new and established businesses. It is an area where, as in the rest of the UK, unemployment is taking its toll and the impact of welfare reform means many unemployed women are expected to come off benefits and seek work or self-employment. Their programme wanted to address women who:

- have no confidence in themselves and therefore don't access mainstream programmes
- have become disenchanted with their lives
- have been long term unemployed – have a history of benefit dependence

- have been on long term incapacity benefits
- are lone parents
- have lost their jobs and feel disillusioned
- have partners who don't value them outside the home

Aims and Objectives

- Helping women who will not access mainstream services to address their future without pressurising them.
- Turning their hobby or passion into a business, or using their transferable skills to enter the labour market or to start further training.
- Encourage women to explore their options and look for ways of expanding their knowledge,

Development and Methods

Initial Awareness Raising workshop 'What's stopping you?'

- Women only event
- Informal and matter of fact workshop
- Panel of women start ups telling their story
- Used to inspire participants to sign up for more specialised workshops delivered by women for women.

Follow up workshops 'What are you waiting for?'

- Series of 3 full day workshops over 3 weeks – one a week – to help them discover more about themselves.
- FREE workshops
- Supportive and encouraging environment where women can

talk to other women, share their ideas and find out whether working for themselves is right for them.

- Relaxed format
- Learning through creative activities and “doing” rather than sitting and listening.

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Funding and resources

‘What’s Stopping You? - 10k for minimum of 100 – 200 people attending with packs of info to be given out as well as exhibitor packs et. 2 people full time for 6 weeks to organise marketing, venue, catering, and speakers. ‘What are you waiting for’ - £2500 per set of 3 workshops: cost of venues, trainers, catering and travel or childcare costs of attendees who need additional financial help.

Impact

The inspirational days were oversubscribed and in some cases we had to arrange another event to cater for demand. Women were so enthusiastic that we didn’t have enough room on our follow up workshops and had to move those that could cope directly onto the regional start up programme. Booking onto further events either to research more on start up, go directly to the start up programme, indicate a desire to return to work or to further education. Each attendee was followed up by our start up adviser and give the help required to advance their ideas. About 30% of all attendees either went on to attend either the pre start workshops, or the mainstream start up workshops.

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12. Women and Work: Sector
Pathways, Doncaster Council, UK

Summary

The "Women & Work" project was a UK Government initiative to help women across nine sectors secure better training to fulfil their potential. It is estimated unlocking the potential of women in the labour market could be worth between £15 and £23 billion to the UK economy. The Government investment was matched by contributions from employers to provide skills training, development and support. The project was delivered by the Sector Skills Councils in conjunction with employers. Doncaster Council provided the matched funding for Asset Skills to provide a programme for women working in the council’s specialist cleaning service: Metro Clean.

Aims and objectives

- To give women chance to train for a new job in Metro Cleaning
- To give women the chance to progress within the company into higher skilled, better paid jobs.
- Raising the awareness of employers in these sectors of the challenges that women employees and potential employees face and encouraging them to take action.

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Development and methods

Asset Skills is the sector skills council for facilities management, housing, property, planning, cleaning and parking. It ran the Women and Work programme in the cleaning industry. Metro Clean is responsible for cleaning around 425 council owned premises, including 116 schools

The training centred on a development programme that included leadership skills and on-the-job learning like new infection control methods. The programme was designed to give the team a greater understanding of what operations managers and their assistants have to deal with when working across the council.

Source of funding

UK Government, Doncaster Council (50%)

Impact

The results of pre employment training service were that:

- Confidence improved amongst participants.
- Leadership and team management skills were developed. Participants felt better able to work in a team.
- Productivity increased
- Significant increase in staff retention.
- Raised earnings for 20% of participants.
- Range of positive individual case studies produced – improved role models in the service.
- Additional interest by employer and training providers in facilitating high quality training.

An evaluation of the Women and Work Sector Skills Initiative by IFF research in 2008 concluded that

‘Overall the initiative has been most successful in engaging with those employers who have training and development infrastructures and / or monitor gender issues in their workforce. Participating employers tended to be medium or large and small/micro businesses were under-represented across the initiative as a whole. More than half of the employers engaged had 50 or more staff (although employers of this size represent only 2% of employers across England as a whole). Just over three in five employers stated that they already monitored their workplace profile, recruitment and/or pay scales with respect to gender.’⁵

They further reported that the initiative was successful in reaching those who would not normally receive training. Of those who were in employment when they started on the initiative, only 30% had received training in the last 12 months (compared to 63% on average across the country as a whole). Only half had ever received off-the-job training from their employer. This was despite the fact that the employers that they worked for were more likely than average to have structured planning for training.

Contact and more information

⁵ IFF Research Ltd (2008) Evaluation of Women and Works Sector Pathways Initiative : Research Report prepared for the UK Commission for Employment and Skills

Training organisation - Asset skills
<http://www.assetskills.org>

Project evaluation: Evaluation of
Women and Works Sector Pathways
Initiative
<http://www.ukces.org.uk/tags/women/evaluation-of-women-and-work-sector-pathways-initiative>

Additional case studies
<http://www.equalities.gov.uk/search.aspx?terms=sector+skills>

Section Five

Measures that can encourage effective development of the type of social enterprise where women are likely to be found.

13. Childcare cooperatives, PAN , Italy

The Context

In a country where the volume of female workforce is growing and the traditional in-house methods of family childcare services are out-of-date, the need to offer a better standard both in term of quality and affordable prices has finally emerged. The Pan Project originates in the social cooperatives sector. The Italian legislation had already recognised this form of social co-operatives back in 1991 (act 381/91).

Social co-operatives in Italy are defined as follows:

- The objective is the general benefit of the community and the social integration of citizens
- Type A co-operatives provide health, social or educational services
- Type B co-operatives integrate disadvantaged people into the labour market.
- Various categories of stakeholder may become members, including paid employees, beneficiaries, volunteers (up to 50% of members), financial investors and public institutions. In type B co-operatives, at least 30% of the members must be from disadvantaged target groups
- A co-operative has legal personality and limited liability

- The voting system is one person one vote.

At present time, there are over 7300 social cooperatives in Italy of which 59% provide social services including services for children.

A national law regulates the Italian scenario for child care services, while the specific regulations are decided by regional authorities. As a consequence, a different modus operandi from one Italian region to another results in a non-standardized day nursery system.

