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# Equality between men and women in employment and occupation

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## III - Job evaluation and classification

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### Pre-Release version

The current paper will be part of the European Implementation Assessment of the Directive 2006/54/EC ('Recast Directive') for the Committee on Women's Rights and Gender Equality FEMM, together with other analyses on the same issue.

### STUDY

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European Parliamentary Research Service

**Ex-Post Impact Assessment Unit**

March 2015 – PE 547.554



# **Research paper on the implementation of Directive 2006/54/EC with a focus on job evaluation / classification**

Research paper on the implementation of Directive 2006/54/EC on the principle of equal opportunities and equal treatment of men and women in matters of employment and occupation

## **Ensuring equal pay and equal access to employment through gender-neutral job evaluation and classification**

### **Research paper**

**by Prof. Dr. Isabell M. Welpe, Dr. Prisca Brosi and  
Dipl.-Psych. Tanja Schwarzmüller**

#### **Abstract**

This research paper analyses the implementation of Directive 2006/54/EC with a focus on job evaluation / classification. Applying research on gender stereotypes, it analyses 1) the current description of gender-neutral job evaluation / classification, 2) the application of gender-neutral job evaluation / classification for increasing female access to employment, decreasing the gender pay gap and improving occupational social security schemes, and 3) current actions of Member States, social partners, and equality bodies in promoting gender-neutral job evaluation / classification. Based on these analyses, recommendations on the enforcement of the Directive and the promotion of gender-neutral job evaluation and classification are provided.

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**The current paper will be part of the European Implementation Assessment of the Directive 2006/54/EC ('Recast Directive') for the Committee on Women's Rights and Gender Equality FEMM, together with other analyses on the same issue.**

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## **LINGUISTIC VERSIONS**

Original: EN

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Manuscript completed in March 2015. Brussels © European Union, 2015

PE: 547.554

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## Executive summary

Based on psychological and organisational research on gender stereotypes, this research paper analyses the implementation of Directive 2006/54/EC with a focus on gender-neutral job evaluation / classification.

In short, the description of job evaluation / classification currently includes

- The recommendation to use the same job evaluation system throughout the whole company
- Descriptions of job factors and sub-factors
- Descriptions how job factors and sub-factors should be weighed to derive a summary point score which should be connected to pay levels

Against the background of pertaining horizontal and vertical gender segregation, the gender pay gap and gender differences in occupational social security schemes, we provide the following recommendations on how the application of job evaluation / classification can be enhanced.

For **ensuring gender-neutrality of job evaluation / classification**, the description of gender-neutral job evaluation and classification systems in the Directive should be complemented by the following guidelines.

- In each organisation, an *evaluation committee* for conducting job evaluation / classification, which is *mixed-sex, trained, critical and accountable*, should be set up.
- Job evaluations should be made for all positions described by *gender-neutral job titles*, using *clearly defined* sub-factors generated from *structured free recall procedures*. They should be based on *standardized interviews* from various perspectives including both *male and female interviewees*, which should be translated into factor points by *several members of the evaluation committee*.
- Internal and external weighting should be controlled for gender-neutrality by means of a *weighting grid*.
- Job classification should be conducted by *blind assignment of point levels* to job classes (before job evaluation) and *checked* for gender-neutrality.

For **increasing female access to employment**, gender-neutral selection processes can be created by using job descriptions from job evaluation / classification for the following steps in the recruitment and selection process.

- Generation of *objective, behaviourally-based job descriptions*.
- Formulation of *gender-neutral job advertisements*.
- Creation of gender-neutral assessments of participants' competence including *work samples* and *behaviourally-anchored rating scales*.

For **reducing the gender pay gap**, the following steps should be taken in addition to increasing gender-neutrality in the application of job evaluation / classification.

- *Transparency on starting wages* should be increased and the *salience of gender* in pay negotiation processes should be reduced.
- The principles of gender-neutrality for job evaluation / classification should be transferred to *performance-based pay*.
- The notion of “*equal pay for work of equal value*” should include the notion of “*equal pay for equal performance*”.

**Governments, social partners and equality bodies in Member States** should

- Support the *preventive examination* of gender neutrality in pay schemes.
- Provide *clear and unambiguous guidelines* on the necessary steps to implement gender-neutral job evaluation / classification systems.
- *Governments should establish databases* including (sub-)factors and point ratings for specific jobs and occupations on national level and/or databases should be established on European level by the European Commission.

Recommendations on **strengthening the principle of equal pay through transparency** should include the *transparency of human resource processes*.

**Monitoring of the implementation of the Directive 2006/54/EC** should include

- *Surveys on the application of job evaluation / classification* in organisations across European countries.
- *Longitudinal examinations* of the implementation in discrete time intervals
- *Analysis of internal and external weighting* of factors and sub-factors on a national or European level.

## 1. Concepts and definitions of the Directive 2006/54/EC

In the following we will outline the basic concepts and definitions of Directive 2006/54/EC that are central to this research paper.

### 1.1 General description of the Directive 2006/54/EC

Directive 2006/54/EC was adopted by the European Parliament and the Council in July 2006. Its primary goal is to implement the principle of equal opportunities and equal treatment of men and women in matters of employment and occupation throughout the European Union.

### 1.2 Description of gender-neutral job evaluation / classification systems

Directive 2006/54/EC states that job classification systems for determining pay should be based on the same criteria for both men and women to avoid sex-based discrimination. In line with the description of job evaluation / classification included in Commission Staff Working Document SWD(2013)512, the Bauer report and the Commission Recommendations on Strengthening the Principle of Equal Pay between Men and Women through Transparency point out that Member States should promote the development and use of gender-neutral job evaluation / classification<sup>1</sup>. These documents recommend making use of analytical job evaluation methods that analyse and weigh different factors for every position. By analysing the same factors for every position, different positions (e.g., male- and female-typed ones) can be compared and adherence to the principle of “equal pay for work of equal value” can be ensured. The Commission Staff Working Document SWD(2013)512 advises to take into account the following four job evaluation factors (including their respective sub-factors): *Skills* (e.g., knowledge, interpersonal skills, problem-solving), *responsibility* (e.g., for people, goods, information, financial resources), *effort* (e.g., mental and psycho-social, physical) and *working conditions* (e.g., physical, psychological, emotional or organisational environment). After having identified the relevant factors and sub-factors, each of them should be weighted by assigning points relative to their importance for the organisation, meaning that the assigned points will be organisation-specific. Two types of weighting are necessary: (1) *external weighting*, determining the relative importance of each of the four factors with regard to the overall evaluation and (2) *internal weighting*, determining the relative importance of each of the different sub-factors with

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<sup>1</sup> The Bauer report further recommends training women on job classification, asking sectors and companies to examine if their job evaluation / classification is gender-neutral and asking Member States to carry out assessments focusing on female-dominated professions. These recommendations are not included in the commission recommendations on strengthening the principal of equal pay between men and women through transparency.

regard to their respective factor. Based on the weighting of factors and sub-factors, each job is assigned a certain number of points. Jobs with similar amounts of points are then classified into groups, which are finally connected to pay levels.

In order to ensure that job evaluation / classification is actually gender-neutral, the Commission Staff Working Document SWD(2013)512 recommends the following: Using the same job evaluation system throughout the whole company and for male- as well as female-dominated jobs, including both typically male as well as typically female requirements, evaluating male- and female-typed requirements according to their real value for the organisation, assessing the same requirement only with one instead of multiple criteria, defining requirements as unambiguously as possible and evaluating requirements closely.

In order to evaluate the success of Directive 2006/54/EC, we will follow a quantitative and qualitative approach and analyse six different focus countries (Germany, France, Malta, Latvia, Sweden, United Kingdom) which have been chosen based on several equality-relevant criteria (i.e., vertical and horizontal access to employment, gender pay gap)<sup>2</sup>.

## **2. Quantitative analysis of the implementation of the Directive 2006/54/EC**

First, we will analyse how access to employment, working conditions and occupational social security schemes have developed in the period from 2005 (before the entry into force of the Directive) to 2013 (newest available data) based on official data from the EU (Eurostat, 2014). Even though developments over time cannot be interpreted in a causal way (e.g., by directly attributing improvements with regard to the gender pay gap to the implementation of the Directive) these data enable us to assess whether the situation in our six focus countries (and the EU as a whole) has improved since the entry into force of the Directive.

### **2.1 Access to employment**

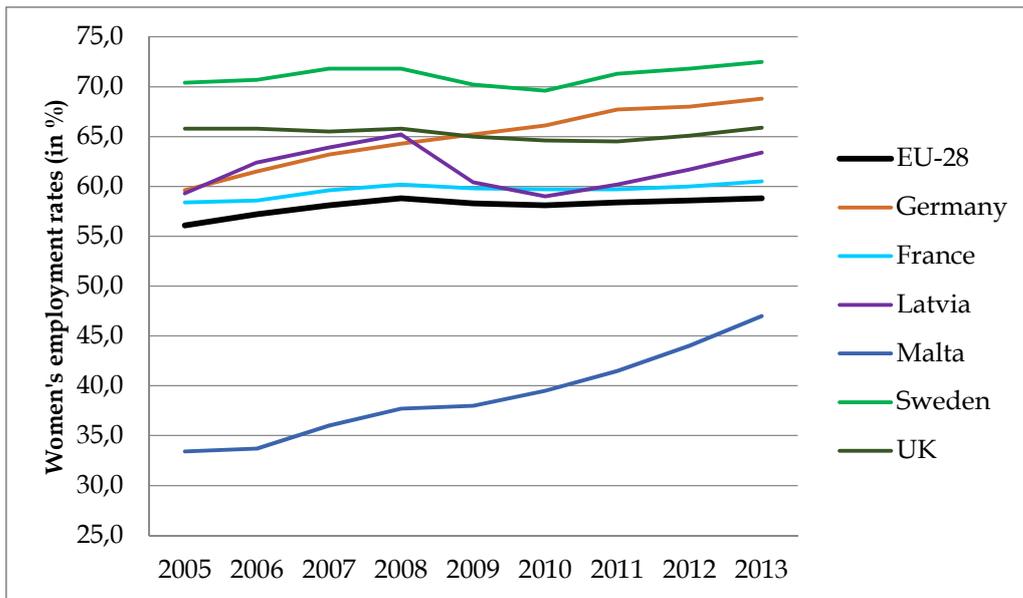
#### **2.1.1 Women's employment rates**

Figure 1 shows how women's employment rates have developed over time<sup>3</sup>.

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<sup>2</sup> For a detailed overview about the methodological approach of this research paper, please see Annex I.

<sup>3</sup> Data on EU-level refer to EU-28 if possible; if data for EU-28 are not available, we will refer to EU-27 instead; data include persons aged 15 to 64 years, if not indicated otherwise.



