

## A MAINSTREAMING JOURNEY IN PORTUGAL

### ONCE UPON A TIME...

For most people working in EQUAL or mainstream ESF programmes, earlier Community Initiatives are almost lost in the mists of time. However to fully understand and value what projects have achieved throughout their developmental processes, it is really necessary to look back at their beginnings. This is particularly true for gender equality projects which continue to encounter stubbornly persistent obstacles. The success story of a Portuguese EQUAL project shows how many interlinked approaches and how much time and dedication it takes to tackle the major challenges of gender equality policies and to transfer good practices into mainstream policy making.

Once upon a time in the last century, in 1978, 1985 and 1992 to be exact, the General Federation of Portuguese Workers (Intersindical Nacional – CGTP-IN) made the multiple problems affecting women workers a priority at its national trade union conference. From these debates and from a series of meetings and seminars, a set of guidelines emerged for trade union action to promote gender equality in the labour market. In addition, in 1996, CGTP launched a project named LUNA under the NOW strand of the EMPLOYMENT Community Initiative. *“We believe”,* said trade union officials at the time, *“the road to equality should be built with concrete, coherent and articulated actions,”* and this is what happened in the LUNA project.



### A PROJECT CALLED LUNA

Over the course of four years, this NOW project orchestrated a number of different activities which took place in trade unions, enterprises and in key institutions such as CITE (the Commission for Equality at Work and Employment) and IDICT (the Institute for the Promotion and Inspection of Labour Conditions). All of its work was accompanied by a campaign targeting various groups – from youngsters in school to top level representatives of the organisations involved.

The first stage of the work was a thorough analysis of the working conditions and labour market situation of Portuguese women. The findings revealed a list of discriminatory practices which, although less prominent today, still persist as obstacles to equal treatment in employment. The following are examples of such practices:

- Even if women were often outperforming men in terms of educational attainments, employers preferred to hire men. Pregnancy and maternity leave were impediments to women enjoying the right to work;
- Women’s access to typical male jobs was, at that time, unthinkable;
- In terms of job profile and career progression, women always found themselves at the bottom of the hierarchy;
- Wage discrimination was strong. In some jobs, women earned between 20 and 30 percent less than men;
- Women were very sparsely represented in middle management and did not feature at all in senior management;
- Women formed the bulk of short-term and part-time workers and were often stuck in precarious employment;
- Women formed the majority of the unemployed;
- Women were always “forgotten” whenever enterprises organised in-house training.

In the next stage in the process, case studies were undertaken in 18 companies and two public authorities that operated in eight different economic sectors. Besides analysing official company documents on human resources management, the project team interviewed workers and trade unionists, discussed with trade union leaders, shop stewards and works committees and held regular meetings with HR staff. This exercise was not only useful during the NOW project, it also provided base-line data for future activities. All these enquiries fed into a final research report which confirmed the empirical knowledge about the discriminatory practices mentioned above. Obviously, the recommendations emphasised the need for positive action in Portuguese enterprises. These were negotiated with the representatives of the participating companies, the CGTP trade union officials responsible for the LUNA project, the experts from LUNA who were in charge of the respective economic sectors, the shop stewards' committee, the works council and the sector trade union leaders. This bargaining process gave birth to positive action protocols in 14 workplaces which were signed and implemented. The topics which they covered ranged from preferential recruitment of women if they possessed similar qualifications as their male competitors to training and continuing education for different female and male target groups. An important aspect of the protocols was company support for the implementation of existing legislation on job protection during pregnancy and maternity leave or on minimising the risk of accidents in the workplace. Actions were monitored and evaluated and the outcomes showed that a quantum leap had been taken and that LUNA had been a success for both the employees and employers.

The working situation for women changed positively and so did their work satisfaction and productivity. At the same time, attitudes concerning gender roles and stereotypes had gradually changed, and this applied to the women themselves, their male colleagues, the trade unionists and the company management.

In parallel, the project organised awareness raising and training for men and women leaders from the country's trade union organisations. The 12-hour modular seminars were offered nationwide and generated new insights and a lot of support for gender equality, in general, and current and future positive actions, in particular. Moreover, a training package for female trade unionists and shop stewards made a big difference in that it helped them develop their full leadership potential. Women felt empowered to take on senior positions and the unions began to value and use their competences. Last but not least a whole series of studies on female career paths, on gender aspects in collective bargaining and on family support services in Portugal prepared the ground for further action.