Aims and Objectives

The Pan Project was born in 2004 with the objective

- To generate within three years at least 5000 new places for kids in the day nurseries.
- To develop in those areas where this type of facility was absent.
- To offer good quality, affordable childcare
- To develop the services for children through the social enterprise formula, an entrepreneurial form coherent with the 'public' purpose of these services.

The Actors

PAN is an initiative of CGM, the most important network of social co-operatives in the country (it groups more than 1200 co-operatives), whose purpose is to promote the community wellbeing by planning and promoting quality services at low prices. The FIS (Federation of Social Enterprises of Compagnia delle Opere) and Consortium DROM of LegaCoop are also participating in the project. FIS, CGM and DROM represent over 70% of social enterprises in Italy, with 130,000 workers and almost 3 billion

Euros turnover. Another founding partner of PAN is Intesa San Paolo, one of the main European banking institutes, which pays special attention to the needs and projects promoted by social enterprises.

Local governments responsible for the administration of child care services and families or private/public companies interested on creating “company nurseries” are also playing an important role as partners.

Development and Methods

At the present time PAN is the biggest Italian network for early childhood services and it is the best solution for:

- Social entrepreneurs that aim to develop childcare services
- Families that find in the PAN day care centres a superior quality service

PAN offers planning and start-up assistance to organisations and people interested in establishing new types of services for children in the form of social enterprises. It also offers financial tools designed to support the company’s investment decisions. A guaranteed quality trademark is given to all social enterprises members of PAN with quality check tools, including the “Guidelines”, which form the knowledge and educational milestone of services. PAN also provides to its members with qualified training, a common communication plan, many events such the ‘National Child Day’, conferences and seminars which involve its members but also the region representatives and public bodies all together.

In collaboration with Intesa San Paolo, PAN offers financial tools to families in the form of extended loans structured specifically to facilitate the payment of the service.

Legal and Organisational Structure

The Scientific and Support Committees are PAN’s two vital bodies for achieving the targets set. The two committees are working side by side with the Assembly, Steering Committee and the Board of statutory auditors. The Scientific Committee is formed by experts coming from universities and research centres and its task is to supervise all activities concerning the ‘evaluation manual’, vocational training proposals for evaluators and training proposals for coordinators and nurseries’ teachers. The Support Committee manages the network secretariat activities, training courses, communications and proposals for the Assembly and Steering Committee.

Legally, PAN has been formed as a Consortium of enterprises where its associates are the four founding members: CGM, Drom, FIS and Intesa San Paolo. Most of PAN’s day nurseries have the legal form of social co-operatives (q few ones are associations).

Finance

Banca Intesa contributes to the PAN Project by making available funding up to 150,000 Euros with optimum financial conditions and without general obligation bonds payments. Beneficiaries can be either selected young entrepreneurs supported by social enterprises networks, or operating social enterprises that want to expand or re-structure following PAN’s quality guidelines.

There are special financial advantages for those families that enrol their kids to a PAN’s child care day centre, such as: monthly payment reduction and funding opportunities for covering the day centre costs in 4 years affordable monthly rates instead of payments

within 2/3 years (from 2,000 € up to a max of 18,000 €).

PAN Child care schools are functioning as social enterprises on the public market (i.e. partnerships with Town Halls for managing childcare services) and private market (i.e. services provided directly to families).

Impact

In just four years, PAN has successfully built 140 new infant schools with 4,311 available places and 943 new jobs. Nowadays there are in Italy 370-day nursery centres, which take care of about 10,600 children and employ more than 2,550 people.

The employment creation related to child care schools, directly (for infant school teachers) and indirectly (for mothers that can return to their work status making use of the day nursery service), generates income and larger amounts of tax rates and capital levies compared to schools maintenance costs that public administrations usually incur. Additionally, the consistent capitalisation of the employment potential implicit in the development of supply gives back the advantages to provide new jobs (especially for women), to compete with the local economic developments and to value human capital.

The success of PAN lies in: -

- The wide range of services provided (financial management, advisory services, management support, vocational training, financial tools, and annual communication plan).
- Innovation: establishing the collaboration between different organisations has been the drawing power for PAN development.

- The quality check pattern. Organisations with PAN trademark must follow several requirements that guarantee the good standard of the service and the good balance between price and quality. The requirements needed concern the management for the education and the administration of the services provided (trainings for teachers, good standard living environments, good outdoor-indoor space optimisation and high quality food supply).
- PAN Early Childhood services answer to the needs of children and their families.
- The frequent liaison with public institutions at national and local level contributes to share the 'public' purpose in the childcare services. It also facilitates the dialogue about day nursery services policies and it produces joined projects for the needs of each regions. PAN presents itself to the local administrations as a tool for expand early childhood socio-educational services and, at the same time, for participating actively to the creation of employment opportunities where entrepreneurial and technical skills along with social responsibility and respect for the rules are all pre-requisites.

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14. CASA Care & Share Associates (UK)

The context

In UK, like in most European countries, the market for quality home care services is set to expand significantly, for both economic and demographic reasons. The vast majority of commentators and forecasters agree that, as people are living longer, the pressure on the care sector is set to increase. In addition, an ageing population not only means more demand for care, but also increased pension pressure. It has also been recognised by all mainstream political parties, policy forums, and voluntary sector groups that the vast majority of people want to stay in their own homes for as long as is practicable. Finally, spiralling costs of both hospital and residential care, and increased pressure on public sector health and social care budgets, mean further demand for increasingly complex home care services.

Aims and objectives

Given this market context, players in the social enterprise home care sector, principally the award-winning employee-owned Sunderland Home Care Associates (SHCA), established Care & Share Associates (CASA) in 2004 in order to democratise this growing market.

CASA's mission is to: *Democratise home-care in the UK - to greatly enhance the 'social enterprise take' of the UK's Health and Social Care market through robust competition with the private sector, and close collaboration with the public sector. This will be achieved through the replication of successful social enterprise models working within the*

health and social care sector, using social franchising techniques.

In the most recent years the concept of social franchising has been more and more associated to social enterprises and proposed as a tool for their development. It is about spreading experience from successful social enterprises so that more people become employed. In addition, that these companies apply democracy in such a way that the potential of all employees is developed. Social franchising also builds a community by stimulating contacts among employees in different companies and efforts toward common goals.