**Figure 1: Women's employment rates (2005-2013)**

The data indicate that women's employment rates have remained relatively stable over time, with a slightly positive trend in recent years. Women's employment rates have increased most strongly in Malta (13.6 % from 2005 to 2013), whereas there has been a temporary decline of women's employment in Latvia. Sweden and Germany show the highest absolute employment rates for women.

### 2.1.2 Vertical segregation - Percentage of female board members

Figure 2 shows the degree of horizontal segregation, i.e., the representation of women in high-ranking leadership positions (on corporate boards).

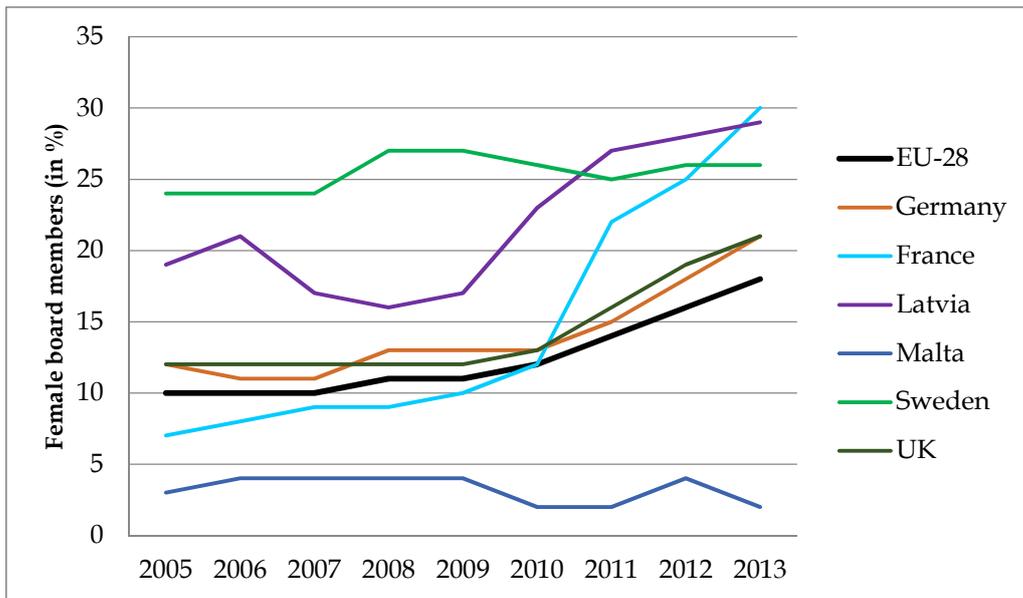


Figure 2: Percentage of women on boards (2005-2013)

Despite still being below 30%, the percentage of women on boards has substantially increased during the observed time span in all focus countries except for Malta (with the largest increase occurring in France: 23.0 %). Currently, Sweden, Latvia and France have the highest percentage of women on boards.

### 2.1.3 Horizontal segregation - Employment rates in male- and female-typed domains

Figure 3 displays horizontal segregation of the labour market, i.e., the percentage of women's representation in male-dominated (e.g., mechanic, engineer), neutral (e.g., finance professionals) and female-dominated (e.g., service clerk, nurse) professions throughout the EU-27 in the year 2010 (European Union, 2014)<sup>4</sup>.

<sup>4</sup> Data on horizontal segregation could not be found on a national level.

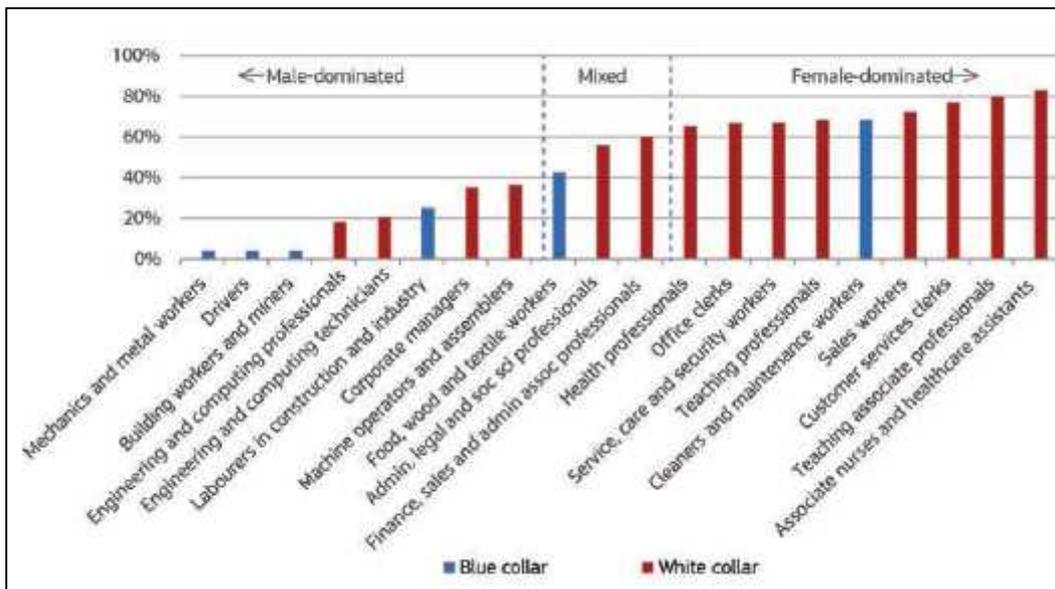


Figure 3: Percentage of women in male-dominated, neutral and female-dominated professions throughout the EU-27 (2010)

As can be seen from these data, there still is considerable gender segregation in Europe. In total, only 16 % of all employees work in “gender-neutral” (i.e., mixed sex) occupations. Thus, men and women continue to choose or be selected into different jobs.

## 2.2 Working conditions

### 2.2.1 Gender pay gap

Figure 4 displays the development of the gender pay gap over time<sup>5</sup>.

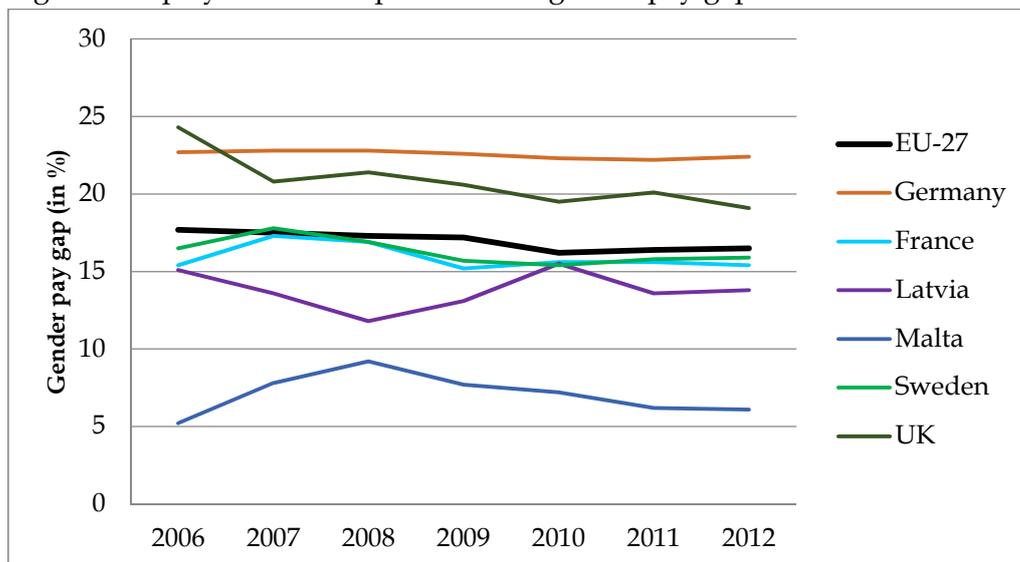


Figure 4: Gender pay gap (2006-2012)

<sup>5</sup> Data on the gender pay gap are only available for the time span between 2006 and 2012.

As can be seen, the gender pay gap has remained relatively stable over time, with the largest decrease in the UK (5.2 %). The UK and Germany have the highest gender pay gaps of all focus countries, whereas pay differences between the sexes are relatively low in Malta.

### 2.2.2 Part-time employment

Figure 5 displays the development of women's part-time employment over time.

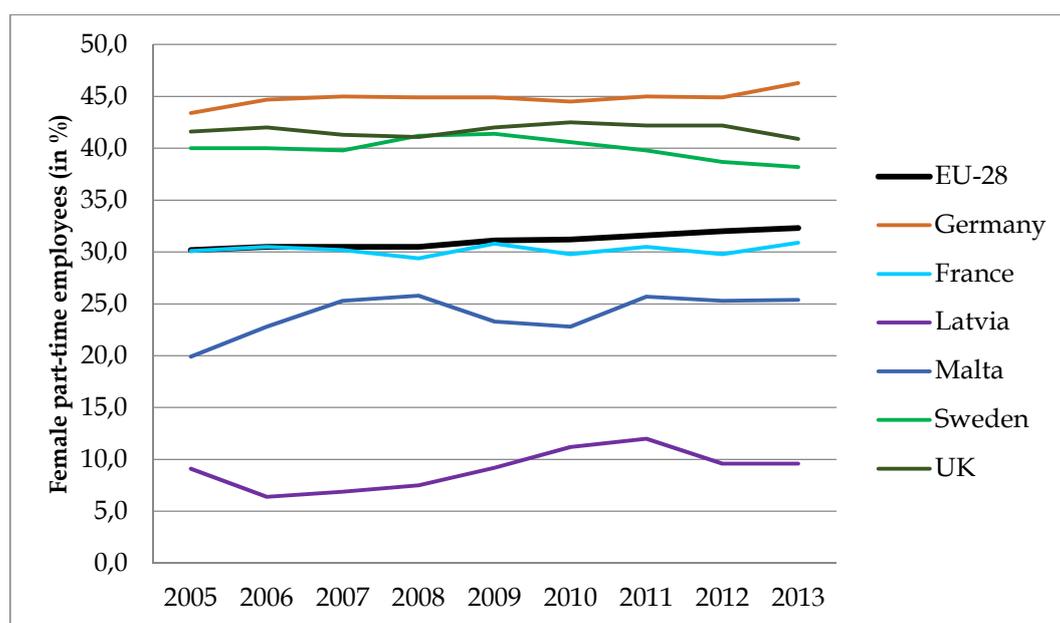


Figure 5: Percentage of female part-time employees (2005-2013)

By trend, the percentage of women working part-time has increased over time, with the strongest increase occurring in Malta (5.5%). The percentage of women working part-time is generally highest in Germany and UK.

### 2.3 Occupational social security schemes

Figure 6 shows the difference in relative income between male and female retirees (persons aged 65 or older).

