



**Proequality**

EQUAL Transnational Cooperation

**Principles for the Successful Implementation of  
Equality Measures (Gender Mainstreaming and  
Diversity Management) into  
Enterprises/Organisations  
2007**

Austria.Germany.Poland.Portugal.Slovakia



**Pro  quality**

**EQUAL Transnational Cooperation**



# Principles for the Successful Implementation of Equality Measures (Gender Mainstreaming and Diversity Management) into Enterprises/Organisations

Austria



Germany



Poland



Portugal



Slovakia

CENTRUM  
RODOVÝCH  
ŠTÚDIÍ



# Editorial

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Participating countries: Austria, Germany, Poland, Portugal

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# 1 Introduction

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## 1.1 Context of the Cooperation

The promotion of equality between women and men is not only a task of each European Member State but also a mission of the European Union<sup>1</sup> specifically the domain of work and employment.

Despite the legal framework, both at national and European level, and years of effort to make gender equality a reality, the fact that men and women do not participate in either work and family life or decision-making processes in a balanced way means that gender equality is still far from being a reality in the daily lives of European citizens.

Even though equality between women and men has been benefiting from some new positive impulses, namely at European Union level, it is still necessary to act not only on the effect but mainly on the causes, in order to allow for a translation of the equality foreseen in the law into de facto equality.

Thus there is a need to integrate the gender dimension into policies and everyday practices of social and economic life in order to improve women's position in the labour market and men's position in family life and overcome gender discrimination. The implementation of gender mainstreaming and promotion of gender issues still remain a problem requiring direct and appropriate responses.

The achievement of these tasks requires the involvement of all agents and an action in numerous and various areas.

Within the framework of the EQUAL Community Initiative, several projects from **Austria** (*Qualitätsentwicklung Gender Mainstreaming*), **Germany** (*Berlin DiverCity*), **Poland** (Gender Index), **Portugal** (*Diálogo Social e Igualdade nas Empresas*) and **Slovakia** (*Centrum Rodových Stúdií pri Filozofickej Fakulte Univerzity Komenského*) have built up the Transnational Partnership Pro(E)quality in order to

fight and overcome gender discrimination and segregation in the labour market. It is intended to provide national and European actors with instruments that contribute for the structural change of the labour market in what concerns the gender equality, allowing action in different fields:

- to deal with barriers at company and institutional level
- to strengthen women labour market participation, horizontally and vertically
- to facilitate gender mainstreaming/gender diversity management in human resource management of companies and institutions
- to promote strategies concerning gender equality and improvement of women's situation in the labour market<sup>2</sup>

More than twenty organizations, such as non governmental organisations, companies, universities, associations, employers' representatives, trade unions, public sector institutions, involved in the several EQUAL projects that integrate the Transnational Partnership Pro(E)quality, contribute to a multi-sided approach to fight gender discrimination on the labour market in the participating countries.

The Transnational Partnership Pro(E)quality established four multinational working groups which worked on four different products which embrace different approaches, methods and solutions to fight gender discrimination on labour market and contribute to gender equality.

This brochure is the outcome of the work of one of the multinational working groups which was built up by professionals from ten different organisations that integrate the projects from Austria, Germany, Poland and Portugal.

The aim of this working group was to work on principles for a successful implementation of equality measures. With the coordination of one partner

<sup>1</sup>Treaty that creates the European Community – Art. 2, 3, 137, 141

<sup>2</sup>Defined in TCA – Transnational Cooperation Agreement

– Austria – the group worked together during one year and three months with the following methodology: working group meetings and sub-group work, discussions and exchange of information between meetings, using email as a communication tool to share the work among all.

Two working group meetings were held, where discussion about the subject took place, partners' different approaches and experiences on the subject were shared, a set of principles was worked out, decision about the content and structure of the brochure were made, the overall work was planned and responsibilities of each partner were settled.

## 1.2 Content and structure of the brochure

The promotion of equality between women and men is not only a task of each European Member State but also a mission of the European Union specifically the domain of work and employment.

This brochure is structured into four parts:

1. This Introduction where the presentation of the brochure is made, as well as an overview over the context in which this work had been developed.
2. Methodological and conceptual overview – In this part a methodological and conceptual approach to the intervention in companies/organisations is made and a set of principles which are considered necessary for the success of the process of equality measures implementation in companies and organisations are listed.
3. Case studies - Here a set of examples of equality measures and their process of implementation in concrete organisational environment which illustrate the use/application of the principles listed in the previous chapter is provided.

4. Appendix – The appendix presents the different projects and lists the organisations that contributed to this brochure in the frame of the Transnational Partnership Pro(E)quality.

### 1.2.1 Brochure Objectives

Taking into account the persistence of differences between the situation of men and women, working for and with companies for the promotion of gender equality has to be seen as a strategic factor for the change of some attitudes and some direct or indirect discriminatory practices against women in the labour market.

On the other hand, companies should start to look at gender equality not only as an issue of quality and competitiveness but also of economic growth and increasing human resources availability. Thus gender equality has to be seen and practiced as an issue integrated into the companies overall management principles.

With this work we aimed to build a useful tool for companies/organisations which are in a process of introducing equality measures in their organisational environment.

By defining a set of principles necessary for the successful introduction of equality measures, the fundamental steps in the process are pointed out and the basic quality criteria for the process is established.

By illustrating these principles, specific conditions, approaches and experiences about the process of introducing equality measures are shown. The demonstration of the potential effect of the application of these principles demonstrated in the examples presented may work as a way to encourage the change of attitudes and practices in companies/organisations.

## 1.2.2 How can the brochure be used and which is its Target Group

The core of this brochure is to highlight the principles for the successful introduction of equality measures and the illustrating examples. Here the reader can find information on what companies/organisations can do in order to develop a successful process.

The examples from specific companies in Austria, Germany, Poland and Portugal show a diversity of experiences, what can be done to achieve gender equality and the way this was/can be done. They also may support the reader in understanding the relevance of the principles.

This brochure is mainly addressed to companies, business management, human resources departments, consultants and experts and should be used during planning and implementation of equality measures.

## 1.3 Approaches to Quality Criteria for the Successful Implementation of Equality Measures

To work in a group which is both multinational and multi-agency requires an effort to reach a consensus that can incorporate and reflect all the different approaches on the subject.

The diversity of approaches resulting from the diversity of actors involved – different countries, different kind of organisations (*public sector, international agency, universities and research centres, associations, companies*), different types of intervention, different projects with specific aims – contributed to enrich the work and to give a multi-dimensional approach to the final product.

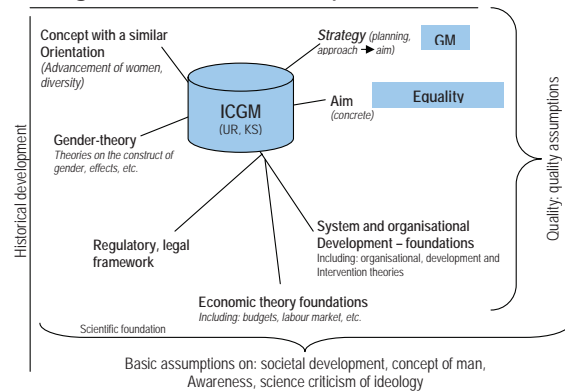
## 1.3.1 The approaches of each EQUAL project that integrate the Transnational Partnership Pro(E)quality

### 1.3.1.1 Austria – ARCO (Art of Consulting)

Gender Mainstreaming is considered a form of organisational development, which works on both the surface and the deep structure of an organisation. Gender Mainstreaming as a strategy needs explicit definitions of equality goals on both levels.

The approach that is used is the Integrated Concept Gender Mainstreaming, developed by the consultants Karl Schörghuber and Ursula Rosenbichler. This concept is based on a systemic approach to organisational development and on a strict separation of strategy and goals.

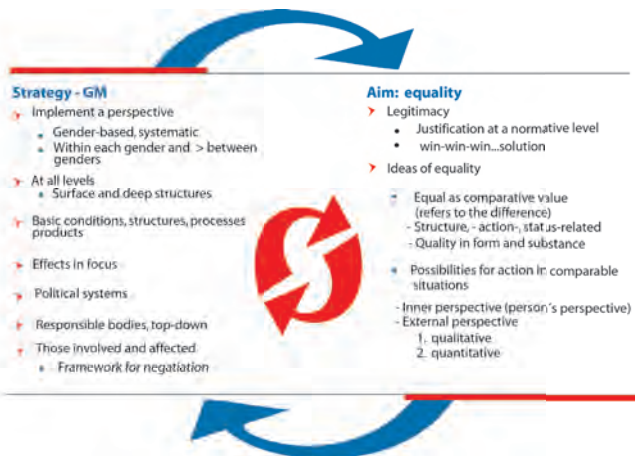
Gender Mainstreaming as a strategy has to be worked in the context of concepts with similar orientation and goals, with reference to gender-theories, on the basis of a specific regulatory, legal framework and economic foundations. It employs methods of organisational development.



The strategy of gender mainstreaming is the implementation of a perspective on all levels, on the background of certain basic conditions, structures, processes and products relevant in the organisation, political systems and responsible bodies.

The goal of gender mainstreaming can be based upon normative assumptions (*legal provisions*) and/or on ideas of equality developed within an organisation.





