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THE USE OF A GENDER INDEX IN THE IMPLEMENTATION OF AN EQUAL OPPORTUNITIES POLICY IN ENTERPRISE

Abstract

The equal opportunities policy is attracting more and more supporters within Polish entrepreneur circles. Certain phenomena such as; the migration of professionals to EU countries, aging of the Polish society, new regulations prohibiting discrimination in the workplace on grounds of gender and higher levels of education among women in relation to men, have awoken much interest in gender equality issues at the present time. The implementation of these policies in enterprises will not only boost women's role within the labor market, but also, provide a source of economic advantages and increasing benefits to employers. One of the tools intended to monitor gender equality in the workplace is the Gender Index.

The aim of this article is to show the advantages arising from the implementation of an equal opportunities policy in enterprises with particular attention to the Gender Index.

Key words: payroll discrimination, model of personal biases, the labour market signals theory, gender equality policy, Gender Index.

1. Introduction

One of the features of labor markets in numerous countries is the occurrence of disproportion between women and men employed in any particular field. This phenomenon is characterized by:

- higher employment rate among men;
- higher activity rate among men;
- higher unemployment rate among women;
- horizontal segregation, according to which the professional activity of women covers a few employment fields only, while the same activity of men is uniformly spread over nearly all areas [Korzec 2000];

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- occupational segregation in a vertical plane expressed by a lower women proportion in relation to men holding positions of managers or other posts associated with making decisions, or by an unequal remuneration rate for the same job [Ibidem].

The implementation of the equal opportunities policy in enterprises is the chance for the correction of such inequities, and also for taking countermeasures against the discrimination on grounds of gender.

The main objective of this article is to obtain answers to the following questions:

- What are the reasons for discrimination against women in the labor market in light of economic theories?
- For what reasons would an employer be interested in the implementation of an equal opportunities policy within its own business organization?
- How could an equal opportunities policy be implemented in an enterprise and do tools currently exist to do so?

2. Discrimination against women in the labour market from an economic point of view

For the first time, the general definition of the notion of discrimination appeared in 1954, in the paper under the title: “The Nature of Prejudice” by the American psychologist, Gordon Willard Allport. He has described the discrimination, as “*the prejudice of the individuals or groups of people’s right to the equal treatment expected by them*” [Las kobiet... 2010, page 4]. 25 years later, this notion was entered into the Convention on the Elimination of All Forms of Discrimination against Women (CEDAW), adopted in 1979 by the UN General Assembly. In Article 1 of that document, we can read that discrimination against women means “*...any distinction, exclusion or restriction made on the basis of sex which has the effect or purpose of impairing or nullifying the recognition, enjoyment or exercise by women, irrespective of their marital status, on a basis of equality of men and women, of human rights and fundamental freedoms in the political, economic, social, cultural, civil or any other field.*” [Konwencja w sprawie likwidacji..., Art.1].

According to the Polish Code of Labour, discrimination against an employee in a labour market is defined as “*unequal treatment, indirectly or directly, to the extent of the employment and termination of service, terms of employment, promotion, and an access to training courses to improve vocational qualifications, based on gender, on belief, nationality, or sexual orientation, etc., as well as, every behaviour, which aims at or results in an employee’s dignity infringement, or an employee’s degradation, or humiliation, so called – harassment* [Kodeks pracy... 2008, chapter IIa, art.183a].

From an economic standpoint in relation to the labour market, two categories of discrimination are emphasised. The first one is restrictions in the access to education and other forms of investing in human and social capital that discriminated individuals encounter [D'Amico 1987, page 311]. The second category illustrates the situation, where individuals characterised by identical or equalling economic features are treated in an unequal way in terms of promotion, forming work condition, or receiving of different remuneration for the same job [*Handbook of Economics...* 2009, page 91].

In reference books regarding women's situation in the labour market, utmost importance is attached to payroll discrimination. In Poland and also in many other European countries women earn less in comparison to men. According to data taken from the All-Poland Remunerations Report carried out in 2011, the average women's wages were at the level of 3,400 Polish Zlotys and were lower by 18% than those of men (4,000 Polish Zlotys). Women holding management positions had salaries of 5,000 Polish Zlotys, while the men's salary were – 6,000 Polish Zlotys. The most substantial disproportions have been noted in the highest rank of management: women directors or members of boards had salaries recorded to be 10,000 Polish Zlotys, while the men's were set at 13,000 Polish Zlotys (a 23% difference) [*Wynagrodzenia kobiet i mężczyzn...* 2012].