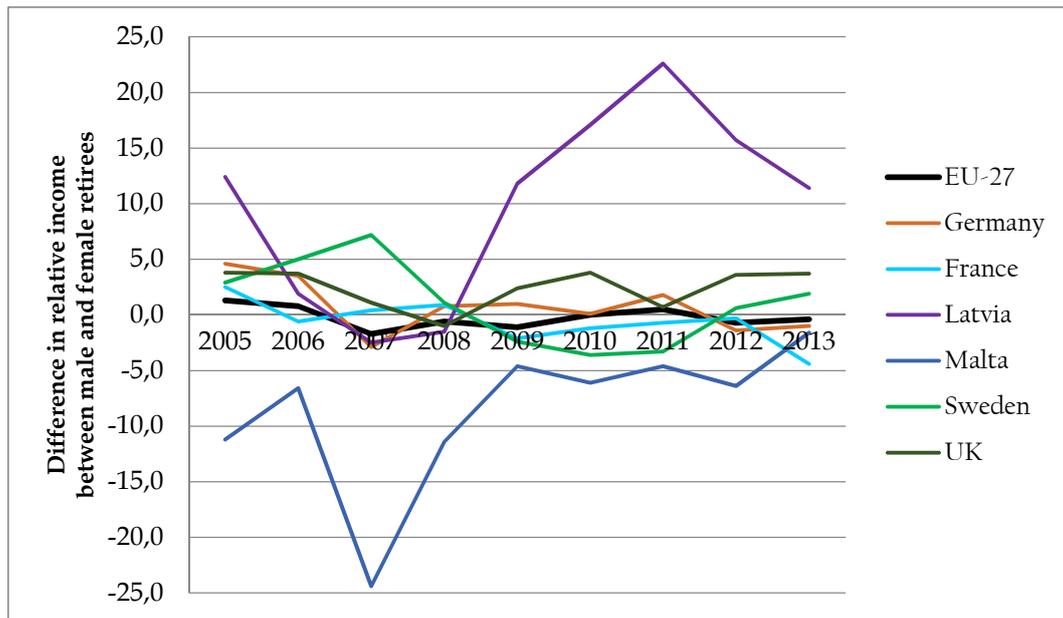


Figure 6: Difference in relative income between male and female retirees (2005-2013)

Whereas in 2005, female retirees were more likely to have a lower income than male retirees in all focus countries except for Malta, this pattern had changed in 2013, when income rates were already more similar between the sexes. Only in Latvia, women today still have a much lower income as retirees than men (11.4 %).

## 2.4 Conclusion

The quantitative data outlined above indicate that for the EU as a whole, progress has been made with regard to women’s general employment rates, women’s representation on boards, and income-differences between men and women in old age. Despite this general progress, especially vertical and horizontal segregation remain on relatively high levels and the gender pay gap still persists. The data also show that there are large differences between the focus countries. Whereas the gender pay gap is currently (as of 2012) still on a high level in Germany (22.4 %), it is way lower in Malta (6.1%). In contrast, whereas all other focus countries have increased the percentage of female board members over the past years, Malta has not made progress in this regard (women’s representation on boards remains on a low level: 2.0 % in 2013).

## 3. Implementation and enforcement of the Directive 2006/54/EC with regard to job evaluation / classification

As outlined above, it is difficult to evaluate the success of the implementation of the Directive on a quantitative basis. Therefore, we will now qualitatively analyse the implementation of the Directive (a) from a scientific point of view and (b) by analysing the activities of relevant stakeholder groups (ministries, equality bodies, trade unions, employer representations) within the specific focus countries.

### **3.1 Evaluation of job evaluation / classification as described in Commission Staff Working Document SWD(2013)512**

In the following sections, we will comment on Commission Staff Working Document SWD(2013)512 accompanying the Commission report on the implementation of Directive 2006/54/EC from the scientific perspective of research on gender stereotypes. The literature defines gender stereotypes as widely shared expectations about the competencies and traits of men and women. Whereas men are usually assumed to be *agentic* (i.e., decisive, independent, forceful), women are seen as *communal* (i.e., nice, caring and sensitive). With these gendered trait ascriptions also come expectations about the social roles men and women are suited for: Whereas men are seen as a good match for high-status roles such as leadership, women are seen as more adept for interpersonal roles such as nurse or teacher (Eagly & Karau, 2002; Heilman, 2001; Schein, 1973, 2001). Thus, expectations about the traits and capabilities of men and women may produce biased evaluations of their respective competencies.

In a similar vein, studies (e.g., Eckes, 2002) have shown that expectations about “typical men” and “career men” are highly similar (with both being characterized by high competence, but only moderate social warmth), whereas expectations about “typical women” and “career women” strongly diverge (with typical women usually seen as high in social warmth, but relatively low in competence, and career women seen as quite competent, but very low in warmth). Thus, by being competent, women lose perceived communality, which in turn often leads to social backlash (e.g., being seen as hostile and therefore being unlikely to be hired or promoted; Heilman, Wallen, Fuchs, & Tamkins, 2004). To sum up, gender stereotypes often lead to indirect discrimination against women.

#### **3.1.1 Benefits of the outlined approach to job evaluation / classification**

Several of the measures for gender-neutral job evaluation / classification outlined in the Commission Staff Working Document SWD(2013)512 accompanying the Commission report on the implementation of Directive 2006/54/EC are highly valuable from a scientific point of view. *Analytical approaches* to job evaluation bear less potential for gender biases than non-analytical (i.e., global) ones as they reduce the ambiguity within the job

evaluation process. Ambiguity has been reliably demonstrated as a condition fuelling the application of gender stereotypes (Heilman, 2001, 2012). In the same vein, the suggestion of a *clear definition of factors and sub-factors* reduces the ambiguity of the evaluation criteria. Utilising all defined factors for every position in the company and developing only *one job classification system* for the whole company is also in line with scientific recommendations as it avoids shifting standards for different positions (Murtha, 1993). As recommended, different *sub-factors* should *not overlap* (Weiner, 1991) and both *male- and female-typed factors* should be considered in order to avoid overvaluation of male-typed and undervaluation of female-typed jobs (Murtha, 1993). Finally, *gender-neutral job titles* should be chosen in order to encompass both male- and female-typed factors.

### **3.1.2 Further steps to avoid gender biases in job evaluation / classification**

Even though the measures for designing job evaluation / classification systems outlined above provide viable ways to reduce the influence of gender bias, there are additional aspects on various stages throughout the job evaluation and classification process that should be taken into account in order to ensure gender-neutrality. The main point of improvement from a gender stereotypes perspective is to reduce the ambiguity currently inherent in the process by giving more specific guidelines for implementing gender-neutral job evaluation / classification. These specific details necessary for avoiding indirect discrimination during job evaluation will be outlined below.

#### **3.1.2.1 Establishment of the evaluation committee**

Developing a job evaluation / classification system usually starts by establishing an evaluation committee executing the entire process. In order to ensure that there will be no gender biases introduced by the evaluation committee, several aspects have to be considered.

Sex distribution of the evaluation committee: As outlined by a recent meta-analysis, male raters show stronger gender biases than female ones (Koch, D’Mello, & Sackett, 2014). Therefore, it is crucial that the sex distribution of the evaluation committee is balanced. This also carries the advantage of reducing the perceived maleness of the overall setting (Eagly, Karau, & Makhijani, 1995), which might beneficially affect the following process.

Training of the evaluation committee: In addition, the evaluation committee should be trained with regard to gender-neutral job evaluation / classification. As stereotyping is usually an unconscious process (Greenwald & Banaji, 1995) raising awareness about stereotypes is generally important and necessary to motivate subsequent changes of behaviour (Sanchez & Medkik, 2004). Therefore, members of the evaluation committee have to be taught how the influence of

gender biases can be avoided in job evaluation / classification (Murtha, 1993). Short but comprehensive checklists (such as provided by Belgium's Institute for the Equality of Women and Men, 2010) that can be handed out to members of the evaluation committee provide a good way of distributing necessary information.

Assigning the role of devil's advocate: As outlined above, biases are unconscious rather than conscious processes (Greenwald & Banaji, 1995). Yet even when people are made aware of their existence, they still tend to have a "bias blind spot" (Pronin, Lin, & Ross, 2002). This means that people are often unable to recognize their own biases – but can see their influence in the evaluations given by others. Therefore, it makes sense to strategically name one or two of the committee's members devil's advocate, whose role it is to critically assess whether processes and criteria are gender-neutral or not.

Enhancing accountability: Finally, the evaluation committee should be made aware of the fact that it will have to justify its evaluation decisions in front of an external party after having completed the process (Brtek & Motowidlo, 2002). Enhancing perceived (and actual) accountability is important as it has been shown to increase raters' motivation to look at decisions carefully and to avoid stereotyping (Koch et al., 2014).

### **3.1.2.2 Generation of job descriptions**

After the evaluation committee has been set up, job descriptions for all the positions in the company need to be developed. In order to do so, factors and sub-factors are selected. Then qualitative information on job positions is obtained for each one of those sub-factors, on the basis of which ratings on sub-factors for each job position are made. In every step of this process, certain details have to be considered in order to ensure gender-neutrality:

Use of neutral job-titles for all positions: The job-titles of all positions should be framed in a *gender-neutral* way. It is also important to *avoid status-related titles* as these will similarly trigger biased evaluations (so that a 'customer services assistant' might be evaluated as possessing lower overall responsibility than a 'customer services officer'; Equality and Human Rights Commission, 2014; Smith, Hornsby, Benson, & Wesolowski, 1989).

Preselection of factors and sub-factors central to all positions in the company: As outlined in the Commission Staff Working Document SWD(2013)512, it is important to have a single, company-wide job evaluation system, which encompasses the following factors: Skills, responsibility, effort, and working conditions. Each of these factors has to be further divided into sub-factors, which need to be determined within the job evaluation process. The Commission Staff Working Document SWD(2013)512 outlines that these sub-factors themselves

need to be gender-neutral. However, research has already shown that sub-factors usually are not gender-neutral: Whereas for example interpersonal skills are typically seen as female-typed (Heilman, 2012), problem-solving is seen as a rather male-typed skill (Atwater, Brett, Waldman, DiMare, & Hayden, 2004; Martell & DeSmet, 2001). In order to ensure that the selected sub-factors are gender-neutral in sum, it is therefore necessary to include all relevant sub-factors for both male-typed and female-typed factors (Eagly & Karau, 2002).

To do so, *structured free recall* procedures (Baltes, Bauer, & Frensch, 2007; Bauer & Baltes, 2002) should be used when developing company-wide sub-factors. For each factor (e.g., skills), first female-typed (e.g., interpersonal competencies), then male-typed (e.g., analytical problem solving) potential sub-factors should be collected strategically. To ensure that these are representative for all positions in the company, several exemplary male- and female-typed positions ought to be used as examples during this procedure (Weiner, 1991). Such methods would safeguard the implementation of the Commission Staff Working Document Commission Staff Working Document SWD(2013)512's advice to take into account both male-typed and female-typed sub-factors.