### 1.3.1.2 Germany – LebensWelt GmbH

Conditional upon the specific dimension of ethnic origin and an intercultural approach being implemented by LebensWelt, the orientation towards Diversity Management/Gender Mainstreaming is inherent in the organisation. Based on these aspects as well as on the current social and political needs (resulting, among others, from the German General Equal Treatment Act), LebensWelt is steering the belonging development processes. Hereby, Diversity Management/Gender Mainstreaming are seen as adequate strategies for these development processes.

The implementing processes within the organisation were based on quality management. Through specific trainings, for example on „Diversity Competence“, primary subject matters are dealt with.

#### 1.3.1.3 Germany – Deutsche Telekom

Diversity management describes all strategies and measures employed by the Deutsche Telekom Group to fully utilize the diversity of all stakeholders in order to contribute to the success of the Group and its value-oriented strategy on a sustained basis.

We embed diversity, open-mindedness and inclusion on a profound and comprehensive basis in all our business processes. In this way diversity contributes to our success as a global player. Through diversity management, we increase sales and pro-

ductivity and enhance shareholder value.

The fundamental changes to our business environment, in particular demographical and cultural changes, and new legal requirements, such as the EU Anti-Discrimination Directives and their respective implementation in EU countries, require our company's guiding principles and policies to be reviewed, adapted or extended.

At Deutsche Telekom the commitment to Equal opportunities (= *gender equality*) and diversity is an integral part of the corporate culture and the group's personnel management.

#### 1.3.1.4 Poland – EQUAL Project Gender Index

The Gender Index project focuses on promoting good gender practices in the workplace. Therefore it embraces mainly the problem of equality between man and women. Being the first EQUAL project within diversity mainstreaming strategy in Poland it was shaped to start discussion and increase awareness of Polish business and public institutions on gender discrimination's problem. Even though Polish labour law meets all EU requirements as to employees' equality, the common business practices are often contradictory to legal rules. This situation is caused by lack of knowledge of law, lack of understanding of the role of equal policies and possibilities of supporting and promoting women in the workplace. Having in mind those problems and the target group of the project, i.e. organizations, we try to challenge the traditional social role division between men and women at work. We do it by communicating both business and social importance of equal treatment, including promotion of organizations which can become raw models for developing good gender practices.

In our approach to gender mainstreaming we emphasise the positive effect of good gender policies on: employees' motivation and effectiveness, work environment and organizational culture, creativity and innovation, company's reputation and prestige, and its impact on reduction of financial costs (for example caused by employees' absence).

### *1.3.1.5 Portugal – EQUAL Project Social Dialogue and Equality within Enterprises*

The promotion of gender equality within companies is faced by the EQUAL Project Social Dialogue and Equality within Enterprises as a main pathway to accomplish what is required by the national and community legal framework, as well as a way to promote the empowerment and citizenship of every woman and man.

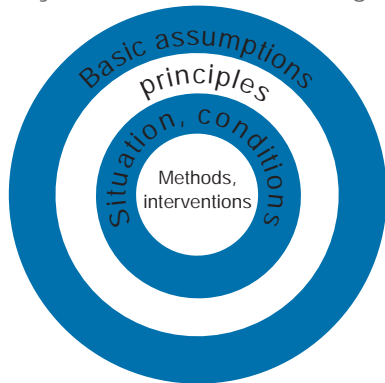
The implementation of gender equality measures is seen as an adequate strategy to achieve gender equality in companies. Our approach on this subject is a transversal one, comprising the complementary points of view of the different partners involved in the project (*public organisations, social partners, universities and research centres as well as civil society organisations - see appendix*). A core element in this approach is the interactive communication involving all the stakeholders in order to improve the companies' practices and policies in this field and ensure their sustainability.

# 2 Introducing equality measures – 10 basic principles

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## 2.1 Circle of Gender Diversity Management

(developed by: Rosenbichler / Schörghuber 2005)



The circles represent the different levels of focus in the process of introducing equality measures by means of Gender Mainstreaming or Diversity Management. The idea is that equality measures can be introduced successfully into an organisation only if each of the levels represented by the different circles is carefully considered. E.g. methods and interventions are located in the centre and can only be planned appropriately when the areas represented by the outer circles have been taken into account.

In this brochure the focus lies on the level of principles – located in the second circle from the outside. During the cooperation the group of experts worked out a set of principles which are considered necessary for the successful introduction of equality measures. Before these principles are introduced in detail we want to give a short overview over the context in which these principles are embedded.

### 2.1.1 Description of the circles

#### 2.1.1.1 Basic assumptions

This circle refers to the assumptions which make up what is referred to as an organisations' culture. Assumptions are generally located on the level of „deep structure“ – meaning they are not directly visible in an organisations' everyday procedures, however they play a significant role in guiding peoples' actions. These deep structures, many times are rooted in values and prejudices that work as barriers to the implementation of equality and diversity policies in the organisations.

These assumptions have to do with:

- ideas about people and the way they learn and act
- ideas on gender
- ideas on society and social development
- theories of knowledge and science
- theories on how organisations work and develop

#### 2.1.1.2 Principles – Connection between basic assumptions and specific situations

The central question is: How are certain assumptions worked and transferred into action in specific situations? For this transfer principles are necessary tools which help to systematize the development and the implementation of activities and put them on a theoretically sound basis. In order to reach the gender equality and diversity these principles have to be able to counteract assumptions that can work as barriers to the implementation of equality and diversity measures and contribute to foster equality and diversity friendly assumptions.

Ten main principles are defined in more detail below.

### *2.1.1.3 Situation, framework (commissioned tasks, objectives ...)*

This circle refers to the specific context in which an equality measure is to be developed and introduced:

- The framework and the objectives of the commissioned tasks
- The definition of the area/part of the system in which the measure is to be implemented
- Responsibilities relevant to the task
- Competences of people and organisations involved (*Consultants, participants, the organisation as a whole*)
- Elements of the system (*e.g. the field of Knowledge Management in the organisation*)

### *2.1.1.4 General methodological procedures*

Identification of main areas of attention and levels of activities in which change should be brought about:

- Organisation at large (*from the structural to the cultural level*)
- Groups and teams
- Procedures and structures on the level of projects
- Perceptions of individuals and organisations
- An organisation's environment
- Clarification of functions

### *2.1.1.5 Methods*

- Selection of methods
- Diagnostic analysis of organisation
- Diagnosis/evaluation of processes
- Definition of areas of interventions
- Definition of management techniques
- Definition of measures
- Qualitative analysis on the language used in company's documents
- Implementation of transversal communication and dialogue processes

## **2.2 The 10 principles**

### **2.2.1 Awareness and analysis of starting point**

According to the starting point different types of measures will prove useful. They can range from awareness raising measures to systematic implementation of equality.

The following aspects need to be taken into account:

- Conditions in society
- Legal situation
- Interests involved
- Objectives

### **2.2.2 Diversity Management/Gender Mainstreaming is not a project/product but a transversal issue, integrated in the policy of an organization, engaging all stakeholders**

Equality objectives have to match and be an integral part of an organisations' basic policy.

### **2.2.3 Methods and tools of organizational development should be used**

Quality management systems, project management, evaluation, reporting and feedback systems... are ideal tools for introducing equality measures.

### **2.2.4 The main focus of Gender Mainstreaming and Diversity Management is on structures and systems not on individual attitudes**

Gender Mainstreaming and Diversity Management are strategies of organizational development. The goal is the change of structures not primarily the change of individual attitudes.

### **2.2.5 Attention needs to be paid to the side effects of a specific approach in a broader system**

When strategies are planned accompanying measures need to be developed to prevent and counteract unintended side-effects (*e.g. re-stereotyping*). Measures have to be reflected whether they increase the possibilities for the people concerned or whether they actually narrow their possibilities (*e.g. defining a measure to facilitate part-time work as woman-friendly would be a case of re-stereotyping. It would convey the idea that women generally prefer part time work and at the same time make it difficult for men to apply for part-time work, thus narrowing possibilities for both sexes instead of providing broader possibilities*).

### **2.2.6 The underlying reason for introducing Gender Mainstreaming and Diversity Management needs to be transparent – arguments need to be carefully developed.**

These arguments can be located on a normative level (*values, justice*) and or on the level of economic considerations.

### ***2.2.7 Objectives in relation to gender equality need to be specified and negotiated***

In each organizational context equality objectives need to be negotiated with the relevant actors. A process for dialogue and transparent negotiations has to be created.

### ***2.2.8 Gender specific perspectives and measures are not always a way to equality***

Differences (*man – woman; migrant – non-migrant; young – old ...*) should only be introduced (*e.g. as a starting point for positive action*) if they are of significance and serve as an initiation of constructive developments. Making these differences per se mostly causes re-stereotyping.

### ***2.2.9 Key players need to have the competence to think about the categories of gender/justice as related to organizational development***

The level of this competence will affect quality of objectives and the sustainability of the implemented measures.

### ***2.2.10 Gender Mainstreaming and Diversity Management have to be based on a top down and bottom up approach***

Interactive communication and empowerment of all the stakeholders are essential.

# 3 Case studies

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## 3.1 Austria - Introducing equality measures into a sports association

Karl Schörghuber – ARCO (*Art of Consulting*)  
Veronika Weisskircher – abz\*austria

### 3.1.1 Framework of the project

The project was carried out in a sports association, which is constituted by members and which offers services to the public. The consultation process was contracted on the initiative of a new, dedicated leader. The objectives were to

- modernise the organisation's public appearance, which included introducing Gender Mainstreaming and Diversity Management measures
- prepare the organisation for a situation in which the eligibility for public funds would depend on the implementation of Gender Mainstreaming and an equality oriented organisation design.