## BUILDING ON NOW ACHIEVEMENTS



EQUAL provided a unique opportunity to develop the strategies launched by LUNA. The first round Development Partnership (DP) [Agir para a Igualdade](#), whose work was also coordinated by the National Trade Union Federation (CGTP), aimed to implant a gender dimension in Human Resources policies and practices through collective agreements at company level. The dual strategy of Gender Mainstreaming was at the heart of the DP's approach. It introduced specific actions for women whilst, at the same time, it helped companies and trade unions to incorporate the gender dimension into all their operations. The project successfully negotiated 19 positive action plans to be implemented in companies and organisations throughout the country. These agreements were designed to promote the integration of women and men into sectors and occupations in which they were underrepresented and to dismantle gender discrimination in the workplace. The selection of the companies targeted by the DP mirrored that approach. About half of them were employing a predominantly male work force and the other half belonged in "feminised" sectors, where despite the overwhelming majority of employees being female, leadership positions were almost entirely in male hands.

The first step was a study of the job situation of women and men in each of the participating organisations. The results showed that in most enterprises and agencies, women suffered from discrimination, as a result of the same factors that the LUNA project had started to combat: restricted access to certain jobs; fewer opportunities for career development; lower pay for job categories where women were in the majority; loss of workers' rights, as a result of taking maternity leave; and offers of precarious short-term contracts, as distinct from permanent contracts. Some discriminatory practices were also discovered that affected all the employees,

both women and men, particularly in relation to levels of pay, precariousness of employment and the unsuitability of working conditions.

The findings were presented to the Management and Works Council in each organisation. At first, the employers refused to accept the existence of the discriminatory practices that had been detected. Unequal treatment was blamed on higher rates of female absenteeism resulting from the competing demands of their other roles as mothers and homemakers. However, two companies that had previously been partners in the NOW project were able to demonstrate how recruiting women with good educational credentials for technical jobs had greatly improved their companies' performance and productivity. This example of good practice provided by their peers helped the other employers to understand that gender equality was an integral part of personnel policies and could generate business advantages. As a result, they negotiated collective agreements with their Works Councils and relevant Trade Unions. Each of these agreements was based on a proposal developed by the DP that was subsequently tailored to the specific needs of the employees and employers concerned.

However, the project went even further by following up the different protocols. It found that these had, in many cases, led to breakthroughs in terms of complying with existing equality legislation and in combating some of the diagnosed discriminations. *“Over the years we have worked with 40 major companies and 400 shop stewards and trade union officials,”* says Odette Filipe, the head of CGTP's gender equality department, who emphasises that as a result of the projects' activities *“we have entered into a real social dialogue, focusing on the impact of maternity leave on women's career paths, more family friendly working time arrangements and, particularly, salary and bonus gaps between women and men.”* Odete also reported a success on the equal pay front. In 2000, a major trade company was found to have a 30% pay gap in the average salaries of workers. Thanks to the new social dialogue engendered by EQUAL, the gap was reduced to 7% by 2007, which meant better pay for 200 workers both female and male - and this is not the only success story. For both CGTP leadership and middle management, the process of learning about how to include the gender dimension into all their activities definitely provided added-value in terms of knowledge, skills and commitment. *“Gender equality has become a serious issue”,* says Odete and she elaborates *“even whilst the union prepared for strikes, the negotiations on equality plans kept going in the enterprises concerned.”*

Dissemination and mainstreaming of good practices and a wealth of tools for raising awareness and understanding of the concept of gender equality is still underway in a growing group of companies, in schools, in teachers' education and in training of trainer programmes.

## **VALUING WOMEN'S WORK: EQUAL PAY FOR WORK OF EQUAL VALUE**

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Despite the progress achieved, serious obstacles to gender equality remain, the most persistent being the gender pay gap. Thus in the second round of EQUAL, CGTP joined forces with the International Labour Organisation (ILO) in order to push for the implementation of the ILO Convention 100 [“Equal pay for work of equal value,”](#) in Portugal. The Lisbon ILO Bureau is a partner of the [“Revalorizar trabalho – promover igualdade”](#) project which, besides CGTP, also involves the Portuguese Trade Union Federation of Agriculture, Food, Beverages, Hotels and Tourism (FESAHT), the Association of Restaurants and Allied Trade Portugal (ARESP), the Committee for Equal Opportunities in Employment (CITE), the Research Centre for Social Interventions (CESIS) and the General Directorate for Labour Inspection.