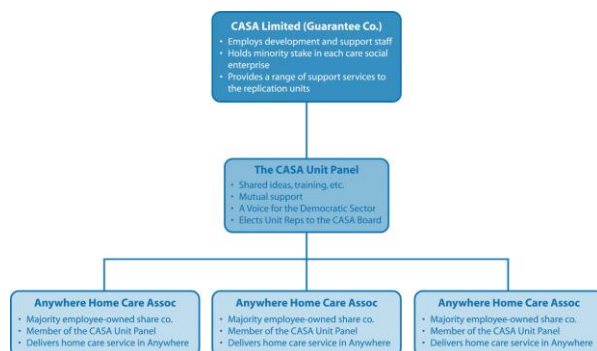
Development and Methods

CASA and its satellite units are based upon the Sunderland HCA model.

SHCA was established in 1994 following Sunderland Council's call for expressions of interest in providing domiciliary care. A local resident and keen social entrepreneur, Margaret Elliot, successfully submitted a business plan. Sunderland Home Care Associates was established and an initial contract from the council for 450 weekly hours of care enabled the business to recruit its first 20 employees. It now provides up to 3,800 hours of care per week and employs 180 staff. Most of the staff are women, and this flexibility of working time is a very important factor for them, especially those who already have family caring responsibilities. The company has also diversified out of home care.

While SHCA increased the range of services it provided, the company made a conscious decision to remain a locally focused provider rather than looking to expand geographically. It therefore supported the establishment of CASA to 'export' its successful model to other parts of the UK, via

social franchising techniques. From its base in Sunderland, Care & Share Associates (CASA) launched a chain of employee-owned home care companies. CASA is based on the franchise model where a franchisor (CASA limited) promotes and allows the creation of franchisees (Home Care Associations). The diagram below sets out the organisational relationship between CASA and its associated replication units:



Key actors

Experience teaches that one of the most critical steps in getting a new care business up and running is finding a good manager who has experience of home care, and installing them ahead of time. But before that stage can be reached, the necessary partners have to be brought in board. These include the local social services department, the employment services and whichever body is responsible for regeneration in the area concerned.

Funding and resource

CASA Units are social enterprises operating on the market, whose main customers are public authorities contracting out care services. The average turnover is £500,000 (£581,000), with an average staff of 40.

Core funding for CASA in its early stages has been provided by the European EQUAL-funded project INSPIRE, while each new business requires an initial investment of around £150,000 (equivalent to 174,000 euros) from local funders and a commitment from the local authority to purchase a specified number of hours once the company is established. In addition CASA has an ongoing relationship with Co-operative and Community Finance, a social finance provider, who have made loan agreements to each new unit to contribute towards working capital.

Success factors

- Strong and entrepreneurial management team.
- Proven business model and track record.
- Attention to quality as a key competitive factor. The company constantly monitors the service it is providing, and employs four supervisors who are continually making the rounds to ensure that quality is up to scratch. Users are also asked to comment on their level of satisfaction with aspects such as the carers' timekeeping and disposition.
- Better business model. Incentivised stakeholder staff results in:
 - better pay
 - better terms and conditions
 - increased investment in training
 - lower staff turnover - an average of 3% to 5% across SHCA and the CASA replication units, as opposed to 30% in the private sector. Such a low staff turnover leads

to improved continuity and quality of care.

- A commitment to local recruitment and training adds to the stock of care-workers, and therefore public sector 'buy-in'.
- Service re-design.
- Individual ownership of shares means 'owners' working at the coalface.
- Wealth created is likely to be spent in the community. This contributes to a holistic approach to well being, in that it addresses the issue that poverty and health are intrinsically linked.
- Developed relationship with financiers.
- A 'no nonsense' prospectus, business manual and development methodology.

Impact

Since its establishment in 2003, CASA has:

- Established Care & Share Associates (CASA) – a sectoral development organisation for the independent and democratic care sector.
- Developed five commercially viable replication units based upon the Sunderland Homecare Associates Model.

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Section Six: Social Enterprise and Local Economic Development

The most relevant examples of social enterprises supporting local development can be found in multi-stakeholder organisations, which are usually controlled either by volunteers or by users and workers. These organisations implement community development objectives by involving different actors, such as local authorities, associations representing the civil society and businesses, and other non-profit organisations. Community development companies can often be seen as network of co-motivated actors emerging out of the need to create trust and social cohesion, which are conducive to the production of new and often tacit, knowledge. Many social co-operatives in Italy and entrepreneurial non-profits in the United Kingdom actively participate in the formulation and implementation of local development strategies without any lucrative purpose.

15. COOMPANION (Sweden) Context

The Swedish CDAs (Co-operative development agencies) are a unique example of an organisation that for three decades has been able to preserve and adapt its structure to changing contexts and to maintain a balance between community and association, centre and periphery, and entrepreneurship and public service. They were inaugurated in the early 1980s as an essentially spontaneous process of local self-organisation within a highly structured institutional environment. The first rudimentary

CDAs were created and backed by local funding. In 1986, the government launched a national Co-operative Programme to promote and fund the creation of CDAs. By the time the programme became operational, the situation had changed (youth unemployment had decreased and traditional co-operative sectors lost interest), and so newborn CDAs were left without a clear mission and were essentially forced to reinvent themselves, shaping new practices and looking for new tasks, members and sponsors. In doing so, they laid the cornerstone for a new model. At the local level, a reorientation towards new fields of operation was facilitated by the realignment of the health and welfare system in the late 1980s (through the introduction of co-operative forms of service provision) and closer co-operation with municipal authorities, which became increasingly, involved in the care, welfare and labour market fields.

At the national level, informal modes of co-operation were established, primarily through the government consultative body, the Co-operative Council. Exchange of experiences and tools also took place informally. This process was supported by both a national organisation founded by the CDA workers, the FKU, and Koopi, the Co-operative Institute.

Description of initiative

Presently, there are 25 local branches of Coompanion (the new brand name of the CDA system) that are federated at the national level. The local agencies are fully independent and are generally constituted as cooperatives, whose members are co-operative enterprises, voluntary associations, local authorities, non-formal educational organisations and trade unions. At the national level,

Coompanion Sweden is a federation of the regional CDAs with a limited mandate. The national body is financed by a member/service fee paid by the members.

Coompanion's mandatory activities include the dissemination of information to the public and the provision of initial counselling services free of charge to the general public and would-be co-operative entrepreneurs. Beyond this, the goals and activities of the CDAs are not regulated, and they are fully independent and free to launch additional projects or to undertake paid-for consultancy.

CDAs work mainly at the local level in collaboration with local authorities and all the other actors concerned, but they are also involved in national and international projects. An important working tool is the webbased course and discussion forum Lärka44 that links the CDAs and is open to their consultants and board members (Larka Portal, 2008). The forum facilitates learning and methodological development as the organisations explore new fields of activity.