Once an encompassing list of potential company-wide sub-factors has been developed, it is important to reduce the potential ambiguity of these sub-factors. Each one should receive a *clear definition* in order to avoid evaluators having to rely on their 'gut feeling' when assessing whether it is relevant for a position at hand or not (Heilman, 2012). This definition should break down the rather global sub-factors, which are hard to evaluate (e.g., interpersonal competencies), into more specific behaviours (Flanagan, 1954; Lance, Lambert, Gewin, Lievens, & Conway, 2004). *Examples* for both male- (e.g., negotiating with suppliers) and female-typed behaviours (e.g., calming down upset customers) representing the respective sub-factor should be given (in alphabetical order instead of male-first; Murtha, 1993; Weiner, 1991).

Finally, for each sub-factor, different requirement levels have to be defined. These levels should also be assigned clear labels to facilitate evaluation and reduce ambiguity (e.g., for interpersonal competencies: 1 = *needs to interact only rarely with other people, such as colleagues, customers or suppliers, existing interactions are only of minor importance to the company*; 7 = *successful interaction with other people, such as colleagues, customers or suppliers is extremely frequent and relevant for the company's success*; for further examples, please see International Labor Office, 2008, p. 37). To further ensure gender-neutrality, male- and female-typed sub-factors should have the same number of levels (Equality and Human Rights Commission, 2014)

Collecting standardized data for specific positions: To assess specific positions' sub-factor requirement levels, literature on gender stereotypes recommends questioning several persons familiar with the position: Current position holders, their colleagues and leaders (Heilman, 2012; Murtha, 1993). If possible, *both male and female interview partners* should be chosen to ensure a balanced point of view – men and women might talk differently about their positions (Murtha, 1993). To collect the data, *structured interviews or structured questionnaires* ought to be used (for examples, see International Labor Office, 2008, pp. 44ff). To restrict the influence of biases, closed-ended questions are the method of choice – even though a preceding thorough search for company-wide sub-factors, as described above, is crucial (Murtha, 1993).

Assessing the degree to which a specific position requires different levels of sub-factors: Finally, based on the answers of the interviewees, the *levels* of the different sub-factors required for a position (described by gender-neutral job titles) should be determined based on the qualitative information retrieved from structured interviews. In order to reduce subjectivity, ratings should be done by several members of the evaluation committee, who should subsequently reach consensus by discussing diverging ratings (Arvey, 1986).

### **3.1.2.3 Internal and external weighting of factors**

After factors and sub-factors have been defined and their position-specific levels have been determined, weighting has to take place. After external weighting, i.e., the determination of the relative importance of each of the four factors with regard to the overall evaluation, internal weighting, i.e., determining the relative importance of each of the different sub-factors with regard to their respective factor, should follow. As outlined in the Commission Staff Working Document SWD(2013)512, this weighting process has to occur in a bias-free way – which is, however, challenging as weighting is a highly subjective process. Nevertheless, there are several means by which indirect discrimination during weighting can be reduced.

Development of a weighting grid: The determined factors and sub-factors need to be assigned points relative to their importance for the mission of the company. Using a total of 1000 points is generally recommended. In order to distribute them, the four main factors first have to be ranked (i.e., how important are skills, responsibility, effort and working conditions for the organisation?). After this first ranking, these factors will be assigned a relative weight (i.e., a percentage). Experts recommend assigning 20% to 35% for qualifications, 25% to 40% for responsibility, 15% to 25% for effort and about 5% to 15% for working conditions. Afterwards, the same procedure (ranking and distribution of percentages) should be repeated for the sub-factors (International Labor Office, 2008, pp. 69ff).

Checking the weighting grid for gender-neutrality: As outlined in the Commission Staff Working Document SWD(2013)512, the weighting grid's gender-neutrality needs to be checked. While the Commission Staff Working Document SWD(2013)512 does not state explicitly how this can be done, research suggests the following method: The mean percentages assigned to male-typed versus female-typed sub-factors should be analysed. In case of differences in the weighting of male-typed and female-typed sub-factors (with on average, for example, 15 % assigned to each male, but only 11 % to each female sub-factor), these should be critically questioned and it should be checked whether these can actually be justified (a process that while not eliminating gender bias, does reduce it; International Labor Office, 2008, pp. 69ff). This procedure could, e.g., ensure that responsibility for people is rated as highly as responsibility for financial resources (as requested in the Commission Staff Working Document SWD(2013)512 and the Bauer report).

#### **3.1.2.4 Assignment of points to jobs and job classification**

After the distribution of points to sub-factor levels has taken place, the final steps of job classification have to be implemented in a gender-neutral way.

Assignment of points to jobs: Based on the specific points just assigned to the sub-factor levels, a point value for each position in the company can be determined (e.g., a secretary might be assigned 342 of 1000 available points; International Labor Office, 2008, pp. 77ff). As gender-stereotypes tend to influence the interpretation of available information, this mathematical procedure (summing up points) is an adequate way of reducing the potential effects of biases at this stage (Heilman, in press; McCarthy, Iddekinge, & Campion, 2010).

Job classification: After point values have been assigned to each job, jobs with similar point values will be grouped into classes of similar value – a process called job classification. The design of the job classes offers a lot of ambiguity – and therefore a high potential for biased decisions. Substantiating this notion, research has shown that job classification often only corresponds loosely to the points assigned to specific jobs beforehand (van Sliedregt, Voskuil & Thierry, 2001). Evaluators might redefine job classes in accordance with gender stereotypes (Uhlmann & Cohen, 2005) – assigning a lower pay class to female-typed jobs and a higher pay class to male-typed jobs, even though the respective number of points assigned to them is actually similar. In order to avoid this redefinition of pay classes and to support the European Commissions' striving for equal pay as expressed in Directive 2006/54/EC, it would be advisable to *assign point levels to job classes before* starting the evaluation process. In addition, it should be checked whether female-typed jobs tend to end up at upper *interval boundaries* whereas male-typed jobs tend to end up at lower interval boundaries

as this might indicate biases (i.e., undervaluation of female- and overvaluation of male-typed jobs; International Labor Office, 2008, p. 69).

## **3.2 Evaluation of job evaluation / classification with regard to access to employment, working conditions and occupational social security systems**

### **3.2.1 Access to employment**

Although gender-neutral job evaluation is mainly advocated for reducing the gender pay gap, it can also be the basis for equal access to employment for men and women. In the following, we will outline how results of the job evaluation processes can be applied to enhance gender-neutrality in the personnel selection processes. Additional and more detailed information about gender-neutral personnel selection processes can be found in Welppe, Brosi and Schwarzmüller (2014) and Schwarzmüller, Brosi and Welppe (forthcoming)<sup>6</sup>.

#### **3.2.1.1 Gender neutral job descriptions**

Connecting job evaluation with personnel selection processes, the factors and sub-factors developed for all positions in a company need to be translated into very clear, objective job descriptions for personnel selection in a specific position (Viswesvaran, Ones, & Schmidt, 1996).

Developing behaviourally-based job descriptions: To do so, literature has consistently recommended using *behaviourally-based* instead of competency-based *job descriptions* (Flanagan, 1954; Lance et al., 2004). This would mean defining - based on the interviews with current position holders, their colleagues and their leaders conducted during job evaluation - which behaviours characterise someone having high levels of a certain skill (e.g., interpersonal competency) in the specific position to be filled. For a secretary, interpersonal competency might include behaviours such as efficiently calming upset managers or dealing in a friendly and professional way with requests made under time-pressure. In contrast, for a mechanic, interpersonal competency might mean carefully analysing customers' concerns or working together effectively with colleagues when repairing a machine. Thus, developing a clearly defined job description - encompassing all behaviours relevant for successfully filling the open position - reduces ambiguity about the skills required for the position (Heilman, 2012).

#### **3.2.1.2 Designing gender-neutral job advertisements**

After having derived a gender-neutral job description, this has to be translated into a gender-neutral job advertisement. Gender-neutral job advertisements reduce the perceived maleness of the position (Gaucher, Friesen, & Kay, 2011), making women more likely to apply for them (Horvath & Sczesny, 2015a) and

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<sup>6</sup> Articles available from the authors on request.

evaluators more likely to hire them (Horvath & Sczesny, 2015b). Thus, by getting more women into the applicant pool, women's token status is reduced (i.e., high salience due to being one of few women in a group of applicants; Heilman, 1980), especially in male-typed professions. In addition to using the gender-neutral job titles from job evaluation, job advertisements can be made gender-neutral by doing the following.

Making use of gender-neutral overall wording: Job advertisements can also be made gender-neutral by using *gender-neutral overall wording* (Gaucher et al., 2011). Gender-neutral overall wording refers to a balanced use of agentic (e.g., "independent, decisive, strategic") and communal (e.g., "empathic, team, together") words throughout the job advertisement (Gaucher et al., 2011).

### **3.2.1.3 Assessments of applicants' competence**

A crucial point in personnel selection processes is the assessment of applicants' competence. Thereby, results from job evaluation provide the basis for creating assessments which reduce biases from gender stereotypes.

Designing the right work samples: Studies have consistently shown that having more information about applicants' job-relevant competencies reduces ambiguity and thereby stereotyping (e.g., Heilman et al., 2004). As work samples have been characterized as a good tool to *get individualised information about applicants' work-related competencies* (Blickle, 2011), they should be used in addition to selection interviews. Work samples should be strongly related to results of job evaluations, and should provide the opportunity to evaluate whether applicants are able to show the behaviours identified as necessary for success beforehand.

Use of behaviourally-anchored rating scales: To reduce ambiguity with regard to the evaluation criteria, there should be *behaviourally-anchored rating scales* for each criterion to be judged (Macan, 2009). Thus, which types of behaviour are seen as little versus highly interpersonally competent should be defined and recorded beforehand, based on results from job evaluation. Behaviourally-anchored rating scales should be used for both the assessment of *work samples* and in *highly structured interviews* in which both the questions themselves and their sequence are standardized (Bragger, Kutcher, Morgan, & Firth, 2002). Moreover, all evaluators should be *trained* to ensure a common understanding of the evaluation criteria (Woehr & Huffcutt, 1994).

## **3.2.2 Working conditions focusing on pay**

We will focus on pay within working conditions, because as outlined by the Commission Staff Working Document, job evaluation / classification mainly targets at tackling the gender pay gap. For this purpose, its application in the context of working conditions including pay seems to be straightforward:

Employees with the same job classification should be assigned to the same pay level.

However, this connection might be more problematic than it seems. Recall that job evaluation builds on factors such as required skills, responsibility, effort and working conditions of the job position. Thus, job evaluation refers to the inputs which are necessary for fulfilling a position. In contrast, organisations often aim to connect pay to the necessary (expected) outcomes, i.e., performance. Specifically, pay fulfils an incentivising effect in organisations, which refers to the impact of pay on employees' motivation in order to increase their performance (Gerhart, Rynes, & Fulmer, 2009). This incentivising effect is used for motivating prospective employees to enter the organisation and for motivating existing employees to exert effort and achieve working goals. Within the following sections, we will describe why and how these effects appear to be threats to gender equality, and describe potential remedies.