Common models illustrating this phenomenon of payroll discrimination are: the model of personal biases by G. Becker and the labour market signals theory by M. Spencer.

G. Becker notices personal prejudices against women by employers, co-workers, and clients among other causes of the payroll discrimination. Employers, motivated by their bias against women, offered them lower salaries than male employees while justifying this difference as compensation for psychological suffering endured when working with women. In light of this, an increase in the number of discriminating employers and the incidence of personal biases mean that payroll discrimination for women will only increase. A similar mechanism occurs in the case of co-employees' being bias against women. Employers, by paying lower wages to women, compensate themselves for expenses incurred due to bonuses paid out to male employees, who apparently suffer psychologically when working with women. In regards to clients, differences may arise in terms of prices that clients would be willing to pay when buying goods from men as opposed to women. In the end, this would cause a decrease in revenues earned by enterprises employing the 'softer sex', thus marginal productivities and women's salary [Słoczyński 2008, pages 80-85].

The assumptions underlying the Market Signals Theory by M. Spence are as follows [Spence 1973, pages 356-357]:

- comparing the decision of an employer on whether to hire an employee to buying a lottery ticket (the cost of the ticket equals the salary figure, and the uncertainty of winning is associated with a lack of information on the actual productivity of a candidate);
- employment and the salary level are determined on basis of a candidates' observable attributes covering signals (such as, education, previous occupational experiences, a criminal record, etc.) and indices (age, gender, race, etc.);
- signals depend on a human and may be subject to change depending on investments in education (training courses, additional studies), while the indices are unchangeable;

One of the conclusions coming from such a model is the fact that in conditions of uncertainty, the employer may assess an employer's productivity on the grounds of his/her gender. In other words, when comparing a particular woman and a particular man representing comparable signals, a woman may be deemed as a less productive person, thus she may get a lower salary. The prerequisite (precondition) for the occurrence of such dependence is the employer's conviction of higher men's productivity compared to women's [Ibidem, pages 368-374].

3. From discrimination to equal chances. Gender equality in an enterprise

The breakthrough moment for improvement in women's situation within the Polish labour market was the accession of our country into the European Union. This accession was associated with the necessity to adapt Polish Laws, the economy, etc., to European standards. Poland has signed a number of agreements and declarations, that contain provisions concerning the prevention of discrimination on grounds of gender, also concerning the professional activation of women, support of the women's and men's equal opportunities within the labour market in respect to wages and salaries, and so on. However, the implementation of such solutions requires time as well as many amendments to Polish legal regulations, and the initiative of employers themselves.

The particular role, among the proposals leading to a reduction or elimination of discrimination on grounds of gender, is assigned to the gender equality policy. In reference literature, gender equality is understood as women and the men being attributed to the same social value, equal rights and duties, as well as the assurance of "an equal access to resources (financial measures, chances for development), which they could use" [Polityka równości płci w praktyce... 2006, page 131].

The gender equality policy may be discussed on the State level – gender mainstreaming and an enterprise – gender equality policy.

In the first case, it means “*the assessment process of impact of any projected actions (including legislation, policy, pr programmes) in all spheres and at all levels, on women’s and men’s situation. It is a strategy, according to which the problems and experiences of women and men become an integral element of planning, implementation, monitoring, and evaluation of all policy and programmes in all spheres of the political, economical, and social life, so that the women and the men experience equal benefits, and inequity does not solidify* [Report of the Economic... 1997, page 28]. The originality of such an approach to the problem is supported by social and cultural gender determinations in all spheres of the State policy being taken into consideration. Women and men are deemed to be equal beneficiaries and active participants in State development [Polityka równości płci w praktyce... 2006, page 71].