At the national level, the role of Coompanion Sweden is to lobby national government and to co-ordinate priority actions decided by the General Assembly.

CDAs and their consultants act primarily as social entrepreneurs and knowledge brokers, that:

- Design and/or diffuse new organisational models.
- Mobilise potential financing bodies.
- Facilitate the formation of supporting coalitions and partnerships between them.

In the recent years, thanks also to their participation in the Equal programme, CDAs gave a specific attention to social enterprises, supporting their

development and lobbying for new specific legislation.

Financing and resources

One important element of the success and impressive performance of the system can be identified in its financing mechanism, which provides local organisations with a robust institutional base.

The procedural framework for the creation of a new CDA and the rules for defining eligibility for public support anticipated the European Union's matching financing mechanisms. To establish a CDA, a local founder association has to collect matching financing from its members or other local organisations. Once the founders secure financing, the CDA is entitled to receive state co-financing. Central financing sets a general budgetary framework, and defines Coompanion's mandatory tasks.

Together, local and central funding form the CDA's baseline operating budget, which provides for the employment of a skeleton staff, and finances the mandatory activities.

The principles that apply to the inauguration of a CDA also apply (with some minor modifications) in the allocation of public support in the years that follow. In other words, a CDA is expected to mobilise matching financing each year to qualify for a budgetary allocation - an arrangement that creates an institutional safeguard for the CDA's local embeddedness.

However, this situation makes CDAs a permanent hybrid between a project and a permanent institution.

Governance

Since its beginnings, the system has functioned as a community of practice. Beyond associating organisations and public bodies, Coompanion is first and

foremost (both historically and demographically) an organisation that associates its co-operative consultants, producing and spreading knowledge and competence across the entire group. The strong bonds, friendships and shared identity that link the group of consultants (and large sections of the CDAs' Boards) form the organisation's initial human and social capital. Thanks to frequent informal meetings and common projects, the system has succeeded in preserving this important feature, even as the group grew and the membership changed.

Two levels of partnership characterise the CDAs' action. The "internal" partnership is constituted by Coompanion members, who represent the various actors in the sphere of local development. Recently, local Coompanion branches have also developed broader partnerships encompassing all the economic and social actors in the area they cover. The first example of this type of platform, now replicated by various CDAs, was promoted by Stockholm CDA in the framework of the EQUAL project SLUP (SLUP, 2008). The "Platform for local development with social economy" was created in 2000 and is now linked to the public sector and the government's mainstream development planning process. It involves more than 40 organisations, including two banks, and operates through six working groups. These regional platforms seem to get a boost from funding from the European Union Structural Funds.

Results and impact

Over the last 20 years, Coompanion has become a major player in local development and the creation of social enterprises and co-operatives. CDAs are an effective form of providing both

services and tools to the social economy and have developed broad and sustainable regional partnerships. CDAs can also be used to develop additional support structures such as new networks, associations and institutions. The model is successful in both urban and rural areas, even if the priorities are often different. Social enterprises were from the beginning more popular among urban CDAs, while in the countryside the focus was on traditional co-operatives.

However, in rural areas, the need to establish social enterprises has also been acknowledged as an important factor for labour market integration.

From a political perspective, Coompanion has been supported by both left and right wing governments and also by economic actors. In 2006, the government introduced work integration as a major priority of its programme. Thanks also to the good results of the EQUAL programme, NUTEK (the national agency for business development) in collaboration with Coompanion submitted a programme to recognise and support social enterprises as a work integration tool, thus creating substantial opportunities to develop the sector.

The CDA model could be used in other countries. It was created and still exists (although in an attenuated form) in the United Kingdom, is developed as a national system in Sweden and has spread to the Baltic countries, Poland and Slovakia. At the international level, contacts are in place with Vietnam and with Latin American countries where the co-operative movement is already well established.

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16. Coopératives d'activités et d'emploi (Business and employment co-operatives) - France

Context

Business and employment co-operatives are a new style of business incubators that take advantage of co-operative principles to foster peer support among new entrepreneurs.

During the 80s to face the unemployment situation, the French government looked at self-employment and business initiatives to stimulate the economy. But the rate of private businesses, sole traders or partnerships failures was very high. There are several reasons for this:

- Running and developing a business requires real skills! No one can learn these skills in a few weeks.
- Too often starting a business was the only alternative to unemployment.
- Being an entrepreneur is a lonely job and few are well-equipped to handle the demands of making a business work – and last.

In 1995, the Business and Employment Co-operatives (BECs) were created to respond to this situation.

Aims and objectives

BECs philosophy is based on the fact that the success of sole traders lies in a shared structure and in creating a network.

Their main objectives are to:

- give entrepreneurs a real chance and make running a business less risky;
- offer an alternative and innovative way to do business: collective entrepreneurship.

Description of initiative

Like other business creation support schemes, BECs enable budding entrepreneurs to experiment with their business idea while benefiting from a secure income. The innovation BECs introduce is that once the business is established the entrepreneur is not forced to leave and set up independently, but can stay and become a full member of the co-operative. The microenterprises thus combine to form one multi-activity enterprise whose members provide a mutually supportive environment for each other.

A BEC thus provides budding business people with an easy transition from inactivity to self-employment, but in a collective framework.

The process has three stages:

- Stage 1 – Supported entrepreneur
Initially, the 'candidate business' works up his idea while remaining unemployed in legal terms. He or she continues to receive unemployment benefit while developing a marketable product or service, testing the market and establishing a client base. The BEC handles the business administration and accounting.

- Stage 2 – Salaried entrepreneur
If the business idea looks like being a success, the entrepreneur agrees a part-time employment contract with the BEC, and in return pays over 10% of sales. He or she continues to build up the business, as well as receiving training and administrative support. Meanwhile he or she benefits from

social insurance cover. The salary grows as the business grows.

- Stage 3 – Member entrepreneur

When the business is self-supporting, the entrepreneur can choose to join the BEC as a full voting member, and take part in its management, continuing to pay an administration charge of 10% of sales. Optionally, the business can spin off as a totally independent entity.