The project had a duration of 1,5 years.

### 3.1.2 General objectives of the project and objectives concerning equality

In the first phase objectives were set on a general level. It became clear that these objectives would need to be continuously revised, developed and negotiated.

The original objectives were:

- Extension of the organisation's membership base and an increase of the number

of clients who were making use of the association's services. This objective was to be reached through:

- \* Addressing new groups of the population
  - \* Modernising the appearance of the organisation towards equality.
- Carrying out new innovative projects and developing the organisation in the direction of making it possible also for less privileged groups to have access to sports and socialising activities offered by the organisation. This was to be reached through
    - \* Access to public funds which are connected with equality measures (*Gender Mainstreaming and Diversity Management*)
    - \* Development of an open culture of the organisation

In the course of the project another objective was added:

- Reducing role stereotypes connected with different groups of the population. This was to be reached through Internal and external communication measures.

### 3.1.3 Survey of actions planned

#### 3.1.3.1 Which were the leading principles underlying these actions and procedures?

- Gender Mainstreaming and Diversity Management were seen as a form of organisational development and not as isolated measures
- The main focus of GM and DM is on structures and systems not on individual attitudes – in this sense the focus in this consultation process was on communication patterns



and not on individuals

- The gender specific perspective is not always a way to equality – which meant that gender and diversity were not considered as primary differences but were introduced as differences only in case constructive developments could be initiated
- Creating a process for dialogue to define equality is essential. Therefore equality oriented communication and organizational patterns were negotiated on a broad basis.
- Methods and tools of organizational development should be used. Constant feedback loops are necessary (*objectives – definition of measures – evaluation -*)

### *3.1.3.2 Description of methodological principles of the implementation (e.g. Diagnosis, Definition of areas of intervention, Definition of measures, Evaluation and feedback)*

- The procedure was oriented on the classic way of organisational development
- An architecture of intervention and measures was developed

### *3.1.3.3 Description of undertaken actions*

- Organisational development: Different committees for
  - \* the different phases of the objective oriented procedure
  - \* for the different organisational fields and fields of work
- Personnel development of trainers and the department leaders
- Bringing about structural change in the fields of:
  - \* Public relations
  - \* Event management
  - \* Improvement of infrastructure

## **3.1.4 Implementation: Survey over success and difficulties/problems in the process of implementation**

### *3.1.4.1 Difficulties*

- It proved difficult to reach and involve all responsible people and all agents relevant for bringing about change.
- The meaningfulness of the measures needed to be confirmed again and again
- A lot of members could not be directly reached and were therefore not as involved in the process of decision making towards change. They therefore had greater difficulties in understanding the necessity of the changes that were brought about.
- Costs: The costs for external consultation are very high. It's not always possible to translate these costs into a direct increase of effectivity and efficiency.

### *3.1.4.2 Success*

- A lot of topics and a lot of areas of the organisation could be developed in addition to the equality measures in the strict sense.
- Increased flexibility of communication structures, functions and tasks towards greater equality
- A clear path towards reaching the objectives became visible

### *3.1.4.3 Which consequences can be drawn as far as the formulation (phrasing) of the underlying principles is concerned?*

The principles were confirmed. No changes are necessary.



*3.1.4.2 Which consequences can be drawn as far as application of the underlying principles is concerned. (lessons learned in the process of implementation as far as the underlying principles are concerned)?*

Systemic, constructivist procedures facilitate development and change, but only when objectives have been clearly defined and the principles of work have been clearly communicated.

## 3.2 Germany – Diversity Management within the Deutsche Telekom Group

Jutta Wehage – Deutsche Telekom  
Sabine Klenz – Deutsche Telekom

### 3.2.1 Framework of the project

Modern diversity management has been developed over many years. In 1989 the first representative for women was appointed by Deutsche Telekom. While to begin with the focus remained on the advancement of women and equal opportunities, the approach gradually developed into a comprehensive diversity management scheme. In March 2004, the first steps were taken in the implementation of diversity. As of 2006, the Group's diversity strategy has served as a framework to further develop corporate culture and processes in a systematic way.

The implementation of Diversity is aligned with our corporate goals, objectives and strategies. In order to integrate diversity in day-to-day working life and in Deutsche Telekom's business models on a sustainable basis, the relevant issues and principles are profoundly embedded in our structures and processes.

Management, executives and other people involved invest time and possibly other operational resources in implementing Diversity. They cannot be quantified directly for the most part, however, they impact the fulfilment of other responsibilities.

A group of 14 people build today the department of Diversity. They are connected with the different units inside the Deutsche Telekom Group.

### 3.2.2 General objectives of the projects and objectives concerning equality

At Deutsche Telekom the commitment to Equal opportunities (= *gender equality*) and diversity is an

integral part of the corporate culture and the group's human resources strategy:

- In 1989 the first Equal Opportunities Manager was appointed
- In 1992 a policy for the advancement of women was adopted by the Board
- Collective agreement (2000) and group works agreement (2001) on equality and equal opportunities are measures of unprecedented magnitude for a German Company
- In 2004, the Diversity Policy was adopted by the Board

As the leading services company in the telecommunications and information technology industry, we network society for a better future. With top quality, efficiency and innovation, to the benefit of our customers. In every respect.

As a global player in various business segments that unites different corporate cultures under one roof, diversity and a respectful way of thinking and acting are the keys to our success.

The values of our company and brand demand that the individual, personal differences of all our stakeholders (*shareholders, customers, employees, suppliers*) be recognized, valued, included and utilized.

The fundamental changes to our business environment, in particular demographical and cultural changes, and new legal requirements, such as the EU Anti-Discrimination Directives and their respective implementation in EU countries, require our company's guiding principles and policies to be reviewed, adapted or extended.

We view this as an opportunity

- to process diverse market segments to the best of our ability in the future,
- to efficiently leverage the diverse potential of our employees and teams, and
- to create an environment that encourages innovation on a sustained basis.

We encourage and demand personal and cultural diversity for a superior quality of life and work in a world of internationalization and globalization.

Group Headquarters is responsible for supporting all Group units and providing advice and support on the implementation of Diversity, including:

- Definition of diversity goals based on corporate objectives on Group and business area level
- Implementation support through central strategies, concepts and projects
- Determination of structural data, updated on an annual basis, to evaluate progress on Diversity
- Preparation of the annual Group diversity report

Personal commitment

The participation of all those involved is needed to bring about change and improvement to the benefit of the company and its employees:

- Through their function as role models and multipliers, the board members and managers in the Group have particular responsibility for the implementation of Diversity by exemplifying diversity tolerance, inclusion and diversity management and encouraging and rewarding commitment in these areas.
- Employees at all levels in all Group units – in Germany and abroad – make diversity part of their working lives.

The Diversity Policy symbolizes the implementation of a comprehensive and holistic diversity management within the Deutsche Telekom Group. This Policy does not constitute any legal claims or obligations.

### 3.2.3 Survey of actions planned

#### 3.2.3.1 Which were the leading principles underlying these actions and procedures?

- **The underlying reason for introducing GM and DM needs to be transparent – arguments need to be carefully developed:**  
Our Diversity concept is a management approach pursuing the objective of sustainability contributing to the financial success of the Deutsche Telekom Group by recognizing, valuing, including and utilizing the individual diversity of our stakeholders.
- **Diversity Management is not a project/product but a transversal issue, integrated in the policy of an organization, engaging all stakeholders:**  
The implementation of Diversity is aligned with our corporate goals, objectives and strategies. In order to integrate diversity in day-to-day working life and in Deutsche Telekom's business models on a sustainable basis, the relevant issues and principles are profoundly embedded in our structures and processes.
- **Awareness and analysis of starting point:**  
As a global player, Deutsche Telekom is faced with various regional and national conditions and customs. Individual parts of the Diversity Policy may conflict with local legislation, prohibitions or cultural conditions. In such cases, the Deutsche Telekom Group takes every effort to ensure that any possible discrimination in the respective environment is, at least, not perpetuated within the Group. Whenever possible and in the interest of Deutsche Telekom, we also uphold our values and convictions vis-à-vis external stakeholders.
- **DM is to be based on a top down and bottom-up approach:**  
Through their function as role models and multipliers, the board members and managers in the Group have particular responsibility for

the implementation of Diversity by exemplifying diversity tolerance, inclusion and diversity management and encouraging and rewarding commitment in these areas.

Deutsche Telekom employees at all levels in all Group – in Germany and abroad – make diversity part of their working lives and are given the opportunity to take an active role in deciding how diversity is to be implemented in the company (*e.g. employees networks; Diversity Award = best-practice examples of successfully implemented Diversity measures*).

### 3.2.3.2 Description of methodological principles of the implementation

#### Recognition of diversity

Diversity describes the individuality of people. It is characterized by core dimensions that lead to differences and similarities. In many of the countries in which our Group operates, these core dimensions – gender, age, disability, ethnic origin & race, religion and sexual orientation – are highly significant from an economic, demographic, legal and/or cultural perspective. The Deutsche Telekom Group recognizes the special bearing of these dimensions and takes them into consideration when implementing the overall Diversity concept. Other dimensions, which are important in relation to the specific background and situation of our Group and business areas, are additionally taken into account depending on the context. These may include: education, parenthood, marital status, culture, language, length of service with the company, way of thinking or working.