### **3.2.2.1 Starting pay negotiations**

Women are less likely than men to initiate negotiations for starting pay (Babcock, Laschever, Gelfand, & Small, 2003). In consequence, it is not surprising that women have been found to have lower starting pay than men (Gerhart & Rynes, 1991). These gender differences are severe as they have been shown to significantly influence subsequent pay levels (Harris, Gilbreath & Sunday, 2002). Against this background, it has been proposed that women should be trained in negotiation skills (e.g., see the Bauer report) and platforms such as the Austrian wage calculator<sup>7</sup> aim to create transparency on wages in order to enable women to start pay negotiations. But although these measures are valuable in raising women's awareness about the importance of negotiating their starting pay, research shows that women are confronted with social backlash for initiating pay negotiations (Bowles, Babcock & Lai, 2007; the effect of social backlash is described in section 3.1.). Thus, as long as organisations do not create circumstances which reduce the risk of social backlash for women who start negotiations, these measures will not be effective. In order to create such circumstances, organisations can do the following:

Reduce structural ambiguity: Research shows that reducing structural ambiguity, i.e., enhancing both parties' understanding about the economic circumstances of a negotiation, reduces the influence of gender stereotypes (Bowles, Babcock, & McGinn, 2005). These circumstances relate to factors such as the knowledge of average wages and wage limits. Thus, creating transparency in negotiations about starting pay in terms of average wages and wage limits helps to reduce

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<sup>7</sup> <http://www.gehaltsrechner.gv.at/>

structural ambiguity. Not only women need this information, especially their negotiation partners should be made aware of it in order to reduce the risk of social backlash.

Reduce the salience of gender: Another factor which increases the probability that initiating a negotiation is followed by social backlash for women is the salience of gender (Kray, Thompson, & Galinsky, 2001). A situational circumstance making gender salient is for example women's token status, i.e., situations in which there are only few women in a group of applicants (Heilman, 1980). Thus, increasing the number of female applicants is not only a desirable outcome itself, but also supports organisations in reducing the gender pay gap.

### 3.2.2.2 Performance-based pay

Performance-based pay reduces the strength of the connection between job classes and pay, turning job evaluation / classification into a less powerful tool for reducing the gender pay gap. This circumstance has so far been broadly acknowledged (e.g., Equality and Human Rights Commission, 2010) but recommendations on how gender equality can be promoted in performance-based pay schemes are still missing. However, recommendations can be given for increasing gender-neutrality in performance-based pay, which parallel the recommendations for increasing gender-neutrality in job evaluation / classification.

Reducing gender-stereotypic influences in performance assessments: In general, performance assessments are based either on *behaviour-based criteria*, e.g., supervisor ratings, or *outcome-based criteria*, e.g., productivity, sales volume, and profitability (Rynes, Gerhart & Parks, 2005). Outcome-based criteria are more objective than behaviour-based criteria, but are often not available or do not cover all performance domains of a position. Therefore, many organisations use subjective criteria, which can be influenced by gender stereotypes, resulting in women being judged as performing less well than men (e.g., Joshi, Son, & Roh, in press). A powerful remedy for reducing the influence of stereotypes in performance evaluations is *reducing ambiguity* (Heilman, 2012): *Increasing the quantity and quality of information about performance, increasing the clarity with which performance can be attributed to women and men, increasing the clarity of evaluation criteria, and increasing clarity about the way in which evaluation criteria should be combined to an overall performance assessment* are therefore ways to reduce the influence of gender stereotypes.

Connect performance with performance-based pay: A recent meta-analysis shows that gender differences in rewards (including salary, bonuses and promotions) are fourteen times higher than gender differences in performance assessments (Joshi, Son, & Roh, 2015). This finding highlights the importance of

connecting performance-based pay with performance. This principle is further stressed by research showing that leaves or absences, i.e., the usage of family-friendly policies, can lead to long-term consequences in terms of lower salary increases even when controlling for performance (Judiesch & Lyness, 1999). Although this result pertained to men and women, women are more likely than men to make use of gender-friendly policies (e.g., Greenhaus & Powell, 2006). In consequence, especially those measures aiming to support women may backfire, as they might increase the gender pay gap when pay is not firmly connected with performance, such as when managers are given discretion about the allocation of performance-based pay (Rynes, Gerhart & Parks, 2005). Thus, parallel to connecting pay with the results of job evaluations, performance-based pay should be clearly connected with performance criteria.

### **3.2.3 Occupational social security schemes**

In general, it is difficult to make recommendations on social security schemes because of the diverse nature of occupational security systems throughout the Member States (see Burri & Van Eijken, 2013, p. 15f). Furthermore, job evaluation / classification is usually not directly related with occupational social security schemes, but may indirectly influence occupational social security schemes to the extent that social security schemes are tied to pay. To the same extent, the provided qualitative assessment of the gender pay gap also relates to social security schemes.

## **4. Implementation of job evaluation / classification in the EU**

In order to qualitatively assess the current application of job evaluation / classification in the EU, we will examine the application of job evaluation / classification in organisations, the enforcement of job evaluation / classification by governments, the promotion of job evaluation / classification by social partners and the promotion of job evaluation / classification by equality bodies.

### **4.1 Implementation of job evaluation / classification in organisations**

Comparative analyses of the implementation of job evaluation / classification in organisations are so far scarce. The best data are available for the United Kingdom and show the following points: First, whereas 80% of organisations in the public / voluntary sector make use of formal job evaluation schemes, only about half of the organisations in the private sector (49%) use formal job evaluation schemes (E-reward, 2007). Second, of those organisations using formal job evaluation schemes, 53% use explicitly weighted point-factor schemes and 61% apply progressive (geometrical) scoring systems (E-reward, 2007). Third, across positions, i.e., senior management, middle management, professional,

sales, administration or production, about half of respondents judged their job evaluation scheme as ineffective in carrying out the compensation philosophy and/or the purpose of their job evaluation (WorldatWork, 2009). Fourth, job evaluation schemes are widespread in large organisations, but relatively rare in small organisations with fewer than 250 employees (El-Hajji, 2011).

These points provide first indications, but extrapolating from these results to other countries in the EU is difficult, because although job evaluation / classification schemes are well promoted by the government and the equality body in the United Kingdom, the gender pay gap in the United Kingdom is relatively high. In order to provide reliable evidence on the use of job evaluation / classification in organisations across the EU, quantitative research based on primary data collections is necessary.

## **4.2 Implementation of job evaluation / classification at national level**

Overall, two different approaches in which national governments enforce job evaluation / classification could be detected. A first approach includes the definition of criteria for job evaluation / classification such as the complexity of work, responsibility, physical and psychological strain, working conditions, efficiency, experience, skills, qualification and comparable work results. This approach is applied in countries such as the Czech Republic, Hungary and Slovenia (Burri & Van Eijken, 2013). A second approach refers to the definition of gender-neutral processes for job evaluation / classification. Thus, instead of specifying concrete criteria, this approach targets at specifying how job evaluation / classification needs to be conducted in order to deliver gender-neutral results. This approach is for example applied in Belgium (Institute for the Equality of Women and Men, 2010).

For the focus countries, we examined the level of collective bargaining, as collective bargaining often determines the preconditions for legislation, legislation itself – particularly with regard to the definition of equal pay and equal work – as well as additional activities by the government, which are reported to support the enforcement of job evaluation / classification.

### **4.2.1 Germany**

In Germany, wage bargaining is centralised on a medium level; thus, bargaining mainly takes place on a sector or industry level (Eurofound, 2014a). Furthermore, union concentration is exceptionally high in Germany (Eurofound, 2014a). Due to the way in which autonomy of collective bargaining (freedom of coalition) is defined in the German Constitution, the Federal Labour Court decided that the evaluation of work and the establishment of systems of pay are crucial parts of

this autonomy, in which the State must not interfere (Burri & Van Eijken, 2013). Thus, most wages and job evaluation / classification systems are set under the Act on Collective Bargaining (Tarifvertragsgesetz), which does not include provisions on equal pay (Burri & Van Eijken, 2013). Furthermore, the General Act on Equal Treatment includes a general prohibition of discrimination, but no definition of equal pay. Neither are concepts of pay and work of equal value defined in statutory legislation. Likewise, the AGG (Allgemeines Gleichbehandlungsgesetz) does not refer to equal pay but includes a general prohibition of discrimination (Burri & Van Eijken, 2013).

In collaboration with the major German employer associations, the German government provides tools for the implementation of gender-neutral pay, which include some of the principles of gender-neutral job evaluation / classification.

#### **4.2.1.1 Logib-D**

Logib-D is an analytical tool which supports organisations in detecting gender-disparity in their pay structures<sup>8</sup>. The tool analyses the gender pay gap while controlling for age, tenure, education, and working time. In addition, gender-disparity on ratings of demand level (ranging on a 6-point scale from simple and repetitive tasks to demanding and complex tasks) and job position (ranging on a 6-point scale from no leadership responsibility to top-level leadership responsibility) can be examined. Data is provided for individual employees. Thus, Logib-D is a very useful tool for examining if gender inequalities exist. However, it does not provide support in detecting the root causes of gender-disparities and is not connected with job evaluation / classification.

#### **4.2.1.2 Eg-check.de**

Eg-check provides three tools for detecting gender-inequality in pay: 1) structures for aggregating data, 2) questions for detecting discriminating rules, and 3) criteria for the direct comparison of jobs<sup>9</sup>. The last tool applies criteria for job evaluation / classification as pay is examined in relation to criteria such as knowledge and abilities, psychosocial competencies, responsibility and physical demands. However, jobs are evaluated on an individual level comparing a male employee with a female employee – a method which can bias ratings of criteria, criteria are only broadly defined, providing ambiguity that furthers the influence of stereotypes, and the tool is designed to examining discrimination claims; thus, it is reactive rather than designed for supporting the preventive examination of pay schemes.

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<sup>8</sup> <http://www.logib-d.de/startseite/>

<sup>9</sup> <http://www.eg-check.de/html/278.htm>

#### 4.2.1.3 Abakaba

In order to facilitate the application of gender-neutral job evaluation / classification, Abakaba (Analytische Bewertung von Arbeitstätigkeiten nach Katz und Baisch) provides a catalogue of specific criteria which are clustered within an intellectual area, a psychosocial area, a physical area and responsibility (Katz & Baisch, 1996). The criteria include work demands and impairments and are additionally rated with regard to their frequency (Katz & Baisch, 1996). Based on Abakaba, the diagnostic tool VIWIV (Verdiene ich, was ich verdiene?) is provided, which aims to support the evaluation of pay discrimination on an individual level (Katz & Baisch, 1996). Thus, VIWIV provides job evaluation / classification for a reactive examination, but does not support the preventive examination of pay schemes.