The BEC helps entrepreneurs to create their own business, and their own job alone or in a group, while avoiding the obstacles involved in creating a limited company. It also satisfies certain social needs by offering an alternative business solution. In fact, BECs allow a small business person to achieve control over their working life, but with the support of a group of people who are facing the same problems and want to pool their enthusiasm and expertise. They help to overcome one of the most discouraging features of becoming selfemployed – isolation. They thus lower the bar for becoming an entrepreneur, and open up new horizons for people who have ambition but who lack the skills or confidence needed to set off entirely on their own – or who simply want to carry on an independent economic activity but within a supportive group context.

BEC are active in all sorts of activities from cookery, industrial cleaning, furniture restoration and organic horticulture to violin making, jewellery, translation and web design.

Financing and resources

BECs, in general, rely on a combination of earned and grant financing. The earned portion is derived by levying a service charge of 10% of turnover on the member

businesses. This is complemented with grant income from local authorities that wish to encourage entrepreneurship. This usually concerned the Conseils régionaux (Regional Councils) as it is at this level that responsibility for business start-up support lies. At national level, the federations receive grant income from various government departments including the Délégation générale à l'emploi et à la formation professionnelle (DGEFP- General Direction for Employment and Vocational Training) as regards training, the Délégation interministérielle à l'innovation, à l'expérimentation sociale et à l'économie sociale (DIIESES – Inter-ministry Direction for Innovation, Social Experimentation and Social Economy) as regards the social economy aspect, the Délégation interministérielle à la ville (Div – Inter-ministry Direction for Cities) as regards urban regeneration and l'Agence nationale pour la cohésion sociale et l'égalité des chances (ACSé – National Agency for Social Cohesion and Equal Opportunities) as regards the inclusion of minorities (Ministère du Travail, des Relations Sociales, de la famille et de la Solidarité – Ministry of Work, Social Affairs Family and Solidarity, 2008; Ministère du Logement et de la Ville – Ministry of Housing and Cities 2008). Other financing is provided by the Caisse des Dépôts et Consignations (Government Deposit and Consignation Office), the Fondation MACIF and other foundations (Caisse des Dépôts, 2008; Fondation Macif, 2008).

Legal structure and governance

BECs are established as independent co-operatives, and in France are legally SCOPs (workers' co-

operatives). Membership includes the support staff and those entrepreneurs who have established themselves and taken up the option to become members.

The majority of BECs are members of the national network Coopérer pour Entreprendre, which has trademarked the name. It is progressively establishing a regional structure. Coopérer pour Entreprendre action focuses on three fields:

- promote transfer of know-how from existing BECs to new ones, in order to ensure the quality of services provided,
- develop exchanges at European level in order to disseminate the concept and the formula of BECs;
- a communication plan to spread information to the business world, the institutions and the general public.

A smaller network also exists, based in the Rhône-Alpes region, COPEA, which has around 20 member 'activity co-operatives' and there are also several unaffiliated co-operatives of this type.

Results and impact

Business and employment co-operatives (BECs) represent a new approach to providing support to the creation of new businesses. The first BEC was started in France in 1996, since then a further 74 such enterprises operating in 145 locations across the country have sprung up. They have so far helped 4 000 entrepreneurs. Two-thirds of entrepreneurs start off as unemployed, two-thirds are aged between 30 and 50 and 53% are women.

The idea has also been adopted in Belgium, Sweden, Quebec, Morocco and Madagascar.

BECs have created interest in various areas of policy-making:

- Economic development in rural areas, as BECs are a good way to support the so-called SOHO-SOLOs (small office/home office workers), professionals who migrate to the countryside to carry on their business at a distance – and in so doing bring valuable skills, economic activity and social life back to depopulated areas.
- The regularisation of informal work.
- Demography and concern about how to raise the activity rate to counter the effect of an ageing population..

BECs are a very transferable experience. A number of BECs are active in Belgium and Sweden, and individual BECs have been set up in Morocco, Poland, Madagascar and Quebec.

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Section Seven: Gender Budgeting, Procurement and Equalities

Public procurement is about buying goods and services of the right quality and at the right price and about treating all suppliers fairly. The chance to compete for a public contract is a strong incentive for potential suppliers to live up to specific legislation. Putting conditions into a contract or specification can encourage certain labour conditions e/g/ wages and other terms and conditions of employment, equality between men and women, inclusion of specific groups. The object of EU law is to remove obstacles to the effective functioning of the internal market and the risk of discrimination of foreign suppliers. The European Parliament, though, has also taken steps to encourage more consideration of green issues and is currently drafting a Guide on Socially Responsible Public Procurement to mainstream anti-discrimination and positive action into the many domains that are affected by public procurement. The following case studies provide evidence of how social considerations can be built into procurement.

17. Delivering gender equality via procurement, London Fire Brigade, UK

Summary

London Fire Brigade is the world's largest fire and rescue service, with 7200 staff. The Mayor of London is the major funder of the service and has set the 'modernisation of the

working environment for a diverse workforce' as a key priority. The Fire Brigade itself aims to ensure that equality and diversity runs through all activities. The service has a major procurement function in relation to its suppliers and has taken steps to support diversity through procurement practice.

Aims and Objectives

- To support more diverse businesses through procurement practice
- To meet needs of female fire-fighters more effectively through better supplier specifications.

Development and Methods

Specifying new kit for female firefighters. From 1999 until 2010 there had been no new specification of kit despite the fact that there had been an increase from 61 to 268 female firefighters. New specifications for suppliers were drawn up that refined the cut for women and varied sizes for a better fit. Together with new specifications for Gas Tight suits, this ensured more effective and safer equipment for workers,

Supporting skills in the supply chain. Women represent only 10% of the UK construction workforce. LFB is major purchaser of building and maintenance for the fire service buildings. Since 2005 LFB and Transport for London included supplier diversity in tenders and contracts for the East London Line, established an Employment and Training Taskforce and persuaded contractors to introduce female work placements and apprenticeships and 'Women into Construction Day'.

Supporting diverse business.

Women own 15% of British business but win only 3% of public contracts. In order to address this LFB introduced clearer pre-qualification processes, more transparent advertising of contracts, move towards paying invoices from SMEs in 10 days.

Impact

Greater diversity in suppliers, more effective responses to female workforce in LFB.

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18. Equalities and procurement, Stevenage (UK) Municipal Level Initiative UK

Introduction

Is it possible to integrate social considerations into public procurement? For example, is it permissible to promote gender equality through public contracts? The 2004 public procurement directives (2004/17/EC and 2004/18/EC) allow for the use, within certain limits, of government procurement as a strategic policy instrument to combat racism, institutional discrimination and to promote equal opportunities for minorities, men and women and disabled persons.