We consciously recognize the diversity of our employees, markets, suppliers, shareholders and the society we live in. We encourage this diversity by taking a proactive approach to our business environments. This way we create and foster connections that allow us to take full advantage of all opportunities and potential.

#### Valuing Diversity through Open-mindedness

Open-mindedness describes the basic attitude with which we approach the individuality of others. Complete respect for different personalities, skills and perspectives is a basic prerequisite for productive cooperation and the enrichment of our daily working lives.

We create an open and respectful corporate culture in which individuals are given scope for their ideas and needs. This way we recognize and respect our stakeholders. We encourage the loyalty of everyone and ensure existing and new perspectives and potential are fully utilized.

#### Inclusion of all stakeholders

Inclusion describes the behaviour we take to consciously involve diverse people in our working and decision-making processes. Dealing with all stakeholders in an unreserved, open and sensitive way is a basic requirement for the optimum use of all business potential.

We make our stakeholders diverse offers and actively include them in our processes. This way we meet the requirements of our customers while at the same time encouraging our employees to contribute their individual abilities in an innovative and productive manner. We thus ensure that all available resources and market opportunities are used as effectively as possible.

#### Utilization of diversity through consistent diversity management

Diversity management describes all strategies and measures employed by the Deutsche Telekom Group to fully utilize the diversity of all stakeholders in order to contribute to the success of the Group and its value-oriented strategy on a sustained basis.

We embed diversity, open-mindedness and inclusion on a profound and comprehensive basis in all our business processes. In this way diversity contributes to our success as a global player. Through diversity management, we increase sales and productivity and enhance shareholder value.

#### Legal requirements

Deutsche Telekom has committed itself not to toler-

ate any form of direct or indirect discrimination or harassment.

Therefore, all staff – managers and employees – must refrain from engaging in any behaviour that could have a discriminatory and/or harassing effect on others. Failure to comply with this rule may lead to action being taken under the provisions of labour legislation or, in the case of civil servants, disciplinary proceedings being initiated.

As a global player, Deutsche Telekom is faced with various regional and national conditions and customs. Individual parts of the Diversity Policy may conflict with local legislation, prohibitions or cultural conditions. In such cases, the Deutsche Telekom Group takes every effort to ensure that any possible discrimination in the respective environment is, at least, not perpetuated within the Group. Whenever possible and in the interest of Deutsche Telekom, we also uphold our values and convictions vis-à-vis external stakeholders.

### *3.2.3.3 Description of undertaken actions Recognition of diversity*

Group Headquarters is responsible for supporting all Group units and providing advice and support on the implementation of Diversity, including:

- Definition of diversity goals based on corporate objectives on Group and business area level
- Implementation support through central strategies, concepts and projects
- Determination of structural data, updated on an annual basis, to evaluate progress on Diversity
- Preparation of the annual Group diversity report
- Formation of national and international cross-divisional diversity councils
- Creation of a “Diversity Management” organizational unit

All group units within the Deutsche Telekom Group, in Germany and abroad, are responsible for imple-

menting Diversity in their respective organizations:

- Definition of diversity goals based on the business objectives of their organization and those of the Group
- Appointment of diversity commissioners
- Preparation of an analysis of the actual situation with regard to Diversity, taking the six core dimensions into consideration and using quantitative and/or qualitative data; results to be included in the analysis at Group level
- Pursuance of an ongoing process of change and improvement through Diversity using analyses, targets, strategies and action plans
- Exchange of “best practices” in the Group
- Annual diversity analysis
- Updating of diversity objectives
- Formation of “diversity teams” and/or “diversity councils” in/on which managers from different functional areas are involved or participate.

### *3.2.4 Implementation: Survey over success and difficulties/problems in the process of implementation*

#### *3.2.4.1 Success*

#### **Example: Diversity Award**

The Diversity Award was developed from the prize for equal opportunities and has been awarded regularly since 1994 always under the patronage of a member of the Board or under the patronage of a member of the political life (*e.g. minister of family*) Teams, individuals, organizational units, entire departments or project groups inside Deutsche Telekom can take part in the Award.

Completed and ongoing projects may compete for it: On the one hand, the award is aimed towards conventional projects, which have been set up for



a limited period of time. On the other hand, working groups, pairs or individuals can participate if they have developed new approaches, strategies or measures in their day-to-day work, which are worthy of the award due to their relevance to diversity and the award slogan.

The aim is to evaluate as many exciting and innovative projects as possible, which will then serve as best practices for the entire Group. A jury will select the winner from among the best projects submitted.

The award ceremony is to be held at the Deutsche Telekom Group headquarters in Bonn. A marketplace is usually set up to allow the finalists to present their projects.

We are particularly delighted with the diversity of the entries themselves – as well as submissions from a number of units across Germany, there are also several projects from Deutsche Telekom's international units. The quality of submissions proves that our Group's claim of establishing a link between people has a tangible significance for our employees.

The projects illustrate a wide range of commitments made by organizational units at the Deutsche Telekom Group in order to implement diversity, e.g.

- Job and family audits;
- Part-time training in the Vocational training
- Intranet platforms with information about Diversity
- A black women owned IT company;
- A Diversity film club;
- An internet portal for people with disabilities;
- Internal culture cafés;
- Technology in day care centre;
- Ethno-Flyer
- Gender competent marketing
- Mentoring programs
- Girls Day activities
- Diversity information and promotion

- ..... and a lot of more projects

Also other activities are showing how Diversity is a topic in the company:

- Diversity workshops
- Gender trainings
- Events: Diversity Kick off, Congress, Award
- Xans Netz
- Work&life balance products
- Member in Networks (e.g. Conference Board; Global Summit of women; EWMD), Forum for Women in Industry
- ..... and a lot of more

Recommendations (e.g. the BAGSO consumer recommendation; BAGSO = Bundesarbeitsgemeinschaft der Senioren-Organisationen e.V., the German national association of senior citizens organizations) Audits (audit berufundfamilie® (Job and family audit) of the Hertie Stiftung/donation)

Awards (Employers Award; Erfolgsfaktor Familie 2005 = The Family as a Success Factor 2005)

and invitations of companies, organisations and others to present "Diversity at Deutsche Telekom" are underlining the success of the implementation of Diversity.

Deutsche Telekom is one of the founder of the "Charta der Vielfalt" in Germany.

### 3.2.4.2 Give attention

In a period of cultural change (up to ten years), the benefits of diversity that can be attained are estimated at ten percent of a company's value added (in terms of revenue and productivity). The direct costs constitute a fraction of this amount. Diversity therefore makes good business sense from an operational and strategic viewpoint.

General risks inherent in changes. Each change in a company is associated with risks. Fears, a lack of understanding or other forms of resistance can

arise among all those involved, causing friction and unrest in the company.

Diversity is not the answer to all challenges, but a positive contribution towards sustained success.

### *3.2.4.3 Which consequences can be drawn as far as the formulation (phrasing) of the underlying principles is concerned?*

People have different needs and live in different circumstances: A written policy has to be clear enough for the goals of the company to be generally binding for all in the Group, but it also has to be open enough to offer leeway to take into consideration the needs and circumstances of an individual unit, for example a branch office.

### *3.2.4.4 Which consequences can be drawn as far as application of the underlying principles is concerned. (lessons learned in the process of implementation as far as the underlying principles are concerned)*

We are still in the process of implementation, but until now we see how important the “top down and bottom up approach is” and that e.g. measures like trainings or a Diversity Award enable the different people of a unit, to learn a lot about Diversity and which advantages and achievements associated with it.

## 3.3 Germany – Diversity Management in the organisation LebensWelt

Hartmut Davin - LebensWelt  
Irina Meyer – Frauen Computer Zentrum Berlin/  
Translation

### 3.3.1 Framework of the process

#### 3.3.1.1 The organisation LebensWelt GmbH

Prior to describing the work of „LebensWelt“, it should be pointed out that the main focus is on the internal organisational development of an independent social work institution. Based on certified Quality Management (*EN ISO 9001:2000*), the organisational development is intended to be continuously improved. Moreover, it must be stressed that a process is described here, which is not comparable with projects starting at a certain point and ending after completing all project phases.

LebensWelt gGmbH is an independent youth welfare service agency operating in an intercultural context. Within the EQUAL development partnership „Berlin DiverCity“, Lebenswelt cooperates with the organisation „Eine Welt der Vielfalt Berlin e.V.“ (*A World of Difference, Berlin Association*).

Main target groups of social work according to the national child and youth welfare legislation (*„Hilfen zur Erziehung Sozialgesetzbuch SGB VIII“*) are families and young adults both with national and migrant background.

„Within an intercultural context, people’s individual migration histories as well as their cultural imprints and affiliations are appreciated. At the same time, they are not evaluated according to one’s own viewpoints and measures. It is presumed that each human being is able to even create new affiliations and perceptions.“

LebensWelt gGmbH Berlin, Obentrautstr. 72, 10963

Berlin, externes QMH 2006, Leitbild;  
[www.lebenswelt-berlin.de](http://www.lebenswelt-berlin.de)

#### 3.3.1.2 Diversity Management – Ethnic origin as a specific dimension

LebensWelt particularly focuses on the specific dimension of ethnicity, following the strategy of „managing diversity“, with particular regard to

- the situation of the clients in an intercultural context,
- the situation of the staff in an intercultural context and
- the interdependencies between clients, costumers and the organisation LebensWelt in the context of Diversity Management.