In the second case, according to M. Rawłuszko, it means “*the acts of an enterprise contained in the frames of a personnel strategy and aimed at prevention of discrimination and promoting the equality in a workplace*” [Przewodnik dobrych praktyk... 2007, page 27]. This definition emphasises two essential elements of such a policy. Firstly, in an enterprise, all employees, regardless of gender, are subject to the same criteria concerning vocational development opportunities, professional duties combining with family ones, remuneration, work assessment, personal dignity protection, etc. The second aspect implicates the formation of an organisational culture of equal opportunities. The inclusion of both elements in the standards of the enterprise operation is a guarantee for the working environment, in which every employee, regardless of gender, remains a valuable resource of the organisation.

The implementation of an equal opportunities policy in an enterprise is a complicated and long-term process equally involving both ordinary employees and management staff, in particular Human Resources Department and human resources managers (Table 1.)

Table 1. The implementation of an equal opportunities policy in the enterprise.

Stages	Actions
<p>Planning and decision making</p>	<ul style="list-style-type: none"> • Assumption of the vision of the organisation, where the policy for the equal treatment is seen as a strategic investment in the enterprise management; • Determination of goals associated with the opportunities equity based on thorough analysis and an assessment of the enterprise's policy, its programs and procedures (an audit from the point of view of the gender equality); • Effective announcement of a new vision and targets of the enterprise to all members of the organization; • Enabling the opinions and experiences to be exchanged between the lower level personnel and the management staff with use the feedback tool.
<p>Implementation and organisation of actions</p>	<ul style="list-style-type: none"> • Implementation of solutions that enable monitoring and an impact assessment of the areas in terms of gender, namely: recruitment, employee appraisal, training and development, motivating, promoting, payments, and employees' selection; • Training programs implementation that are addressed to the employees, and intended to improve an awareness level as to the various forms of discrimination at a workplace in terms of gender, negative effects of inequity, advantages from the implementation of the enterprise's equal opportunities standards, methods how to manage with barriers, obstacles in creation of an equal opportunities enterprise; • Use of specialised consulting companies in the key problems related to the gender equity; • The acts in the frames of human resources management function, namely: righteous, clear procedures of recruitment, remunerating and promoting, implementation of possibility to choose flexible forms of employment of those who have children, implementation of parental leaves, encouragement of women-employees participation in external networks of co-operation to utilise and improve their potential, creation of homogenous (female) working groups to promote professional development of women.
<p>Inspection and assessment of the effectiveness of implemented actions</p>	<ul style="list-style-type: none"> • Necessity of performing of internal audits for the enterprise's situation analysis from the women's and men's situation perspective following the implementation of actions. After every audit, a report comprising conclusions should be issued and made available to all employees; • Should these actions do not deliver the results envisaged, they must be continuously modified; • Comparison of own actions in the sphere of the equality to the initiatives undertaken by competitive enterprises.

Source: a compilation on the basis of [Przewodnik dobrych praktyk... 2007].

In summarizing the issue of an equal opportunities policy, it can be concluded that the potential economic benefits to an employer mean it is worth looking into.

On the grounds of many case studies, there exists a correlation between the presence of women taking managerial positions in a firm and its profitability. The example are case studies carried out in 2009 and 2010: “*Women in Capital Market Companies 2009 and Women in Quoted Companies 2010.*” An investigation has been carried out of companies quoted at the Warsaw Stock Exchange. It concludes that companies with over 30% of women’s participation in the board of managing directors and the supervisory board have more frequently noted nominal growths both in the value of the net sales proceeds and value of assets for 2009 in comparison to 2008, than enterprises having no women in the board of managing directors or having less than 30% of women in the board. It proves the thesis that a greater involvement of women holding the top positions helps the companies to achieve better financial results [Lisowska 2010, pages 3-12].

Secondly, an entrepreneur resigning from diversification in genders of personnel deprives himself of added value which could be contributed by women. I am referencing, inter alia, - different experiences, their values, attitudes, etc. “*On the consumers’ market, the more the personnel structure of the company reflects the market population structure, the better new market demands may be sensed by it and adapted to.*” [Przewodnik dobrych praktyk...2007, page 33]

Moreover, among the advantages the following can be identified: minimisation of risk and costs related to the costs of discrimination suits, a positive impact on a source of a company’s competitiveness – employees, decrease in a personnel instability (rotation) and associated costs [Ibidem, pages 33-34].