The use of such directives is particularly evident at levels of government below the national level. The adoption of linkage between procurement and non-discrimination requirements can be seen by several

Länder (states) in Germany and a range of local authorities in the United Kingdom.

From 6 April 2007, in the UK there has been a public sector duty to promote gender equality. This has significant implications for public procurement. Public authorities now need to assess the relevance of gender equality issues to their procurements. For example, in letting a contract for providing careers advice to young people, the gender equality duty would be relevant because the service would need to cater to the needs of both girls and boys. It would be appropriate to ensure that the supplier did not discriminate in providing advice and information and that the needs of both genders were met. It is not relevant to every procurement. For example, SMEs, including women-owned businesses, could be discouraged because they do not have the resources to meet additional requirements not directly relevant to delivering the contract. Finding ways of making procurement more gender or equality sensitive is a difficult and legal process but there are increasing examples of how this is being taken forward. Stevenage provides a case study of one local authority's experience

The case is not specifically gender related this case study but provides evidence of how equalities can be built into the procurement process.

Stevenage was the first of the UK's post-war new towns. It has a population of about 80,000 people and whilst set in relatively wealthy, semi-rural countryside it has the kind of needs and problems usually associated with large urban areas. The town has a higher than average number of young people and a lower

than average number of older people. Fifteen per cent of the population experiences a limiting long-term illness, which is the highest in the region. Stevenage Borough Council regards equalities as a core responsibility: tender exercises are required to assess short-listed suppliers for their equality credentials. The following is an example of how equalities were built into one tendering/ procurement exercise.

Development and Methods

Stevenage has a policy for all service areas to undertake equality impact assessments (EqIAs). These focus on the specific services and policies relevant to the service area.

The council needed new revenues and benefits IT system that was accessible and met the needs of users and staff. An EqIA was conducted with members of Evaluation and Policy teams on the software.

The impacts and findings were taken forward to the drafting of the specification and tender document. Potential contractors were asked how they could meet the following requirements – identified in the EqIA:

- how does the system provide logical, simple and speedy screen navigation, including navigation between screens, flexible menu operation and transaction loops?
- what on-screen help facilities are available?
- what support is there for assisting visually impaired and disabled users accessing the system?
- what software and hardware tools assist the disabled and visually impaired user?
- what national, European and international standards does the system adhere to in relation

supporting accessibility of the system?

An evaluation model was designed that specifically incorporated equality requirements. The model is weighted with 70 per cent for quality and 30 per cent for price. The quality section included seven sub-sections with the equality section given a weighting of 10 per cent.

In addition, the tender procedure included an assessment of the tenderer's company status. This measures their company in terms of financial standing, capacity and so on. Within this is also a general assessment of the company's policies towards equalities.

Further checks on how each tenderer conforms to council requirements were checked with site visits – client live systems. In addition, the tenderer often provided demonstrations of their systems at the council.

All these checks and assessments were continually fed into the scoring evaluation until the council was satisfied. Stevenage had identified the tenderer that provided the best value and delivered all requirements regarding equalities.

Actors

Council officials included the:

- interim procurement manager
- head of revenues and benefits
- policy officer: equalities and diversity.

Impact

A revenue and benefits system has been introduced that meets the needs of its users, our staff.

The system is still in its infancy but a review will take place later to determine whether further improvements are necessary.

Key learning

- The customer comes first – think about the needs of the customer and be inclusive to ensure that all those who require a service can use it.
- It is not costly – equality and diversity can be incorporated successfully into procurement without causing significant extra costs or resources.
- Get it right first time – getting the contracted service correct and ‘fit for purpose’ first time round is crucial: it may cost more initially but longer-term savings will be gained and your reputation will remain intact.
- It would have been better if more staff were involved in the process. This would have allowed for a greater understanding of the potential impacts of delivering the system for staff. The adjustments required to better support different needs could then have been quickly identified.

Next steps

The council has started to integrate equality and diversity into other contracts and procurement. Recently, a procurement exercise was carried out on a staffing agency tender in partnership with several other local authorities.

Further information

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For further information see:

European Women’s Lobby (2004)

Gender Budgeting Overview

19. Equalities and municipal employment, Alzira (Spain)
Municipal Level Initiative, Spain
(WEED partner example)

Summary

In Alzira (pop 43 000) the municipality has developed a Plan of Development of Employment 2009 directed to Families with special employment difficulties. Before the beginning of the crisis, there were 1157 women and 704 men (Total 1861) unemployed in Alzira in November 2007; in March 2010 the number of unemployed in Alzira was 2259 Women and 2317 men (Total 4.576). A 95% increase in the case of women, and 229% in the case of men with no sign of recovery, we think that we are in a process of stabilization. In that context the efforts of the municipality are focused on supporting the unemployed that don’t receive any income because they have exhausted their unemployment benefits. Consequently, the municipality developed the “EMPLOYMENT DEVELOPMENT PLAN DIRECTED TO FAMILIES OF ALZIRA WITH SPECIAL DIFFICULTIES OF EMPLOYMENT” This initiative is based in the Municipality department of Economic Promotion and Employment and starts an ambitious and innovative employment plan with the objective of creating a sufficient labour situation to overcome this difficulty. This local initiative, united with the Grants for the Creation of Enterprises in Alzira and with the Grants for labour insertion, are the main programs which IDEA (Agency of Local Development), contribute to increase the number of

the citizens' of Alzira inserted into the labour market. In the last year, the City council has also started the Service "We Speak", where information of all the measures of the different administration (local, National, European) to fight this crisis is provided to the Citizens.

Aims and Objectives

To offer municipal employment for works or services of general interest to unemployed families of Alzira, in which the circumstance is that all the members of the family unit are unemployed, or have special employment difficulties, giving priority to the family unit that is not receiving any income.

Development and Methods

Specific rules for the Plan of Development of Employment directed to families of Alzira with special employment difficulties was approved by the Municipality of Alzira on June 24th 2009.

The initiative provides temporary jobs to one member of those families of Alzira, in which all members of the family unit are unemployed, or have special employment difficulties, so as to contribute to overcome the economic current situation. At the same time, these works will improve the municipal services and they will benefit our city.

Beneficiaries of the plan are all unemployed people, or with special employment difficulties, without incomes, or the families those in which the annual incomes of the family unit don't pass the 6.326,86 €, equivalent quantity to the Public Indicator of Rent of Multiple Effects for 2009 (IPREM)

that are in this situation in the moment of the application.