The objectives of the work of LebensWelt are in line with article 1 of the German General Equal Treatment Act (*Allgemeines Gleichbehandlungsgesetz-AGG*) which came into force in August 2006.

“This Act aims at the prevention and elimination of discrimination on such grounds as race or ethnic origin, sex, religion or belief, disability, age or sexual identity”.

In the following, selected examples will serve to illustrate how LebensWelt works with the method of „Quality Management“, in order to tackle complex processes within diversity management (*specific dimension of ethnic origin*).

### 3.3.2 General objectives concerning (e-)quality of the process – Learning organisation „LebensWelt gemeinnützige Gesellschaft für interkulturelle Jugendhilfe mbH“ („Lebenswelt - non profit organisa-



## tion for intercultural youth support")

Whilst continuously improving both the organisation itself and the services offered by the organisation, the initial approach to „support young people in an intercultural context“ will be permanently further developed too. Among others, cooperation is an important strategy, as for example with “Eine Welt der Vielfalt” within the EQUAL DP “Berlin DiverCity”. Moreover, various methods are applied, such as quality management or further training.

sity management with a particular focus on the specific dimension of „ethnic origin“ and the transverse dimension of sex and age.

### 3.3.3 Survey of actions planned

#### 3.3.3.1 Selected principles underlying these actions and procedures

**Awareness and analysis of starting point** (example: legal situation)

Through the amendment of § 78 SGB VIII (*National Child and Youth Welfare Act*) in 1996, the necessity to prove quality development and assurance within child and youth welfare services was legally fixed (*legal starting point*).

1999 Lebenswelt	Decision for QMS – Specific dimension ethnic origin	Beginning and first steps 2 colleagues preparing the process of certification •Quality-Circle •Team of Coordinators •2 Quality Appointees
May 2003	Certification	EN ISO 9001:2000
July 2003	Administrative Position	1 Quality Appointee
June 2006	Re-Certification	Well established / best practice QMS • Quality-Circle • Quality Appointee
September 2006	„Berlin DiverCity“	Project Cooperation
December 2006	One-day training “Diversity Competence Part I	• Eine Welt der Vielfalt Berlin e.V./ LebensWelt gGmbH • 10 members of staff of LebensWelt gGmbH
planned: September 2007	Two-day training “Diversity Competence Part II”	extern lecturers / around 18 members of staff of LebensWelt gGmbH • AGG - German General Equal Treatment Act ( <i>core dimension</i> ) • Sex and age ( <i>transverse dimension</i> ) • Ethnic origin ( <i>specific dimension</i> )

Overview: Targeted objective „Diversity Management“

The development process is targeted at continuous diver-

LebensWelt was founded in 1999 in Berlin-Charlottenburg as a civil law association. In 2001, it was transformed into a private limited company and since 2004, „LebensWelt gemeinnützige Gesellschaft für interkulturelle Jugendhilfe mbH“ is operating as a non-profit organisation. From the very beginning, the quality management system QMS (*EN ISO 9001:2000*) was introduced. In May 2003, the respective certificate was attained. This very work intensive process was accomplished by two colleagues.

The developing process of the organisation of

„LebensWelt gGmbH“ was based, among others, on:

- The legal base provided by SGB VIII (*fringe condition of quality*)
- Decision by supreme managing authority (*Top down*)
- Provision of resources (*2 people*)
- Establishment of a working group dedicated to quality aspects ("*Quality Circle*") (*professional advice*)

Subsequent to the certification, in June 2003 the administrative position of a „Quality Appointee“ was established.

Methods and tools of organizational development (*Quality Management System EN ISO 9001:2000*)  
The Method of „Quality Management“ (*EN ISO 9001:2000*) enables positive aim guidance for the learning organisation LebensWelt gGmbH.

The dimension of ethnic origin was given specific attention for the development and production of forms and proceeding guidelines. As they are key figures at the medium level, the coordinators played an important role in the knowledge and information dissemination process as regards intercultural social youth work.

The certification not least served as a base for a successful implementation of provisions at the professional level (§§ 29,30,31,35 SGB VIII) and at the specific (*ethnic origin*) level. Consequently, the service provision of intercultural social youth work is an offer with a specific profile on the one hand, being accepted at an intern level as bottom up process on the other hand.

In addition, the transverse dimensions of „sex and age“, as well as the other core dimensions as they are contained in the German General Equal

Quality Management System QMS	Prototype	Key players	Appreciated result
Supreme managing authority	Working Group „Quality-Circle“	Medium Level	Certificate
Role model	“Exemplary Learning”	Team of coordinators	Positive reputation of the Organisation
Top down	“Learning Organisation”	Multiplier	Bottom up

Treatment Act (AGG) „sexual identity, religion, belief, disability or race“, are part of the development process.

Implementation and improvement

The two founders and the directors of LebensWelt were both born in Turkey. When they were young adults, they moved to Germany. They have worked for many years in the social youth work area.

Due to the legal standard to conclude quality agreements between service providers and sponsors, it became necessary for LebensWelt to prove its quality. For this, the application and certification of the quality management system QMS was shown as being the most suitable.

In the context of a specific working group dealing with quality ("*Quality Circle*"), among others, the method of "Exemplary learning" was developed and demonstrated.

are based, among others, on

- Quality management system with respectively belonging quality policy
- Management of resources of staff with both intercultural and language competencies for case work
- Awareness for quality (*Bottom up*)

### **3.3.4 Implementation: Survey over success and difficulties/problems in the process of implementation**

- The promotion of communication of , key-players' for complex processes.

#### *3.3.4.1 Some consequences as far as the formulation of the underlying principles is concerned*

To combine the initial organisation with a quality management system (*awareness of starting point*) proved to be a successful strategy. In the context of the organisational development, the orientation of the involved staff was another important point. For example, the Quality Appointee organises specific further trainings as methods and tools of organisational development. It was experienced so far, that both aspects:

- Quality Management (*EN ISO 9001-2000*) and
- Trainings dedicated to the development of diversity competence (*specific, transversal and core dimension*)

are highly effective means and therefore could be established as methodical principles for a continuous organisational development.

#### *3.3.4.2 Some consequences as far as application of the underlying principles is concerned*

Within all phases of constitution, certification and implementation, 'critical' lapses have shown up. Particular attention needs to be given to key persons responsible for quality-/change-management tasks in order to meet the requirements of complex processes and to avoid to personally address the inherent conflicts. The main focus is on

- The ,protective responsibilities of supreme managing authority' for change management staff
- The careful and accurate recruitment of , change-agents' and

## 3.4 Poland – Volkswagen Motor Polska

Beata Balinska  
Malgorzata Ciesielska  
Paulina Kaczmarek  
Marta Rawluszko

### 3.4.1 Framework of the project

The project was carried out in Volkswagen Motor Polska Sp. z o.o. in Polkowice, Poland, which is a motor company employing 68 women and 1005 men. The project is entitled „Future Mum Programme”.

It was Ms. Joanna Kaniewska, HR Director of Volkswagen Motor Poland who initiated the project. The document describing the conditions of participation in the programme was developed and distributed via e-mail among all employees.

The programme has initially been treated as pilot and innovative solution and as such was constantly monitored. After a year of the new regulations being in place, the HR Department decided to go on with the project and place it within standard solutions offered to pregnant women in the company.

### 3.4.2 General objectives of the projects and objectives concerning equality

The company wants to be woman-friendly. Caring about the well-being of pregnant women and wishing to ensure them maximum comfort, the employer decided that the employees may, if they decide to apply for that, benefit from flexible working hours during pregnancy.

Thanks to better work conditions, future mums will be more motivated and loyal to the company. No employer can afford to lose good, qualified employees. Implemented solutions will also contribute to better organization of work and reduced costs (*no*

*paid overtime, no replacements*). The increased level of work satisfaction among pregnant employees means also more effective work because they can decide on work hours individually.

### 3.4.3 Survey of actions planned

#### 3.4.3.1 Which were the leading principles underlying these actions and procedures?

The case study refers to the following principles:

- Awareness and analysis of starting point
- Equality measures integrated in the policy of an organisation, and engaging all stakeholders
- Objectives in relation to gender equality specified and negotiated
- Equality measures based on a top down and bottom up approach – interactive communication is essential

The idea of the programme came from multiple conversations with women who expressed their needs, expectations and concern. The employer, understanding the exceptional situation of pregnant women but at the same time not willing to lose valuable employees in the first months of the pregnancy, has decided to create the regulations that would satisfy both sides. Business analysis made internally by the company showed that there was certain loss made by the fact that women left the company early in the first months of their pregnancy because of medical reasons. As a problem of “false” sick leaves taken during the whole time of pregnancy is well known and quite often met in Polish companies, Volkswagen Motor Polska Sp.z.o.o. in Polkowice thought about counteracting this phenomenon and seeking solutions in favour of pregnant women’s retention.

A draft of Future Mum Programme was presented by HR department to all stakeholders involved: top

management, women employees gather in an internal women network called Women's Club VW, as well as trade unions (*the project was officially signed by the company and trade union*). All activities aimed at facilitating women's professional engagement, in this case pregnant women, were fully accepted by the company's management. It is worth underlining that the programme was initiated by the top management representative, however, it was consulted with women employees in the company and found their enthusiastic support.

As replying to overall management principles, the project was integrated into regular HR policy i.e. creating friendly and flexible workplaces and meeting employees' expectations towards workplace organization.