4. Gender Index characteristics

The first step in fighting against gender discrimination within labor market is finding an answer to questions concerning extent, scope, and nature. For this purpose, the equality indexes are used (Table 2).

Table 2. The review of synthetic equality indexes being applied in an international comparative research.

Index	Provided information
Gender – related Development Index (GDI)	<ul style="list-style-type: none"> • it determines a social and economic situation of respective countries taking into consideration a gender; • it is composed of three main variables calculated separately in relation to women and men in a given country: <ul style="list-style-type: none"> - life expectancy; - access to knowledge measured in terms of average number of years of education received by inhabitants of 25 years-old and elder and in terms of years of education of people starting education process; - life standard determined according to per capita GDP measured in Power Purchasing Parities.
Gender Inequality Index (GII)	<ul style="list-style-type: none"> • it characterises the following areas: <ul style="list-style-type: none"> - health quality measured in terms of a women’s mortality rate during deliveries and a birth rate amongst women 15-19 of age; - participation and representation measured in terms of women’s and men’s proportion in population of at least secondary education and measured in terms of women’s and men’s representation ratio in official authority structures at the State level; - employment measured in terms of women’s and men’s activity rate.
Gender Equity Index (GEI)	<ul style="list-style-type: none"> • it measures a difference in women’s and men’s situation on basis of available and comparable data at an international level; • enables a classification of States in terms of gender inequality index in areas, as follows: education, involvement in the economy and participation in public life.
Gender Gap Index (GGI)	<ul style="list-style-type: none"> • it is calculated by the World Economic Forum for 130 countries; • determines the difference extents between women and men in the spheres, as follows: economy (wages & salaries, accessibility to positions that require high qualifications), education (accessibility to education, illiteracy), political authorities (representation in decisive structures), health (average life expectancy).

Source: Own compilation on basis of [Human Development Report... 2011; Measuring Inequity... 2012; The Global Gender Gap... 2011]

The Gender Index (the index for equal treatment of women and men) has been developed within the framework of the Gender Index Project implemented in partnership between the United Nations Development Programme and the EQUAL Community Initiative. For the first time, it was implemented in Poland during investigation of companies selected to participate in “The Company of Equal Opportunities 2006”, a competition aimed at the distinction and presentation of organisations assuring equal

opportunities to all employees. The application of this index enabled the arrangement of companies in order of determined values relating to equality enjoyed by company employees. In this aspect, the key feature of the index comes forth into view, namely, it is “*the synthetic measurement that enables the investigators evaluate, and assign a mark to all investigated organisations in a form of a numerical value, thus creating the space for comparisons and ranking*” [Monitorowanie równości... 2007, pages 8-23].

The discussed index is a tool that surveys the organisation areas, which are especially susceptible to discrimination practices and serves as an equal opportunities monitor in the workplace. The research areas analyzed are: recruitment, access to promotions, protection against discharge from work, access to training courses, remuneration for work, protection against sexual harassment and mobbing, and the possibility of combining professional duties with family ones [Ibidem, page 29].

The Gender Index includes 40 diagnostic variables characterising respective areas. The diversified nature of these area requires different methods of processing the various information obtained through questionnaires by the personnel department and employees of an organization (Table 3). In the case of dichotomous features, an enterprise is assigned a value of 1 (when the situation is acceptable), otherwise the value is 0 (zero). In the case of qualitative features of more than two variants, the feature value identifies with an average category. However, in the employees’ answers, the adequate fractions of selected answers perform a role of scales when determining an average category [Ibidem, page 32].

Table 3. The Gender Index – diagnostic variables and methods of processing of information.

Diagnostic variable	Methods of processing of information
1. Employees recruitment	
Number of employees by education and gender in the year X.	Indicator showing employee structure by gender and education.
Formalised recruitment rules and procedures.	Value 1 or 0
Announcements regarding employee recruitment – if they include an information on a required gender or family status.	Value 1 or 0
Number of people employed in the year X.	Indicator showing relation of employees accepted to work on base of gender.
Employees’ opinions regarding job interviews when they applied for a job in their present company.	Indicator of differentiation in average number of questions given to candidates during interviews and regarding their private life by gender.