The family unit, for the purpose of applications is understood as family unit, the unit of coexistence formed by two or more people united by matrimonial or another form of permanent relationship similar to the married one, for adoption, for consanguinity until the second grade. In this context, lone parent families will be also considered as family unit.

Beneficiaries

- The beneficiaries of the program contemplated in the previous article will complete the following requirements:
- To be in unemployment situation, as for the applicant as the rest of members of the family unit, or to have special employment difficulties.
- That none of the members of the family unit receive incomes, benefits or rents for any concept or the annual incomes of the family unit don't pass the 6.326,86 €.
- The whole family unit should be registered in Alzira, at least for 36 uninterrupted months previously to the application.

There can be only one application per FAMILY UNIT in the Registration Office of the Municipality of Alzira. The department responsible for the selection process is the Department of Economical Promotion and Employment, through the Local Agency of Development "IDEA". In each application will be attached as many annexes as members in labour age are in the family unit, where each one of them will formalize their wish of participating in the program and it will indicate the category or professional skills that they can develop.

The work places will be awarded a contract of six months.

The numbers of contracts and their duration will be determined by the following circumstances:

- 1) adaptation of the professional profile of the selected workers to the available professional Category places.
- 2) The salary will be determined according to the Collective Agreement of personal labour of the Municipality of Alzira.
- 3) Available Budget.

Funding

The total budget of the Plan approved by the Municipality of Alzira is 120.000 € (It depends on the results of the plan, the budget could be increased).

Impact

It is still too early to determine the full impact but evaluation will be carried out by a technician of the following municipal departments: Human Resources, Social Services and Agency of Local Development in the Municipality of Alzira.

The Municipality also has tools to invest in enterprises at the same time as address the social impact of the recession. Using Grants for the Creation of Enterprises in Alzira and with the Grants for labour insertion the municipality is encouraging public works and investments in order to reactivate the economy and to favour small to medium sized companies. Previously a company would have to present a project and it would be judged on price and project. Now, to have a project approved by the municipality a third consideration is included – its social impact, particularly on families where there is no earner.

Further information

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20. Developing Methodologies in Gender Budget Analysis
Regional Level Initiatives, Spain and Italy

Summary

Gender Budget Analysis (GBA) is an approach to public policy making that examines how budgetary allocations affect the economic and social opportunities of women and men. The following case studies are presented as a composite overview of some of the tools of analysis and methodologies in gender budgeting being developed and applied in different country/regional contexts. These are specifically, Italian regional and municipal governments and the Autonomous Community government of Andalucía.

Definitions

Jubeto and O'Hagan (2010) cite recent studies on⁶ gender and economic

⁶ See for example two documents on this issue on EU web site:

http://ec.europa.eu/employment_social/equ_op/documents/growth_en.pdf, and

http://ec.europa.eu/employment_social/employ

growth that highlight the costs of gender inequality in terms of lower productivity, efficiency and economic growth⁷, and how some gender budget initiatives (GBI) have been framed as approaches to gender justice and more effective public policy. The European Commission's feasibility study on Gender Budgeting in 2008 considered that such experiences "show that the rationale for doing gender budgeting is as much about improving efficiency, effectiveness, transparency and accountability in policy making and resource allocation, as it is about achieving gender equality and gender mainstreaming goals"⁸.

Gender budget analysis requires local authorities to ask these questions about how resources are allocated to local priorities and policy objectives, and to use that analysis to guard against policy decisions that continue or exacerbate these divisions and the consequent inequalities. Across Europe, there are a number of gender budget initiatives underway at different levels of government, building on different analytical approaches but with a common goal of eliminating gender equality and ensuring that public resources are directed to securing outcomes that are more equitable for women and men.

Development and Methods

This section considers two prominent examples of gender budget initiatives

[ment analysis/gender/equal opps as prod fact.pdf](#)

⁷ European Gender Budgeting Network (2008): *Contribution by the European Gender Budgeting Network to the Public Consultation in view of the 2008/2009 Budget Review*.

⁸ European Commission, *DG Budget*, 2008.

currently active within the EU member states at regional and municipal government level.

1. Proyecto G+: Junta de Andalucía, Spain

The regional government of Andalucía began its approach to gender budgeting in 2003. The processes has been characterised by systematic construction of legal and procedural frameworks to support and secure an approach to building in gender analysis across policy formulation, resource allocation, implementation and monitoring processes. This summary focuses on the development of a specific framework for policy appraisal: the G+ Project, where the G means gender.

First implemented in 2007, Proyecto G+ is an overarching, whole government approach, intended to be applied across a large and complex organisational structure with wide ranging competences. These mirrors, to greater and lesser degrees, the realities faced by most regional and municipal authorities. In 2009, the budget managed by the regional government, the Junta de Andalucía (JdA), was €33,764,000,043.00. Through the layers of the policy appraisal processes, strategic objectives are to be met following practical and procedural processes. All programme proposals, across all budget lines are subject to a rigorous analysis of their contribution to gender equality. Policy proposals are appraised according to a number of criteria, but principally the extent to which the proposal will act as a "motor for change" in achieving the gender equality objectives of the authority, as set out in the Gender Equality Action Plan, and multiple policy documents on economic growth and competitiveness. Supporting the

process is a framework of operational objectives, which also reflect resource commitment from the Junta de Andalucía, in addition to the political commitment that has been necessary to secure this significant shift in practice.

Programme managers are required to assess programmes to identify the extent to which they are motors for equality, and then to attribute a ranking to each one.

Figure 1: **Ranking scale in Proyecto G+**

G+ Scale	
Gender Sensitivity	
Relevance	No
Yes	No
<p>Low</p> <p>g1</p> <p>Programmes impact directly on individuals, but are primarily internal content or process related</p>	<p>g0</p> <p>Programmes have no direct effect on individuals, with little or no gender</p>
<p>Medium</p> <p>Programmes are low impact, reduced transformative capacity or little functional relevance</p>	<p>G</p>
<p>High</p> <p>Programme is of high interest due to its transformative capacity, impact and recognised functional relevance</p>	<p>G+</p>

Source: Informe de Evaluación de Impacto de Género del Presupuesto de la Comunidad

Autónoma de Andalucía para 2008, Junta de Andalucía, 2007: 24

In appraising programmes for ranking within the G+ scale all programmes require to include and assess sex disaggregated data. As the programmes progress through the ranking scale, they are required to provide increasing levels of data, and evidence of analysis of gender impact, usage or proposed tools to improve data quality and analysis, and tools to improve programme design. These steps are intended to address inequalities or gender-based differentials, identify specific action to address inequalities with related indicators, and set out “strategic, operational, and activity objectives for the achievement of equality within the remit of the programme,” (Junta de Andalucía, (2008) Handbook on Proyecto G+).