#### *3.4.3.2 Description of methodological principles of the implementation (e.g. Diagnosis, Definition of areas of intervention, Definition of measures, Evaluation and feedback)*

Future Mum Programme started from a simple observation about pregnant women leaving the company in early months of their pregnancy because of medical reasons. As Polish companies quite often have to face up this problem, there is a common understanding of it in the society. It is widely acknowledged that pregnant women take "false" sick leaves as soon as they know about pregnancy. It is because they don't trust or they fear the employer, or they treat staying home as the only option for pregnancy. As women employees in Volkswagen Motor Polska Sp. z o.o. in Polkowice constitute a relatively small group of young women in their reproductive age and cases of pregnancy were quite common, HR Department did not have to use any specific tools of analysis to make the diagnosis of the problem and define the areas of intervention. The business case was also quite evident for the company. In Volkswagen Motor Polska Sp. z o.o. in Polkowice women hold mainly

the positions of higher specialist and their temporary replacement always constituted a costly and time-consuming effort for the management.

After consulting the programme with the stakeholders within the company, the implementation of the programme started in March 2006. As the one year pilot phase came to the end, statistics concerning the programme were provided by HR Department. In the period between 1st March 2006 and 28th February 2007 there were 10 women getting pregnant in the company. 7 of them showed interest in profiting from the Future Mum Programme and eventually 6 of them took part in it, using flexible arrangements. All women involved in the programme expressed high satisfaction and gave their positive opinions. The HR Department took the decision to make the programme a regular solution offered to pregnant employees. It is worth noting that Future Mum makes a part of a wider company philosophy focused on creating flexible workplaces in order to answer employees' needs (not restricted to pregnant women only but concerning the whole group of posts where flexibility is possible according to employees' terms of reference). Future Mum Programme also inspired HR Department and company management to propose more initiatives concerning work/life balance targeted on women, as well as men employees.

#### *3.4.3.3 Description of undertaken actions*

To participate in the programme, the female employees should inform their supervisors that they are pregnant, as well as present the appropriate medical certificate. Women employees are proposed to take a profit from following arrangements:

- Flexible working hours per day according to employee's needs (*6,5 to 8 hours*)
- Flexible working hours according to schedule (*start/end of working day*)
- The employee can collect additional hours (*hours worked oved 6,5h working day*) on an in-

dividual working hours account

- Additional hours can then be used as leave whenever most convenient (*until the end of the pregnancy period*)

The company is open to adapt the programme to individual needs. In special cases, the employees may work at home on an individual assignment.

The employees participating in the programme, as well as their direct supervisors, are responsible for the outcomes. The employees use individual working time account to keep track of the hours worked. At the end of each month they should present to the supervisor the number of hours worked as well as the current working time account balance for written approval.

The company reduced working hours for pregnant employees from 8 to 6,5h but the loss was compensated by the lower number of absences.

### ***3.4.4 Implementation: Survey over success and difficulties/problems in the process of implementation***

Success factors:

- Solution proposed constituted an answer to a real problem defined from the perspective of the employer, as well as employee (*business case*)
- Programme built up on the agreement made by top management, HR department, women employees and trade unions
- Pilot phase proposed as a testing period

Difficulties:

- Information flow between pregnant women employees, their supervisors and HR

department – as this is HR department which coordinates the project, HR manager should be informed on the very early stage of women's pregnancy about their will to join the project.

### ***3.4.5 Results***

There were following non-quantifiable benefits identified:

- increased trust towards the company among future mums
- increased loyalty
- increased work motivation
- increased physical and psychological comfort, feeling of security
- awareness that being a mum does not exclude professional career
- better image and greater prestige for the company (*award for Women Friendly Company*)

The company, willing to present this innovative programme, took part in the contest for the Women-Friendly Company award and has received and award.

The male employees appreciate the programme as the satisfaction of their pregnant colleagues has a positive impact on the work atmosphere in the whole division.

It is worth mentioning that there was the information campaign on mobbing threat, addressed to all employees. Each employee who feels threatened may ask HR Director or trade union representative for help.



## 3.5 Portugal – Danone Portugal

Ana Vicente and Anita Sares – CITE  
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Anabela Ribeiro – APEE  
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Eudelina Quintal – CESIS  
(Centre for Studies for Social Intervention)

Maria das Dores Guerreiro and Sara Neto – ISCTE  
(Superior Institute of Enterprises and Labour Sciences)

### 3.5.1 Company Identification

The company Danone Portugal SA, a multinational company that produces and commercializes dairy products, has got two establishments in Portugal, one in Lisbon and the other in Castelo Branco. At present, the company has 320 employees.

### 3.5.2 Framework of the project

Danone's concern for the well-being of its employees is present and deep rooted in the humanistic values and company's culture of proximity. In 2004, the Portuguese Unions Confederation CGTP-IN (*General Confederation of Portuguese Workers – National Trades Union*), in the scope of the Equal "Act for Equality" project, and as an interlocutor entity, proposed to Danone Portugal a study and debate with all interested parties on the company's practices concerning equality and non-discrimination between women and men. For this purpose, a diagnosis of the company was made, which resulted in both the negotiation and signing of a protocol between CGTP-IN (*General Confederation of Portuguese Workers*), the workers' representatives and FESAHT (*Federation of Restaurant, Bar, Hotel and Tourism Workers of Portugal*) for the implementation of positive action measures.

### 3.5.3 General objectives of the projects and objectives concerning equality

The aim of Danone by participating in this project was the formalization of the company's values and the promotion of social dialogue.

The main objective of the negotiation and signing of the protocol was the development in the company of positive actions in the sense of preventing any form of discrimination between women and men.

The basis of the protocol negotiation was a combination of assumptions regarding gender equality:

- elimination of discrimination and more balanced distribution of women and men;
- access of women to professions in which they are underrepresented;
- elimination of wage disparities between women and men in the performance of the same duties;
- organizational culture based on the principles of equal opportunities;
- valorisation of the role and importance of the women's contribution to economy in companies/organisations through the elimination of direct and indirect discrimination and also through taking advantage of the skill potential of female workers and improving the working environment;
- social responsibility shared between subscribers to the protocol, in the sense of the actual construction of gender equality in the working place.

### 3.5.4 Survey of actions planned

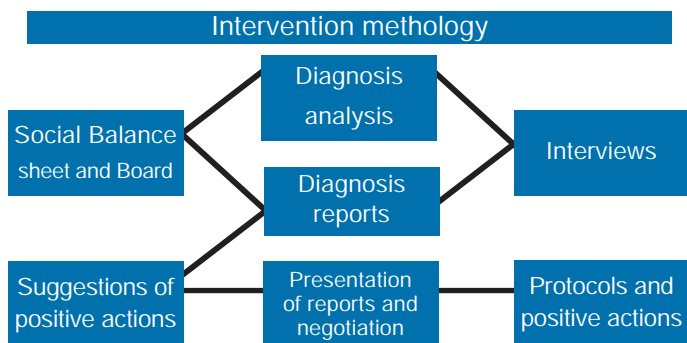
This case study, in its different phases of intervention and methodological process reflects the following principles for the successful implementation of equality measures:

- Objectives in relation to gender equality need to be specified and negotiated;

- Gender Mainstreaming is to be based on a top down and bottom up approach;
- Gender Mainstreaming is not a project/product but a transversal issue, integrated in the policy of an organization, engaging all stakeholders
- Interactive communication.

There were 4 phases of intervention methodology:

- Diagnosis elaboration;
- Definition of positive action measures with the involvement and participation of agents;
- Design of the agreement/ protocol;
- Following up and evaluation.



The diagnosis, which included an attempt to investigate equality practices between women and men within the organisation, was structured in 3 stages:

1. Collection and analysis of statistic and documental information that enabled the characterization of the company with regard to its human resources politics on equality between women and men;
2. Visit to the company, during which interviews were made with people responsible for the company and representatives of the workers with the objective of clarifying and explaining in detail the information obtained through the documental analysis. The interviews allowed for information to be collected in order to help with the compilation of the diagnosis;

3. Elaboration of a diagnosis report.  
The objective of the presentation, debate and negotiation of the positive actions plan between the involved agents was:
  - to guarantee active participation, managing the different interests without compromising the strict nature and objectives of the negotiation;
  - to present concrete proposals and to weigh up the arguments to be presented.

The conception of the positive action agreement implied:

- consideration of the mutual advantages;
- fundamenting with credibility, highlighting the positive aspects;
- guaranteeing conditions of the actual application of the measures;
- written formalization and its disclosure.

The permanent evaluation that shall follow the execution enabled:

- the realization of a balance between the problems, objectives and results;
- the obtaining of ideas for future intervention processes;
- the envisaging of ways to disseminate good practices.

The whole methodological process carried out in the company occurred in the production unit of Castelo Branco. However, all employees were informed of the project through the company's internal magazine. All the results and measures were implemented in a dialogue with the workers and union representative, thus achieving a strong involvement of all employees.

From the very beginning, the initiative included the involvement of General Director, who supported and followed the work. The Human Resources Department took an active part and has been in charge of implementing the proposed measures.