#### 4.2.2 United Kingdom

In the United Kingdom, wage-bargaining is highly decentralised as it takes place on a local or company level and shows a low level of coordination (Eurofound, 2014a). Legislation is driven by a comparator approach in equal pay cases, specifying that a comparator is a person of the opposite sex who is employed by the same employer in the same establishment, or one for whom broadly similar terms and conditions apply (Burri & Van Eijken, 2013). Thereby, legislation refers to like work (i.e., same or broadly similar work), work of equal value (i.e., different work of equal value in terms of factors such as effort, skill and decision-making), and work rated as equivalent (i.e., different work rated under the same job evaluation scheme) as being work of equal value (Burri & Van Eijken, 2013). Thus, legislation specifically refers to job evaluation and further details that job evaluation must be thorough, analytic, based on jobs (instead of the person who is currently doing the job), and non-discriminatory in criteria and weighting. In line with those specifications, United Kingdom shows a high level of activities for promoting gender-neutral job evaluation / classification to employers.

##### 4.2.2.1 Job evaluation for civil servants

For civil servants, the government published a practical guide including job evaluation and grading support<sup>10</sup> and a specific guide focusing on job evaluation of senior posts<sup>11</sup>. Both practical guides provide guidance on processes for gender-neutral job evaluation including checklists and templates for job evaluation. The concrete process steps suggested are 1) qualitative interviews with post-holders and managers, 2) scoring of anonymised job profiles by two evaluators, and 3) formal sign off of the resulting job evaluation by a senior manager. The general guide includes the following factors for the job evaluation: Problem solving,

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<sup>10</sup> <https://www.gov.uk/government/publications/job-evaluation-and-grading-support-jegs-for-civil-servants>

<sup>11</sup> <https://www.gov.uk/government/publications/job-evaluation-for-senior-posts-good-practice-guide>

decision making, autonomy, management of resources, and impact in addition to asking for required skills and experience and the guide for senior posts specifies managing people, accountability, judgment, influencing and professional competence as factors for job evaluation.

#### **4.2.2.2 Think, act, report<sup>12</sup>**

In addition, the United Kingdom has launched a voluntary initiative with the aim to promote transparency on gender equality. This initiative promotes the identification of issues around gender equality by collecting and considering relevant data (*think*), taking steps to address the identified issues (*act*), and creating transparency on the actions which are taken (*report*). Although this framework does not explicitly refer to job evaluation and job classification, it recommends narrative descriptions of the organisation's approach and actions to promote gender equality in addition to quantitative workforce and pay measures. With job evaluation and job classification being one of those recommended approaches, the initiative indirectly promotes reporting of job evaluation / classification and therefore increases transparency on its use.

#### **4.2.3 Sweden**

Sweden is characterised by highly coordinated bargaining on the sector or industry level. Thus, there is an informal centralisation of bargaining by monopolistic and powerful union confederations with or without government involvement (Eurofound, 2014a). Chapter 3 of the 2008 Discrimination Act defines the concept of equal pay in the following way: "Work is to be considered equal in value to other work if, based on an overall assessment of the nature of the work and the requirements imposed on the worker, it may be deemed to be of similar value. Assessments of work requirements shall take into account criteria such as knowledge and skills, responsibility and effort. When the nature of the work is assessed, particular regard shall be taken of the working conditions" (Burri & Van Eijken, 2013). In all likelihood facilitated by the high level of centralisation, gender-neutral job evaluations are reported to be often included in the framework of collective agreements based on the following four criteria: Knowledge and experience, degree of effort, responsibility and working conditions. In addition, factors such as physical and mental stress, competence, degree of independence, planning, and decision making can be taken into account<sup>13</sup>.

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<sup>12</sup> <https://www.gov.uk/government/policies/creating-a-fairer-and-more-equal-society/supporting-pages/think-act-report>

<sup>13</sup> [http://ec.europa.eu/justice/gender-equality/gender-pay-gap/national-action/job-evaluation/index\\_en.htm](http://ec.europa.eu/justice/gender-equality/gender-pay-gap/national-action/job-evaluation/index_en.htm)

#### 4.2.4 France

According to Eurofound (2014a), France is characterised by collective bargaining at the sector or industry level, with low levels of coordination. For equal pay for men and women, the Labour Code provides the definition "for the same job or a job of equal value" (Burri & Van Eijken, 2013), whereby pay is defined in line with Article 157 TFEU (Burri & Van Eijken, 2013) as "the ordinary basic or minimum wage or salary and any other consideration, whether in cash or in kind, which the worker receives directly or indirectly, in respect of his employment, from his employer"<sup>14</sup>. The 2006 Act on Equal Pay between Women and Men requires compulsory annual bargaining of wages and other advantages in cash or in kind for organisations with more than 50 employees, which are required to deal with equality. In order to ensure that negotiations cover gender equality, specific and quantitative information on gender equality must be provided covering recruitment, qualifications, work-life balance, training, and pay (Commission Staff Working Document SWD(2013)512). Furthermore, sanctions are imposed on organisations which do not conclude agreements on gender equality (Burri & Van Eijken, 2013). Finally, legislation specifies that evaluation criteria must not lead to discrimination and take into account all relevant skills. In case of discrimination identified, the evaluation criteria will be corrected. With regard to additional activities, the government provides a diagnostic framework for detecting gender differences.

##### 4.2.4.1 Diagnostic Égalité Professionnelle<sup>15</sup>

The diagnostic framework for detecting gender differences roughly examines the gender pay gap for different employee groups differentiated between workers, employees, supervisors, and technical specialists. Apart from this rough classification, it does not provide additional job evaluation criteria for the examination of the gender pay gap.

#### 4.2.5 Latvia

In Latvia, wage bargaining takes place on the local or company level and is characterised by a low level of coordination (Eurofound, 2014a). Although there are some sectors of industry with generally binding collective agreements such as construction, medicine or the railways, these do not specifically deal with issues concerning gender equality. Employees are generally obliged "to define equal pay for men and women for the same work or work of equal value" (Burri & Van Eijken, 2013). However, there are no legislative acts to define such concepts as "equal work" and "work of equal value". Deviating from EU law, pay is defined as "regularly paid remuneration for work, which also includes bonuses and other

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<sup>14</sup> <http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:12012E/TXT&from=EN>

<sup>15</sup>

[http://www.cite.gov.pt/asstscite/downloads/disp\\_salariais/Exemple\\_de\\_tableau\\_Diagnostic\\_Egalite\\_Professionnelle.pdf](http://www.cite.gov.pt/asstscite/downloads/disp_salariais/Exemple_de_tableau_Diagnostic_Egalite_Professionnelle.pdf)

kinds of remuneration in connection with employment as provided by normative acts” (Burri & Van Eijken, 2013). Furthermore, there is no case law dealing with issues such as justifications for differences in pay (Burri & Van Eijken, 2013). Additional activities by the government could not be detected.

#### **4.2.6 Malta**

Malta is characterised by wage bargaining on the local or company level and shows a low level of coordination (Eurofound, 2014a). Equal pay is defined in line with Article 157 TFEU and Recast Directive 2006/54/EC (Burri & Van Eijken, 2013). However, neither the Employment and Industrial Relations Act nor the Equality for Men and Women Act define the concept of “work of equal value” (Burri & Van Eijken, 2013). Legislation clearly transfers the obligation to ensure equal treatment in pay for equal work to employers (Burri & Van Eijken, 2013). Further activities by the government could not be detected.

#### **4.2.7 Summary**

With the differences in definitions of pay and equal pay across Member States and resulting consequences being discussed in detail elsewhere (Burri & Van Eijken, 2013), the following points focus on the enforcement of job evaluation / classification. First, the general enforcement of job evaluation / classification is so far relatively low; only the United Kingdom could be found to promote job evaluation / classification both internally for public organisations and externally for private organisations. Second, there are preventive instruments which are valuable for detecting the gender pay gap in organisations. Yet, these instruments do not apply principles of job evaluation / classification and do not allow for the analysis of the mechanisms which lead to the gender pay gap. Thus, they are valuable for detecting if there is a gender pay gap, but they are less valuable for identifying measures to reduce it. Third, there are instruments which apply job evaluation / classification themes, but do this in a reactive manner serving primarily as analytical tools for examining discrimination claims. Thus, these instruments are not helpful for examining pay schemes preventively and likewise not valuable for the analysis of the mechanisms which lead to the gender pay gap. However, analysing these would be necessary in order to take corrective measures before litigation.

### **4.3 Promotion of job evaluation / classification in the social dialogue**

As the Directive has outlined the crucial role of social dialogue (employer representations and trade unions) for the implementation of the Directive, we will now analyse the social dialogue about the equality of pay and gender-neutral job evaluation / classification in Europe as well as in the focus countries.

### 4.3.1 Social dialogue on a European level

#### 4.3.1.1 Employer representations

On a European level, the main employer representations, i.e., *BusinessEurope*, *UEPME*, and *CEEP*, prioritise addressing gender roles, promoting women in decision-making, supporting work-life balance and tackling the gender pay gap to promote gender equality. Within tackling the gender pay gap, employer representations commit themselves to ensure that pay systems, including job evaluation, are transparent and gender-neutral (*Framework of actions on gender equality*, 2009). Furthermore, *BusinessEurope*, *UEPME*, and *CEEP* have established a toolkit<sup>16</sup> for gender equality in practice including 100 exemplary initiatives for promoting gender equality. Searching this database for job evaluation and job classification provides two results:

- The European Federation of Public Service Unions refers to training courses on equal pay including gender-neutral job evaluation<sup>17</sup>
- *Merkur*, a Slovenian retailer, refers to a system of job classification which includes roles, competences and standards of responsibilities<sup>18</sup>

Thus, except from these two examples, best practice examples and concrete guidelines on job evaluation / classification are still largely missing on a European employer representation level.

#### 4.3.1.2 Trade Unions

Compared to employer representations, European level trade unions have focused more specifically on tackling the gender pay gap and in this vein also on gender-neutral job evaluation / classification. The *ETUC* (*Confederation Syndicat European Trade Union*) has e.g., published a comprehensive document called “*Bargaining for Equality*”<sup>19</sup> in five different languages. This document aims at reducing the gender pay gap via collective bargaining and also deals with the topic of gender-neutral job evaluation / classification (*Pillinger*, 2014). However, it does not give specific guidelines on these topics but rather cites initiatives by national trade unions to implement gender neutral job evaluation / classification. The *EPSU* (*European Federation of Public Service Unions*) argues for enhancing the transparency of pay<sup>20</sup> and does comprehensive surveys on the gender pay gap and initiatives to reduce it in public services<sup>21</sup>. Within these surveys, it also deals extensively with gender-neutral job evaluation.