## **CREATING A NEW JOB EVALUATION SYSTEM**

The DP chose the restaurant and catering sector as its field of activity. With 60% of women amongst its employees, this sector is a typical female domain, characterised by low pay and precarious employment. It is dominated by small enterprises with low productivity and high turnover and absenteeism. With the ageing of its female workforce, the sector has attracted young, mainly unregistered migrant women from Brazil and Cape Verde and, as a result, the average wage has dropped even lower. *“As a trade union we are worried about this state of*

affairs,” states Odete Filipe, whilst Maria Albertina Martins, who is the responsible partner from the employers’ side, confirms that her organisation is also concerned. *“We urgently need to professionalise the workforce in our sector,”* she says, *“after all this sector employs 60.000 workers, receives the highest number of unemployed people and offers jobs for people with many different qualification levels, including immigrants.”*

Together the partners are developing a job evaluation method that enables an assessment to be made of work content, requirements and conditions without gender bias and on that basis, they aim to modernise the sector’s occupational classification systems that goes back to the early 1970s. *“The idea is,”* explains Albertina Jordão from the ILO, *“to redress the undervaluation of certain occupations and to lay the ground for a new remuneration system based on transparent and gender-neutral criteria and procedures.”* The partners call what they currently do “an X-ray” of the sector. This exercise involves assessing the existing jobs using existing statistical data, questionnaires that are filled in by the employees and work-shadowing in a sample of enterprises. The latter is carried out by teams composed of employers’ and trade union representatives. It has not been easy to convince owners to welcome such a team into their businesses to observe their daily routines but the first results are already available. It appears that there are jobs that have very similar content but are paid at very different rates, depending on the dominance of women or men in that particular area of work. Odete gives an impressive example. The lowest ranking job in a restaurant is that of the “copeira” or, in other words, the kitchen assistant who is mostly female. She is in charge of ensuring that all the ingredients for the day’s menu are available and ready for preparation, the kitchen equipment and work environment are clean and meet hygiene standards and machines are properly maintained. In short, a responsible job with multi-faceted tasks that, although it can be quite repetitive, requires knowledge about food stuffs and occupational health and safety issues, organisational skills and a capacity to cope with high levels of stress when the restaurant is busy. The DP partners agree that this is a highly undervalued occupation, which reflects the multitasking unpaid work of women as homemakers. A male copeira would probably earn more, they reason, in many economic sectors which are not typical female domains multitasking is seen as capacity that adds to professional reputation – and income.

Once the “X-ray” of 660 workers and 40 restaurants is complete and evaluated, the most challenging part of the project will begin. The partners have formed a working group that is exploring a series of crucial issues: Which work factors are key elements in a job profile? How have these factors to be weighed when it comes to the re-evaluation of a job? How can the social partners use these new insights in the process of collective bargaining? Based on the ILO’s guiding principles, the plan is to allocate points that carry weight in a job profile. For a cook, for instance, that could be educational credentials, relevant vocational training plus acquisition of knowledge and skills in hygiene, and also work experience.



The partners are convinced that social partnership amongst unions and employers, which had been developing even before NOW and is now operating very effectively, will help to find a viable solution and also up-date the related vocational training. CGTP has a long tradition in supporting equality issues and in improving the situation of workers. ARESP can count on the growing interest of its member companies in a major professionalisation of the sector. Even if today, these companies do good business, with growing competition things may become more difficult in the future. Enterprises have begun to see the necessity of investing in people and now better pay and

better working conditions are gradually being recognised as being important elements in any strategy designed to build a loyal and productive staff.

## FROM POSITIVE ACTIONS TO GENDER MAINSTREAMING

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This Portuguese success story is not only an example of good practice when it comes to making project achievements sustainable and part of mainstream policies and practices. The journey that took more than a decade to travel reflects a developmental process that started out with positive actions for women and is now showing how the European dual approach to gender mainstreaming is being applied successfully. LUNA had focused entirely on preferential treatment

for women as a strategy to desegregate the labour market. The AGIR project had based its diagnosis on the situation of both women and men and linked gender mainstreaming in training and labour market activities to specific actions for women in work areas where gender gaps were particularly alarming. The most recent EQUAL project follows and develops that route in a very sophisticated way, within an economic sector that is facing huge challenges.

The ILO has realised the unique potential of the project's approach and cited it as promising pilot programme in its 2007 Global Report on the follow up to the ILO Declaration on fundamental Principles and Rights at Work. The most important outcome of this partnership is a training programme that enables trade unionists to use the new job evaluation system. Whilst CGTP-IN is carrying out this scheme for all its member unions, the ILO will integrate it into its training provision and offer it to trade unions in Portuguese speaking countries. It is to be expected that the new ESF programmes in Portugal and other EU Member States will learn from, and take advantage of, the achievements of the CGTP-IN gender equality champions.

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