With the elaboration of the diagnosis and signing of the protocol, identifying the measures to be developed, the Human Resources Department (*HRD*), in negotiation with the union representative, formalized the former's informal policy. As gender equality and conciliation between professional and family life are considered EU and national requirements, the protocol agreement established between the parties included the following intervention areas:

- Recruitment and Selection: insertion of proceedings that promote the application of the less represented sexual in the recruitment process.
- Vocational training: introduction of a module on Equal Opportunities in training plans; access to vocational training in such a way that the less represented sex in certain areas also acquires skills for performing duties in these areas.
- Performance evaluation: inclusion of objective indicators in the performance evaluation system in order to avoid discrimination based on sex.
- Professional Categories, Career Plans and Promotions: incentive towards the inclusion of women and men in workplaces where their participation is null or considerably inferior to that of the other sex, establishing a preference criteria regarding equal circumstances for occupation of vacant positions; creation of mechanisms to enable the access of workers to the top of careers in the manufacturing area.
- Payment: guarantee that all the workers who temporarily perform higher duties are adequately paid in total compliance with the legal standards.
- Reconciliation of Professional and Family Life: elaboration of a study intended for assessing workers' needs so as to adequately conciliate professional and family life. Offer of a "Bledina" food basket for the birth of workers' sons/daughters and a 100.00 credit for the same products to be used until the baby's first birthday.

- Maternity and Paternity: not to prevent maternity and paternity rights to be exercised, by not direct or indirectly harming workers for their compliance.
- Non discrimination and equality: posting of information in the company related to workers' rights and duties concerning equality and non discrimination, and promotion of campaign disclosure and information, with a view to contributing to change in culture and citizenship based on non-discrimination of gender or on any other form of discrimination.

### ***3.5.5 Implementation: Survey on success and difficulties/problems during the implementation process***

The example presented in this case study allows us to state that the principles illustrated had been confirmed. Therefore, reformulating them is not necessary.

These principles are formulated in a coherent and adjusted way aimed at an intervention for gender mainstreaming in organisational contexts. Nevertheless, concerning the process of implementation at Communication and Planning and Production of Intermediary Outputs level it is essential to proceed to a reflection on the strategies, the more efficient techniques and ways to reach the delineated objectives. It is therefore essential to establish evaluation processes supported by instruments that guarantee the participation of all stakeholders and that adequately and on time amend unexpected effects.

However the implementation of the process enabled some conclusions to be made concerning less positive aspects and success factors.

#### ***3.5.5.1 Difficulties felt and strategies to overcome it:***

- Communication and Planning – it is necessary

to plan communications with all interveners in the process. This factor is important for reaching several objectives: to maintain the focus on the subject, to encourage motivation, to inform about the following steps, reinforcing the results achieved in the concluded phases.

- Production of intermediary Outputs – in order to reinforce involvement, the effort made and work done by people, the process must present intermediary outputs, even though they are not finalized, so as to make the effort visible and so that the acquired instruments and knowledge may continue to be included in the organization.

#### *3.5.5.2 Success Factors:*

- Opportunity of the company to audit its own practices concerning equality and non-discrimination.
- Promotion of dialogue with union partners and workers.
- Broad discussion of issues related to gender equality in the whole organization.
- Reinforcement of the interest in continuing to work on gender equality related issues (*interest in making a diagnosis on the subject of conciliating family and professional life*).
- Opportunity of the company to formalize and communicate its practices internally with regard to equality and non-discrimination.

# 4 Appendix – Overview over participating DPs and organisations

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## 4.1 Austria

### 4.1.1 The EQUAL Development Partnership - Quality-Development of Gender Mainstreaming

Starting point of the development partnership Quality Development Gender Mainstreaming: Concepts, Implementation, Evaluation is the experience that Gender Mainstreaming (GM) is a very complex strategy to achieve equality in institutions, in organisations and on the labour market.

In spite of this complexity there are no universally recognized quality standards on the Austrian market today for the implementation of equality measures. This development partnership therefore considers it as its essential task to work on the quality development of this strategy in order to improve the effectiveness of equality measures.

Key players of public organisations, non profit and profit organisations in 5 sub-projects work on quality development of GM in the field of public funding, organisational development and GM consulting and training. They work out theoretical concepts and carry out pilot and training projects, which they execute and evaluate in their own and in other organisations.

The objective is an integrated approach for quality development:

- Competences of experts are bundled,
- Existing know-how and experience are combined,
- Management competences and consulting

services are analysed in regard to equality efficiency

- Guidelines are formulated.

Theoretical results from the development process are continuously tested in a practical context. This regular feedback from practitioners is an essential element of the project and is assured through a series of workshops (*platform*) carried out with representatives of strategic partner organisations who are responsible for practical implementation of equality measures in their organisations.

### 4.1.2 The organisations involved

#### 4.1.2.1 abz\*austria – competence for women and business

Since it was founded in 1992 the abz.austria has been an important player in the field of training, counselling and career development for women. As Austria's largest women's organisation our mission is to prepare women of different backgrounds and at different stages in life for (re)entering the job market in qualified positions which enable them to lead financially independent lives.

Our approach is to cooperate closely with other key actors on the labour market on the national and European level. As a turntable between policy makers, enterprises and women looking for career opportunities we have been very successful at developing and implementing innovative programmes supporting different target groups of women and bringing about structural change.

One of abz.austria's goals is to use its expertise on a European level and cooperate with interna-

tional partner organisations which pursue similar objectives.

Originally conceived as a professional training and employment project to help women re-enter the secretarial field, abz.austria meanwhile offers a broad range of services:

- job market counselling
- professional training courses in the IT sector re-integration through subsidized jobs in the secretarial field
- special orientation and training programmes for women returning to the labour market after a longer period of child care activities
- training and mentoring programmes for migrant women
- programmes for older women (45+)
- programmes for women with a low level of formal training

At the same time abz.austria carries out projects to bring about structural change in fields relevant for the career advancement of women:

- Gender Mainstreaming
- Reconciliation of family and work life
- Innovative solutions for women in rural areas (*mobility, child care, working hours*)

In all these fields abz.austria cooperates with relevant actors in the public and the private sector.

The abz.austria employs around 80 women. It is a purely project based organisation. and carries out projects commissioned by the Employment Offices of Vienna and Burgenland, the Vienna Employment Promotion Fund, the European Commission, the European Social Fund (*Equal*).

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#### 4.1.2.2 ARCO – Consulting. OEG - *Personnel and organisational development*

ARCO – the art of consulting

- Was founded by three self-employed consultants with the objective to effectively consult organisations by using the different resources and competences of the consultants involved to the benefit of the customer.

ARCO – the art of consulting

- Means the art of building a bridge between the individual organisation and the consulting company with the objective of successful organisational development.

ARCO – the art of consulting offers the following services

**Organisational development** - above all the introduction of

Structures

- Organisational change in teams and departments
- Mergers of teams, departments and organisations

Perspectives

- Gender Mainstreaming (*the effects of processes, structures and products on women and men is being systematically examined and taken into account*) – equality – gender justice in organisations
- Diversity-Management
- Changes in organisational culture

## Technologies

- Informations-/Communications technologies

## Personnel development

- Curricula for executive training
- Conducting group processes for executives
- Development of goals and visions

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## 4.2 Germany

### 4.2.1 The EQUAL Development Partnership „Berlin DiverCity“

The EQUAL Development Partnership „Berlin DiverCity“ is a co-operation network and consists of four main partners in Germany:

- FrauenComputerZentrumBerlin e.V. (FCZB *(coordination)*)
- Deutsche Telekom
- LIFE e.V.
- Eine Welt der Vielfalt

These partners have entered into further co-operation with companies, institutions, local and regional authorities, associations and networks in Berlin or work together with partners in their projects in order to reach the various target groups of the development partnership. They also strive to ensure sustainable, structural effects in Berlin. Coordinated by FCZB the network partnership pursues the goal of contributing to mastering structural and demographic change in Berlin as well as the consequences of globalisation, of implementing anti-discrimination legislation in organisations and of strengthening civil commitment in the city.

Berlin DiverCity follows an integrative approach.

The overriding labour market goals of the development partnership „Berlin DiverCity“ are to afford easier market access to target groups who had been discriminated on the labour market up to now, above all female target groups and those with a migration background, to open up to them future-centric labour market segments (*IT sector, technology, natural sciences*) and to convince both companies and institutions (*e.g. public authorities and schools*) of the potential of these target groups. This goal is closely linked to necessary economic and social policy developments and challenges (*see problem outline*) which aim to make Berlin companies and institutions, especially public authorities and schools

as well as non-profit organisations both future-viable and competitive: strengthening the different and diverse levels and potential of a „city of knowledge“ (*in education, qualification, employment, business areas and organisation strategies*), preparing for demographic change through changes in organisation and personnel policies, globalisation, EU enlargement and transposition of the EU anti-discrimination directives into the applicable law of the Federal Republic of Germany.

In the sub-project Deutsche Telekom will implement the three main elements of the integrated action approach of the development partnership as a pilot project in Berlin. The different measures will be processed as good practice examples for other companies and institutions and then made available. Implementation of a diversity strategy, work and life balance measures from the diversity perspective and youth mentoring program (*JUMP in MINT*) with portal. JUMP in MINT (*youth mentoring portal in mathematics, IT, natural sciences, technology, energy and craft trades*) supports pupils in their career orientation.

### 4.2.2 The organisations involved

#### 4.2.2.1 Deutsche Telekom

Deutsche Telekom is one of the world's leading telecommunications companies and focus on the three main growth areas in the industry - Broadband/Fixed-network, Business Customers and Mobile Communications.

The Group offers its customers (*private and corporate customers*) the entire spectrum of IT and telecommunications services from a single source: from wireless communications, Internet and fixed-network to complex IT and telecommunications solutions.