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<sup>16</sup> <http://erc-online.eu/gendertoolkit/#/>

<sup>17</sup> [http://erc-online.eu/gendertoolkit-etuc/wp-content/uploads/sites/2/2014/05/European-Federation-of-Public-Service-Unions-EPSU\\_Europe.pdf](http://erc-online.eu/gendertoolkit-etuc/wp-content/uploads/sites/2/2014/05/European-Federation-of-Public-Service-Unions-EPSU_Europe.pdf)

<sup>18</sup> [http://erc-online.eu/gendertoolkit-etuc/wp-content/uploads/sites/2/2014/08/Merkur\\_Slovenia.pdf](http://erc-online.eu/gendertoolkit-etuc/wp-content/uploads/sites/2/2014/08/Merkur_Slovenia.pdf)

<sup>19</sup> <http://www.etuc.org/publications/bargaining-equality#.VNyohC5qIQu>

<sup>20</sup> <http://www.epsu.org/a/7421>

<sup>21</sup> <http://www.epsu.org/r/580>

Additionally, it offers workshops for gender-neutral job evaluation / classification.

#### **4.3.1.3 Summary**

Although European-level employer representations are a strong force in promoting social dialogue on gender equality in general, only trade unions have so far engaged in very specific activities focusing on gender-neutral job evaluation / classification systems on a European level. It therefore would be very valuable if European-level employer representations would become more involved as well.

#### **4.3.2 Social dialogue on a national level**

On a national level, a recent study on the work of social partners on gender equality in Europe concludes that whereas trade unions often have an equality body and a specific action plan for gender equality, employer representations usually do not (Eurofound, 2014b, p. 2). The study further shows that there are clear differences between countries regarding the priority given to achieving gender equality and the way in which social partners aim at increasing gender equality. In the Eastern European and Baltic states, the social partners are mainly involved through formulating laws, strategies and policies by tripartite dialogue with national governments. In the Nordic and Benelux countries and to some extent also in France, Germany and Italy, collective bargaining is used. Independently from different social dialogue systems, i.e., decentralised collective bargaining systems such as in Cyprus, Malta and the UK, or more centralised ones such as in Denmark, Finland, Norway and Sweden, well-developed gender equality activities are reported among social partners (Eurofound, 2014b, p. 2).

Within the following, the concrete results for the six focus countries are presented including the general pattern of activity and specific activities on gender-neutral job evaluation and job classification.

##### **4.3.2.1 Germany**

Overall, social partners have relatively well-developed activities on gender equality issues in Germany. All national trade unions and all or some employer representations possess external action plans and strategies, i.e., action plans that aim at promoting gender equality in the labour market and society (Eurofound, 2014b, p. 13). The necessity of a new pay and grading system without discrimination has been recognized due to protests by workers in municipal social and child care services and negotiations on this matter are planned by the respective social partners (Pillinger, 2014).

Unions: The large German trade unions all engage in activities for reducing the gender pay gap. In order to do so, the IG Metall for example promotes transparency of pay and gender-neutral job evaluation<sup>22</sup> (but without giving explicit guidelines for implementing these). To reduce discrimination against women, IG Metall has enforced that physical requirements must not be taken into account anymore during job evaluation / classification<sup>23</sup>. The dbb, representing Germany's civil servants, is relatively active with regard to gender-neutral job evaluation: In conferences dealing with equal pay, the dbb has repeatedly addressed the topic of gender-neutral job evaluation and possible tools for reaching it<sup>24</sup>. In addition, the dbb has proposed that female-typed competencies such as interpersonal skills, which are so far not used for civil servants' job evaluation, should be taken into account<sup>25</sup> and has published an elaborate brochure on equal pay specifically focusing on gender-neutral job evaluation<sup>26</sup>. In addition, both trade unions Ver.di and the DGB request equal pay for equal work.

Employer representations: Employer representations are partnering with the German government. In 2001, the German government, the Bundesverband der Arbeitgeber (BDA), the Bundesverband der Deutschen Industrie (BDI), the Deutsche Industrie- und Handelskammer (DIHK) and the Zentralverband des Deutschen Handwerks (ZDH) signed a contract for the promotion of equal opportunities for women and men in the private industry. The contract stipulates that employer representations recommend measures to organisations to promote equal opportunities, work-family balance, increase of women in leadership positions, and the education of young women for future-oriented apprenticeships and studies. By now, the employer representations have published their fifth report on equal opportunities and the progress of activities agreed in this contract, which includes progress in the fields of education, employment, work and family, women in leadership positions and fair pay. Within the field of fair pay, Logib-D is mentioned as well as measures on re-entry in employment and the equal pay day, yet job evaluation and job classification are not explicitly mentioned. The BDA, for example, explicitly negates the existence of gender-based differences in job evaluation and classification<sup>27</sup>.

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<sup>22</sup> <http://www.igmetall.de/entgeltgerechtigkeit-fuer-frauen-11302.htm>;  
<http://www.igmetall.de/equal-pay-day-2014-13372.htm>

<sup>23</sup> <http://www.igmetall.de/internet/internationaler-frauentag-interview-helga-schwitzter-3728.htm>

<sup>24</sup> <http://www.dbb.de/cache/teaserdetail/artikel/fachbroschuere-der-dbb-bundesfrauenvertretung-was-ist-frauen-arbeit-wert/archivliste/2013/Juni.html>

<sup>25</sup> [http://www.dbb.de/fileadmin/pdfs/2013/130121\\_leitantrag\\_gerechte\\_bezahlung.pdf](http://www.dbb.de/fileadmin/pdfs/2013/130121_leitantrag_gerechte_bezahlung.pdf)

<sup>26</sup> [http://www.frauen.dbb.de/publikationen/geschlechtergerechte\\_leistungsbezahlung.pdf](http://www.frauen.dbb.de/publikationen/geschlechtergerechte_leistungsbezahlung.pdf)

<sup>27</sup> [http://www.arbeitgeber.de/www/arbeitgeber.nsf/id/de\\_mythos-entgeltdiskriminierung](http://www.arbeitgeber.de/www/arbeitgeber.nsf/id/de_mythos-entgeltdiskriminierung)

#### 4.3.2.2 United Kingdom

Social partners are classified as having relatively well-developed activities on gender equality issues; all national trade unions and some employers' organisations have external action plans and strategies (Eurofound, 2014b, p. 13). In addition, a coalition between trade unions and employer representations (the National Joint Council for Local Government in England and Wales, NJC) has developed its own, very detailed guidelines on job evaluation and classification<sup>28</sup>. The social partners in UK's health sector have negotiated the so called 'Agenda for Change', involving a job evaluation of all grades in the health sector<sup>29</sup>. In this realm, they have developed the extensive 'NHS job evaluation handbook', giving very specific information on developing (gender-neutral) job evaluation systems<sup>30</sup>.

Unions: Unite has initiated the 'PAY UP!' Equal Pay campaign in order to reduce the gender pay gap. Moreover, it has developed the "Fair Pay and Equality Audit Checklist"<sup>31</sup> that also gives guidelines on gender-neutral job evaluation / classification. UNISON, the public service union, also strives for defending the 'Agenda for Change'<sup>32</sup> and negotiates with employers to create fair and equal pay grading structures for members<sup>33</sup>. Similar attempts have been made by GMB (EPSU, 2013).

Employer representations: The Confederation of British Industry (CBI) mainly promotes measures on greater transparency, stronger advocacy and widening the talent pool (CBI, 2015), whereas the British Chamber of Commerce promotes shared parental leave, measures on recruitment, age equality, and the promotion of the "think, act, report" initiative of the British Government in an event series. Job evaluation / classification schemes were not specifically mentioned.

#### 4.3.2.3 Sweden

Social partners have relatively well-developed activities on gender equality issues; all national trade unions and all or some employers' organisations have

<sup>28</sup>

<https://www.google.com/url?sa=t&rcct=j&q=&esrc=s&source=web&cd=2&cad=rja&uact=8&ved=0CCYQFjAB&url=https%3A%2F%2Fwww.atl.org.uk%2FImages%2FGreen%2520book.pdf&ei=2FolVY3rI6zX7QaHjYCwDg&usg=AFQjCNGj1n4awjxfI3xZvgWUDP0vf7yfQ&sig2=PA9T6xoYHNkBnp3qjSt1zA&bvm=bv.88198703,d.ZGU>

<sup>29</sup> <http://www.nhscareers.nhs.uk/working-in-the-nhs/pay-and-benefits/agenda-for-change-pay-rates/>

<sup>30</sup>

[http://www.nhsemployers.org/~media/Employers/Publications/NHS\\_Job\\_Evaluation\\_Handbook.pdf](http://www.nhsemployers.org/~media/Employers/Publications/NHS_Job_Evaluation_Handbook.pdf)

<sup>31</sup> <http://www.unitetheunion.org/unite-at-work/equalities/equalityrepstoolkit/>

<sup>32</sup> <http://www.unison.org.uk/at-work/health-care/key-issues/defending-agenda-for-change/the-facts/>

<sup>33</sup> <http://www.unison.org.uk/get-help/pay/grading-claims/overview/>

external action plans and strategies (Eurofound, 2014b, p. 13). According to a Swedish expert, Swedish social partners are generally engaged in the debate about equal pay for work of equal value, yet usually do not deal with gender-neutral job evaluation and classification in specific.

Unions: During the collective bargaining campaign in 2013, the LO worked explicitly to tackle the gender pay gap between sectors dominated by women and men (Eurofound, 2014b). Unionen SE and SACO also deal with the equality of pay<sup>34</sup>. Insular unions seem to have implemented job evaluation based on objective and analytical criteria (Pillinger, 2014).

Employer representations: Despite the positive evaluation by Eurofound (2014b), information on gender equality activities by Svenskt Näringsliv, Svensk Industriförening and Arbetsgivaralliansen was scarce, indicating a focus on internal activities and no information on job evaluation / classification could be found.

#### 4.3.2.4 France

Social partners have relatively well-developed activities on gender equality issues; all national trade unions and all or some employers' organisations have external action plans and strategies (Eurofound, 2014b, p. 13). Activities on job evaluation / classification of social partners are supported by legislation which explicitly refers to job evaluation / classification.

Unions: Trade unions have the goal of increasing the value of female work. In 2004, they developed a job evaluation grid in order to assess the equivalence of male and female work. They have pointed out that typically female competencies must not be undervalued. CFDT has for example suggested that gender-neutral criteria should be used to develop job evaluation / classification systems. Furthermore, CFDT plans to develop a method for detecting the existence of possibly discriminating criteria in job evaluation systems (Pillinger, 2014). CGT Mines Énergie has proposed that the grading of female-dominated occupations should be reviewed, however, this proposal has so far remained without success (EPSU, 2013).

Employer representations: The UNAPL, the Medef and CGPME promote a broad set of measures including work-family balance, tackling stereotypes in education, gender roles, quotas for supervisory boards, promoting women in decision making and tackling the gender pay gap. The Medef particularly highlight the

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<sup>34</sup> <http://www.unionen.se/>; <http://www.saco.se/vara-fragor/jamstalldhet/jamstallda-loner-kostar-36-miljarder/>

responsibility of management for equal pay and career opportunities; but job evaluation and job classification are not mentioned explicitly.