The Gender Impact Evaluation Report for the 2009 Budget gives a positive description of how Proyecto G+ has rolled out across departments, as both a strategic and developmental process and tool for the administration.

Further information is available at <http://www.juntadeandalucia.es/economia/hacienda/>.

2. Wellbeing and Gender Budgets, Italy

“The novelty of Wellbeing Gender Budgets does not lie in choosing well-being as the basis of policies, for in theory that is already the public aim *par excellence*. What is new is the use of a framework of economic analysis that recognizes new connections and brings out the results of

policies for the level of well-being, in other words revising the usual hierarchy between economic and social data” (Addabbo et al. 2008).

According to Addabbo et al. (2008), the approach had been applied at regional level to the Emilia Romagna, Piedmont, and Lazio Regions; and at district level in Modena, Bologna, and Rome. At municipal level, the well-being gender budgets approach was being applied to budget analysis in the city of Modena. Approaches varied across the different authorities, but a principal activity was drawing up an agreed list of capabilities for individuals’ functioning that exposes the overlap between public authority responsibilities and the rationale for the public resources they receive, and the well-being of citizens. In the Rome experience, the list of capabilities included:

Access to knowledge

- Capability to live a health life
- Capability to work and carry on business
- Access to public resources (services/transfers)
- To live and work in adequate and secure places and in an eco-compatible environment
- To travel
- Caring for others
- Caring for oneself
- Participating in public life and living in an equitable society

This list covers the principal areas of responsibility for public services at the level of the city council and therefore broadly mirrors the responsibilities of local government authorities at municipal and district, and even regional level, according to different

government structures in different countries.

The purpose of the exercise of establishing well-being gender budgets is to identify gender inequalities, as they exist within several dimensions of well-being - which requires quality data to be available. It also aims to include analysis of access to resources across specific periods and points in the life cycle in order to pinpoint resource allocation and the outcomes being secured by the authority. Mapping out the budgets allocated across local authority departments makes visible departmental contributions to the agreed capabilities, and allows policy makers and elected members thereafter to conduct a re-appraisal and perhaps appropriate re-direction of public resources to meet the needs of local citizens more effectively. Addabbo and others have written extensively about this approach, which is complex in appearance and practice, but which transforms the approach to budget setting and resource allocation of local government by creating a very different starting point for public finance resource management: the well-being of the citizen from a gender perspective.

In a specific project in the **province of Siena (2008)**, eight out of thirty-six local municipalities, or comuni, participated in a pilot project, working together as a network to introduce gender budgeting tools and analysis into their processes.

The councils agreed key policy objectives, which resonate with the interests of WEED partners. Working alongside external academic experts, council officials formed a focus group that met over a five-month period to consider resource allocation and

service provision that contributed to the agreed objectives:

- Reconciliation of work and family, focussing on child care and on care of the elderly
- respectively
- Gender empowerment, focussing on women in decision making positions within local government
- Social integration of migrants, with the main focus on female care migrants

Key lessons from this small-scale project are relevant to other contexts and highlight the mix of actions and stakeholders required for successful gender budget initiatives. mix of policy and technical tools that can be drawn upon.

Tools

Professor Diane Elson a set of seven tools in 1999 for the Commonwealth Secretariat as part of its Gender Budget Initiative⁹. The tools are set out in the recent Council of Europe Handbook on “Gender budgeting: practical implementation”, from which the following text is drawn (Quinn, 2009:35).

- Beneficiary assessment of policies and programmes
- Measure how public expenditure is distributed between men and women
- Evaluate impact of budget spend on men and women.
- Show how public expenditure as a whole addresses gender inequality

⁹ <http://www.thecommonwealth.org/gender/>,
<http://www.thecommonwealth.org/>.

- Show how spending will affect time use of men and women
- Build in gender to medium term economic policy framework
- Examine how direct and indirect taxes are paid by different categories of individuals and households¹⁰

Actors and Activities

Based on experience to date, the principal actors in a successful gender budget initiative must include finance departments and management as well as management and technical officials from service departments. While some gender budget initiatives are ‘inside’ government, where only officials and elected members are involved, others are ‘outside’ government and include or are even driven by external bodies such as local campaign groups or women’s organisations.

The experience in Andalucía stands out from other examples because of the early leadership from the Finance Dept., and the continuing and high profile support of the Minister for Finance. Initiatives in other administrations that have not had similar levels of engagement from finance, and have been less enduring. The involvement of external stakeholders, such as WEED Local Action Groups, and Local Planning Partnerships, would significantly enhance the qualitative analysis upon which a gender budget initiative could build.

¹⁰ *Handbook on Gender Budgeting: Practical Implementation*, Council of Europe 2009, Sheila Quinn

Conclusions

Gender Budget Analysis offers an exciting route into policy making at local authority level. Budget setting is a central part of the policy making process, and has been assumed to be neutral in terms of the relevance to or impact on gender. In practice, however, public budgets will continue to reflect and perpetuate inequalities unless spending and resource allocations are assessed for their gender impact, and the policies that are funded under public budgets are subject to robust gender analysis.

Gender Budget Analysis is an approach that supports the development of local plans, as it entails the engagement of local actors – within the policy and programme bodies such as local authorities and other public agencies, and from local citizen and other stakeholder groups.

Gender Budget Analysis is about better policy-making, ensuring resources are directed towards evidenced need, and to make for more

targeted outcomes meaning local citizens are better

For further information see:

O'Hagan (2010) Case Studies in gender analysis for economic development. Prepared for Women, Enterprise and Economic Development (WEED) project within URBACT II Programme. Available at <http://urbact.eu/en/projects/human-capital-entrepreneurship/weed/homepage/>

URBACT II

URBACT is a European exchange and learning programme promoting sustainable urban development.

It enables cities to work together to develop solutions to major urban challenges, reaffirming the key role they play in facing increasingly complex societal challenges. It helps them to develop pragmatic solutions that are new and sustainable, and that integrate economic, social and environmental dimensions. It enables cities to share good practices and lessons learned with all professionals involved in urban policy throughout Europe. URBACT is 300 cities, 29 countries, and 5,000 active participants

www.urbact.eu/weed