Deutsche Telekom is represented worldwide in around 50 countries and has around 250,000 employees. Around a third of them work for subsidiaries and affiliates outside Germany

The Group is present in the most important markets in Europe, Asia and America and generates around 46 percent of its revenue outside Germany.

Its employees are the company's most important resource and the most significant factor in its success. Deutsche Telekom is traditionally one of the largest providers of vocational training in Germany and offers training both in the ITC sector and in commercial fields.

"As the leading services company in the telecommunications and information technology industry, we network society for a better future. With top quality, efficiency and innovation, to the benefit of our customers. In every respect."

As a global player in various business segments that unites different corporate cultures under one roof, diversity and a respectful way of thinking and acting are the keys to our success.

#### Contact

Within the Deutsche Telekom Group the Diversity Department is responsible for the sub-project "Diversity Implementation" in the development partnership "Berlin DiverCity"..

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Project manager EQUAL: [Sabine.Klenz@telekom.de](mailto:Sabine.Klenz@telekom.de)

#### 4.2.2.2 LebensWelt gGMBH

LebensWelt gGmbH is an independent youth welfare service agency operating in an intercultural context. Within the EQUAL development partnership „Berlin DiverCity“, LebensWelt cooperates with the organisation „Eine Welt der Vielfalt Berlin e.V.“ (*A World of Difference, Berlin Association*). Main target groups of social work according to the national child and youth welfare legislation (*„Hilfen zur Erziehung Sozialgesetzbuch SGB VIII“*) are families and young adults both with national and migrant background.



## 4.3 Poland

### 4.3.1 The EQUAL Development Partnership: „Gender Index“

In response to the problem of women's discrimination in the workplace, the experts at the United Nations Development Programme (UNDP) in Poland created the Gender Index Project. Its goal is to develop solutions for effective company management incorporating equal opportunity policies. The Gender Index Project aims to create good workplace environments that promote equal opportunities for men and women in Polish companies. We encourage employers to adopt innovative and progressive solutions in management to use their human resources to their fullest potential. By popularising solutions promoting the equal treatment of women and men in the workplace, we introduce tools that increase a company's profits and improve its effectiveness. The Project also promotes specific firms that recognise employees' needs to achieve a work/life balance. We work to prevent discrimination and support the full development of women and men.

„Gender Index“ consists of 6 partners: Ministry of Labour and Social Policy, Warsaw School of Economics, Polish Confederation of Private Employers Lewiatan, Derm-Service Pologne, Feminoteka Foundation and International Forum for Women. These partners became involved in following activities:

- Gender Index measure - a tool that analyses the workplace and a company's personnel policies from the perspective of the equal treatment of women and men
- Competition – The Equal Opportunities Company
- Good Practice Guide “Equal Opportunities Company”
- “Managing Equal Opportunities Company” – a training model

## 4.3.2 The organisations involved

### 4.3.2.1 United Nations Development Programme (UNDP)

United Nations Development Programme (UNDP) is the UN's global development network, an organization advocating for change and connecting countries to knowledge, experience and resources to help people build a better life. We are on the ground in 166 countries, working with them on their own solutions to global and national development challenges. As they develop local capacity, they draw on the people of UNDP and our wide range of partners.

World leaders have pledged to achieve the Millennium Development Goals, including the overarching goal of cutting poverty in half by 2015. UNDP's network links and coordinates global and national efforts to reach these Goals. Our focus is helping countries build and share solutions to the challenges of:

- Democratic Governance
- Poverty Reduction
- Crisis Prevention and Recovery
- Energy and Environment
- HIV/AIDS

UNDP helps developing countries attract and use aid effectively. In all our activities, we encourage the protection of human rights and the empowerment of women.

Contact:

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<http://www.genderindex.pl>

### 4.3.2.2

Polish Confederation of Private Employers Lewiatan brings together 3000 companies-members of 53



unions, representing different geographical regions and different sectors of Polish economy which give employment to over 500.000 people.

PKPP Lewiatan is a member of the Tripartite Commission for Socio-Economic Affairs. It belongs to BusinessEurope - Union of Industrial and Employers' Confederations of Europe Confederation of Employers and Industry - representing interests of business people and employers in relation with the European Commission, European Parliament, and other EU institutions.

Contact:

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## 4.4 Portugal

### 4.4.1 The EQUAL Development Partnership *Diálogo Social e Igualdade nas Empresas (Social Dialogue and Equality within Enterprises)*

The Project *Diálogo Social e Igualdade nas Empresas (Social Dialogue and Equality within Enterprises)* is a project developed within the frame of EQUAL Community Initiative. Its Action 2 is currently running from April 2006 to April 2008. Companies are its main target and it has as objectives:

- To reinforce incentives, follow-up and marketing of good practices in the field of gender equality in labour market;
- To support companies in the promotion of what concerns gender equality and non-discrimination, maternity and paternity protection and work-life balance;
- To reinforce the gender equality dimension within the frame of Corporate Social Responsibility.

To accomplish these objectives, we have been working with companies in the following activities:

- Development of instruments to promote gender equality and work-life balance within companies
- Encouragement of companies' good practices
- Development of instruments for companies' self-evaluation and monitoring of gender equality and work-life balance
- Establishment of criteria and gender indicators to support the dissemination of the gender equality approach in the corporate social responsibility

The project is developing the following Products:

- Solutionary - Encouraging good practices

- Gender equality self-evaluation guide for companies
- Training curriculum for consultants on gender equality in the workplace
- Set of gender indicators to be incorporated by corporate social responsibility
- A video with good practices of companies involved in the project

The project is being conducted by a Development Partnership (*DP*) composed of 9 organisations, comprising public organisations, social partners, universities and research centres as well as civil society organisations:

- CITE – Commission for Equality in Labour and Employment (*coordinator entity*)
- CESIS – Centre for Studies for Social Intervention
- RTP – Portuguese Public Television
- ISCTE - Superior Institute of Enterprises and Labour Sciences
- APEE – Portuguese Association for Business Ethics
- IAPMEI - Institute for the Support to Small and Medium size Enterprises and Investment
- CCP – Portuguese Retail and Services Confederation
- CGTP – General Confederation of Portuguese Workers – National Trades Union
- UGT – General Workers' Union

### 4.4.2 The organisations involved

From this DP four partners participated in the transnational working group that developed this brochure:

#### 4.4.2.1 CITE – Commission for Equality in Labour and Employment

The Commission for Equality in Labour and Employment (*CITE*) was created in 1979 in order to fight discrimination and promote equal opportunities and equal treatment for women and men in labour, in employment and in vocational training, in both the public and the private sectors, as provided for in the Portuguese Constitution and laws.

CITE comes under the authority of the Minister of Labour and Social Solidarity. It is of a tripartite composition, with representatives from Public Administration and from the Social Partners (*Workers and Employers Confederations*): CCP – Portuguese Retail and Services Confederation, CIP – Confederation of Portuguese Industry, CGTP-IN – General Confederation of Portuguese Workers-National Trades Union, UGT – General Workers' Union.

Its main responsibilities are the promotion in the private and the public sectors of:

- Equality and non-discrimination between women and men in labour, in employment and in vocational training;
- Protection of maternity and paternity;
- Reconciliation of work and family life.

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#### 4.4.2.2 CESIS – Centre for Studies for Social Intervention

CESIS is a non profit independent organisation of researchers from a range of disciplinary back-

grounds concerned to promote evidence-based, policy-relevant research at both national and European level.

CESIS activity is based on a multi-disciplinary approach with the regular co-operation of researchers from the different areas of the social sciences: sociology, economy, psychology, anthropology, social work.

CESIS has links and protocols with public and private institutions, both national and European.

Among the areas of research and action-research that have secured a continuity of programmes and projects, giving rise to research reports, seminar papers, articles and books as well as pedagogical tools, the following are worth mentioning:

- Poverty in degraded urban areas;
- Ageing and older people;
- Migrants and cultural minorities;
- Homeless people;
- Gender equality;
- Labour and employment;
- Children and youth from disadvantaged environments;
- Social policies.

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Web: <http://www.cesis.org>

#### 4.4.2.3 APEE - Portuguese Association for Business Ethics

APEE was founded in November 2002, by a group of professionals and executives who felt a strong need both for action and for moving from concepts

and theorization on Ethics and Social Responsibility into the definition and implementation of tangible programmes in accordance with acknowledged and accepted points of reference.

Activities:

- Ethics in action: APEE develops and promotes awareness courses in the scope of Ethics and Social Responsibility
- Standardisation: As a Sectorial Standards Body within the organizations, APEE ONS supports the Technical Commissions which are developing Portuguese standards on those domains.
- Research and Development: APEE has been participating and collaborating in studies concerning its field of action ever since its foundation.

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#### *4.4.2.4 ISCTE - Superior Institute of Enterprises and Labour Sciences*

ISCTE is a university institute that teaches, confers the various levels of academic degrees and develops research (basic and applied) in diverse areas, in the field of Social and Enterprise sciences, of Humanities sciences, Information (*NTI*) and Architecture. It has about 10.000 students either of graduation level and postgraduation level. Strongly investing in life long learning, ISCTE provides several courses in after labour time schedule, attended by students who already are in the labour market. Several of its courses and research centres hold a classification of Excellency conferred by official juries of international evaluation.



Austria



Germany



Poland



Portugal



Slovakia

CENTRUM  
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