Diagnostic variable	Methods of processing of information
2. Possibility of promotion	
Number of employees according to position held and gender, in the year X.	Indicator showing employee structure by gender and position held
Number of employees according to contract agreement and gender in the year X.	Indicator showing employee structure by gender and forms of employment
Number of employees who were promoted in a given year according to gender in the year X.	Indicator showing promotional structure for employees by gender.
Employees' responses to the question of whether over the last year they participated in any training courses, seminars, etc., financed by the company.	Indicator showing differentiation of percentages of women and men participating in training courses and seminars.
Employees' opinions concerning whether they feel employees are often overlooked for promotion on the grounds of gender.	Indicator showing differentiation of women's and men's opinion on how gender impacts promotional opportunities.
3. Protection against dismissal	
Number of employees whose contracts of employment have been terminated by gender in the year X.	Indicator showing the characteristics of the employees' dismissals by gender.
Number of employees returning from maternity leave by gender in the year X.	Indicator showing the percentage of women having been employed at least for one year in the same position before maternity leave in relation to the number of women returning from maternity leave in the year X.
Number of employees returning from child-care leave by gender in the year X.	Indicator showing the percentage of women having been employed at least for one year in the same position before child-care leave in relation to the number of women returning from child-care leave in the year X.
Employees' opinions on whether there have been any cases in the company when an employee returning from child-care leave did not return to his/her previous position held.	Indicator showing the number of persons stating that there have been no cases of an employee not being able to return to the same position in the company after returning from child-care leave.
Employee opinions on whether there have been any cases in the company of bypassing regulations protecting pregnant women and those on maternity leave from being dismissed.	Indicator showing the average opinion concerning changes in work or payment terms or termination of employment with pregnant women or those on child-care leave amongst the all employees filling in the questionnaire.

Diagnostic variable	Methods of processing of information
4. Available training courses	
Number of employees attending training courses funded or subsidised by the Employer by gender in the year X.	Indicator showing structure of employees attending training courses funded or subsidised by the employer by gender.
Employees' opinions concerning whether employees are overlooked as candidates for training courses on the grounds of gender.	Indicator showing difference between women's and men's opinions on the impact of gender in designating employees for further training.
5. Fees and remunerations	
Average annual remuneration for women and men according to position held in the year X.	Indicator showing women's-to-men's remuneration ratio according to position held.
Monitoring the size and relationship of women's and men's remunerations holding identical job positions and whether or not such a system is in place?	Value 1 or 0
Fringe benefits (so-called bonuses) being offered to women and men by their company, broken down into managerial positions and remaining ones.	Indicator showing percentage employees on maternity and child-rearing leave designated for bonuses as compared to the total number of women to receive bonuses in the year X
Fringe benefits for employees on maternity and child-care leave.	
Employees' responses to the question of whether the company funds or subsidises training courses as a result of their own initiative, sporting activities, transport, medical care, vacations, and if subsidies, (excluding training courses), extend to family members of employees.	Indicator showing the difference in women's and men's opinions concerning the subsidising of further training or welfare benefits by the company.
Employees' opinions relating to how employees and their families take advantage of company financing of the above mentioned.	Indicator showing the difference in women's and men's opinions concerning how the subsidising of further training or welfare benefits by the company was taken advantage of.
Employees' opinions whether gender criterion has any influence on an size of remuneration in their present place of employment.	Indicator showing the differentiation in women's and men's opinions on the impact of gender on the amount of remuneration.
6. Combining professional and family duties	
Number of full time and part-time employees by gender in the year X.	Indicator showing full- time employees' structure by gender.

Diagnostic variable	Methods of processing of information
Number of employees working irregular hours (i.e. – contract work, individual work-time schedule or shorten working week) by gender in the year X.	Indicator showing structure of employees working irregular hours by gender.
Whether the company offers nursery or kindergarten services, financial assistance for childcare or rest, allows for family obligations of employees when determining holidays dates – yes or no.	Indicator showing the average number of organized services connected with childcare offered by the company.
Employees' opinions on how often the childcare responsibilities impede their performance of professional obligations.	Indicator showing the difference in women and men employees' opinions concerning the impact of childcare duties on their professional performance.
Employees' opinions on whether the company applies recommendable solutions in facilitating the co-existence of family life and work.	Indicator showing the percentage of people believing that a company employs recommendable solutions facilitating the co-existence of family life and work among employees filling out the questionnaire.
Employees' responses to the question of whether the company funds or subsidises training courses as a result of their own initiative, sporting activities, transport, medical care, vacations, and if subsidies, (excluding training courses), extend to family members of employees.	Indicator showing the difference in women and men employees' opinions on the topic of the company subsidising further training and welfare benefits.
Employees' opinions relating to how employees and their families take advantage of company financing of the above mentioned.	Employees' opinions relating to how employees and their families take advantage of company financing of the above mentioned.
Employees' responses to the issue of whether the company subsidises childcare or education of its employees' children.	Indicator showing the percentage of employees who believe the company subsidises childcare or education of its employees' children according to the employees filling out the questionnaire.
Employees' opinions on the degree of satisfaction concerning solutions applied within a company, facilitating the co-existence of family life and work.	Indicator showing the average degree of satisfaction of employees concerning solutions applied within a company, facilitating the co-existence of family life and work.

Diagnostic variable	Methods of processing of information
7. Protection against mobbing and harassment	
Information about seminars held at the company concerning equal treatment, preventing mobbing and harassment in the workplace.	The Index expressing an average number of seminars performed at a company in a sphere of an equal treatment by terms of gender equality, sexual harassment, and mobbing.
Number of employees submitting complaints concerning unequal treatment, sexual harassment, or mobbing by gender in the year X.	Indicator showing the structure of complaints raised by employees by gender.
Information whether an appointed person/organized unit is available to receive such complaints.	Value 1 or 0
Employees' opinions on whether they met with a situation when they were treated worse on grounds of their gender at a present workplace.	Employees' opinions on whether they met with a situation when they were treated worse on grounds of their gender at a present workplace.
Employees' opinions on whether appropriate measures exist in the company for dealing with sexual discrimination.	Indicator showing the percentage of people, who believe that a company has implemented a program to fight discrimination in treatment of employees and for the equal opportunity of both men and women according to employees filling in the questionnaire.
Statements by employees as to whether they were ever sexually harassed in the workplace.	Indicator showing the difference in women and men employees' opinions concerning sexual harassment in the workplace.
Employees' responses to the question of whether the company has implemented a program for victims claiming harassment or discrimination in the workplace.	Indicator showing the percentage of people who believe that the company has implemented a program for victims claiming harassment or discrimination in the workplace among employees filling out the questionnaire.

Source: Compilation on basis of [Monitorowanie równości... 2007].

The information given in the above Table shows a high degree of diagnostics of the organization areas particularly susceptible to discrimination practices. It allows for the possibility of utilising of the Gender Index at every stage of the implementation of the equal opportunities policy in a company (See: Table 1.)

In the confines of planning and decisions making, this tool may be utilised during an audit from a perspective of a present equality gender policy of a company, its programs and procedures.

In the case of implementation and organisation of actions, the identification of particular areas of unequal treatment on basis of gender will enable implementation of adequate remedies.

At the control stage and for effective assessment of actions being implemented, the index will be useful for in-house audits to analyse a company's situation from the perspective of women's and men's situation after the actions implemented. Moreover, as the Index enables an appraisal of a company in a numeric value form, thus it makes possible comparisons to other companies, enterprises. It enhances a competition and innovation of solutions in the equality sphere.

5. Conclusions

Nowadays, discrimination of employees within a labour market may mean a partial or total loss of benefits derived from their potential work efforts, and may also expose an employer to the possibility of legal costs in case of claims.

The implementation of an equal opportunities policy in an organization is a complicated and long process. It requires the necessity to put all employees into subordination, regardless of gender, and to maintain the same criteria concerning professional development, remuneration, work appraisal, and personal dignity. It also requires the formation of an equality organizational culture. It guarantees the creation of a work environment, where each and all employees, regardless of gender, is a valuable resource of an organization. Moreover, it constitutes a potential source of many economical advantages to an employer.

The Gender Index has been constructed for the needs of policy implementation process. It surveys the areas of the organization, in particular those susceptible to discrimination practices and serves as a workplace monitoring in the sphere of equal opportunities.

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