#### **4.3.2.5 Latvia**

According to Eurofound (2014b, p. 13) and a national Eurofound expert for Latvia contacted in the realm of this study, gender equality is not a stated priority of social partners and no specific policy commitments have been developed by social partner organisations. Furthermore, neither trade unions nor employers' organisations have external action plans and strategies (Eurofound, 2014b).

Unions: No information on gender equality-related issues could be found on the websites of Latvian unions (e.g., the Free Trade Union Confederation of Latvia).

Employer representations: No information could be found on gender equality measures on the websites by LTRK, the Association of Mechanical Engineering and Metalworking Industries of Latvia and the Latvian Federation of Food Companies. The Latvian Employers' Confederation analyses the general topic of gender equality in working conditions by conducting surveys (Eurofound, 2014b).

#### **4.3.2.6 Malta**

Overall, the activities of social partners on gender equality issues are classified as relatively well-developed, but neither trade unions nor employers' organisations have external action plans and strategies (Eurofound, 2014b).

Unions: The Confederation of Malta Trade Unions provides information on the Equal Pay Day, but does not explicitly target job evaluation<sup>35</sup>. For more information, it links to the homepage of the European Commission.

Employer representations: No information could be found on measures regarding gender equality on websites by the Malta Chamber of Commerce, Enterprise and Industry, the Malta Federation of Industry and the Malta Employers' Association.

#### **4.3.2.7 Summary**

The outlined results indicate that across countries, unions are more strongly promoting job evaluation / classification than employer representations. Furthermore, there are strong differences in the degree to which the social partners in the different Member States engage in measures to promote equal pay and gender-neutral job evaluation and classification. Whereas France and the UK

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<sup>35</sup> <http://www.cmtu.org.mt/#!equal-pay-day-2014/ceft>

are highly involved in this issue and provide some very specific guidelines for implementation, other Member States' actions are not this advanced. Whereas German unions and employer representations deal with the topic of equal pay, specific recommendations for the implementation of job evaluation / classification are largely lacking. Gender-neutral job evaluation and classification do not seem to play a role in the social dialogue in Malta and Latvia.

#### **4.3.3 Promotion of job evaluation / classification by equality bodies**

In order to ensure equality and fairness for all groups within a Member State, all EU Member States have established equality bodies. As outlined in the Commission Staff Working Document and the Bauer report, these bodies play a crucial role in promoting and monitoring gender-neutral job evaluation / classification systems. We will now outline which activities the equality bodies in the focus countries have engaged in after the entry into force of the Directive.

##### **4.3.3.1 Germany**

In its publication "Wichtige Entwicklungen beim Diskriminierungsschutz im Jahr 2013" the German equality body (Antidiskriminierungsstelle) informs briefly about the Directive 2006/54/EG. In the publication „Gleiche Arbeit, ungleicher Lohn?“ it states that job evaluation / classification should be performed equally for men and women and that biased evaluation systems should be updated. The equality body also offers internet links to tools such as eg-check.de and Logib-D and the homepage of the European Commission. In the publication "Ihre Arbeit ist es wert" it explains the gender pay gap and gives advice to individual women (e.g., "tell your employer about tools such as eg-check.de or Logib-D")<sup>36</sup>. As can be seen from these documents, pay equality is an important topic for the German equality body. However, it seems that the importance of job evaluation / classification for achieving this goal has not been sufficiently recognised. The equality body also states that so far, it has only dealt with very few lawsuits regarding the equality of pay.

##### **4.3.3.2 United Kingdom**

Based on the Equal Pay Law, the Equality and Human Rights Commission recommends a five-step equal pay audit model. With the analysis of equal work being a central step of this model, the Commission further provides guidelines on job evaluation within the Equal Pay Resources and Audit Toolkit (Equality Act 2010 Code of Practice). This guide details and defines gender-neutral job evaluations and provides elaborate checklists for the gender-neutral design and implementation of job evaluation schemes (Equality and Human Rights

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<sup>36</sup> [http://www.antidiskriminierungsstelle.de/DE/Home/home\\_node.html](http://www.antidiskriminierungsstelle.de/DE/Home/home_node.html)

Commission, 2010)<sup>37</sup>. The United Kingdom's equality body thus provides a wealth of valuable information on gender-neutral job evaluation / classification.

#### 4.3.3.3 Sweden

Sweden's equality body has developed a computer program for assessing the job evaluation processes in companies as well as the existence of pay equality<sup>38</sup>. In order to determine which jobs are equivalent in wage surveys, a review of job demands is made in a systematic and gender-neutral manner. The program can be used in the evaluation and grouping of similar activities in conjunction with a salary survey. The method is based on the main areas of knowledge and skills, responsibility, effort and working conditions, as recommended in the Commission Staff Working Document Commission Staff Working Document SWD(2013)512. The publication "Pay surveys - provisions and outcomes" deals with the topic of work of equal value. In addition, it addresses possible systematic undervaluation of female-typed compared to male-typed skills. Finally, workshops are offered to help employers with implementing gender-neutral job evaluation systems.

#### 4.3.3.4 France

The French equality body has published an extensive guideline on the topic of equal work of equal value that was developed together with the social partners<sup>39</sup>. This guideline describes job evaluation practices that seem gender-neutral but are not, uses best practice strategies from other countries and outlines how to make job evaluation / classification gender-neutral. In 2013, the Defender of Rights (le Défenseur des droits) has introduced the measures for gender-neutral job evaluation outlined in this publication to a national expert group striving for promoting the principle of equal pay. In addition, in order to encourage a review of classifications, the Defender of Rights has met many different stakeholders (such as trade unions, the National Association of HR managers, companies, etc.) and organized conferences and workshops<sup>40</sup>. Thus, the French equality body uses a comprehensive and well-designed approach specifically targeting gender-neutral job evaluation / classification.

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<sup>37</sup> <http://www.equalityhumanrights.com/private-and-public-sector-guidance/employing-people/managing-workers/equal-pay/equal-pay-audit-toolkit/carrying-out-equal-pay-audit/step-2-additional-information>

<sup>38</sup> <http://www.do.se/sv/Material/Analys-lonelots/>

<sup>39</sup> <http://www.aravis.aract.fr/defenseur-des-droits-un-guide-pour-une-evaluation-non-discriminante-des-emplois-a-predominance-feminine/>

<sup>40</sup> <http://www.defenseurdesdroits.fr/sinformer-sur-le-defenseur-des-droits/linstitution/actualites/le-defenseur-des-droits-soutient-la>

#### 4.3.3.5 Latvia

As outlined in the Report on the Year 2013 by the Latvian Ombudsman<sup>41</sup>, the focus of fair pay seems to lie less on wage differences between men and women, but more on the overall amount of wage (that is usually only little above the legal minimum). In accordance, no information on the gender pay gap and job evaluation / classification could be found on the homepage of the Latvian Ombudsman.

#### 4.3.3.6 Malta

The National Commission for the Promotion of Equality awards the Equality Mark<sup>42</sup> to companies that have good employment practices, including on equal pay, which go beyond what is determined by law (Directive 2006/54/EC). However, descriptions do not refer specifically to job evaluation / job classification schemes. Malta's equality body links to the Directive on its websites.

#### 4.3.3.7 Summary

As outlined above, the activities on equal pay and gender-neutral job evaluation / classification of equality bodies strongly differ between the Member States. Whereas the United Kingdom, France and Sweden already have very elaborate material and activities for promoting gender-neutral job evaluation / classification, the other Member States scrutinised have more diffuse activities for achieving equal pay.

## 5. Access to legal recourse and compensation and overview on legal remedies

In general, only few cases are considered with regard to pay discrimination. If so, processes are usually lengthy, which speaks to the inefficiency of processes. In addition, some countries such as the United Kingdom particularly stress the importance of a comparison, i.e., a target person must be compared to another person in a comparable situation (Commission Staff Document, 2013), which impedes case law based on job evaluation / classification. Nevertheless, two cases which explicitly refer to job evaluation / classification could be detected.

### 5.1 Discrimination by assigning different criteria evaluations within the same job evaluation / classification scheme (case from the United Kingdom)

In 1999 P became regional director on a salary of £40,000 p.a. Three colleagues, R, W and H, were all paid more than her, with R earning the highest salary at

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<sup>41</sup>

[http://www.tiesibsargs.lv/files/content/zinojumi/Tiesibsarga%20gada%20zinojums\\_2013\\_ENG.pdf](http://www.tiesibsargs.lv/files/content/zinojumi/Tiesibsarga%20gada%20zinojums_2013_ENG.pdf)

<sup>42</sup> [https://socialdialogue.gov.mt/en/NCPE/Pages/The\\_Equality\\_Mark/The\\_Equality\\_Mark.aspx](https://socialdialogue.gov.mt/en/NCPE/Pages/The_Equality_Mark/The_Equality_Mark.aspx)

£55,000 p.a. All four were graded as Level 6 Range 3 on the pay scale. The organisation had a pay scheme based on job evaluation / classification but rated P differently in several criteria. The tribunal examining the case rejected the reasons for the different ratings and noted “that the employer had introduced a salary scheme, based on experience, skills, knowledge and ability, but after a few years it fell into disuse and salaries were again determined on an ad hoc basis. Individuals would know their classification and their own salary but not where they fell within a salary band. According to the tribunal, the employer only operated an objective pay structure for a few years”, then let go of it (Barrow, 2012).

## **5.2 Discrimination by applying different job evaluation / classification schemes (case from Germany)**

In a logistics company in Hamburg, women were employed under a different collective agreement than men despite equal work, which led to wage differences of up to 300€ (women were employed under the Angestelltentarifvertrag and men were employed under the Lohntarifvertrag). In this lawsuit, the workers’ council achieved (on the basis of § 17(2) of the Allgemeines Gleichbehandlungsgesetz AGG) that the employer agreed to an arrangement after receiving order and subsequently to a bargaining agreement on the abolition of this discriminating practice (ArbG Hamburg, enactment from 24.08.2007- 17 BV 2/07)<sup>43</sup>.

## **6. Difficulties encountered by Member States in the implementation of the Directive 2006/54/EC**

### **6.1 Difficulties encountered by organisations**

Developing an individualised job evaluation / classification system is a *resource-intensive process* that requires a lot of time and expertise (see also International Labor Office, 2008). Therefore, particularly small- and medium-sized companies may face difficulties in engaging in this process (which is reflected for example in the low usage rates of job evaluation / classification systems in these companies, as described in 4.1.). An additional difficulty encountered by organisations is the fact that the principle of job evaluation only partly matches the logic of their own pay allocation systems: As outlined in 3.2.2, organisations often allocate pay at least partially according to individual employees’ performance (i.e., actual outcomes) instead of the requirements of certain positions (i.e., necessary input). Thus, the Directive might seem to organisations as not fitting with their business logic which might further decrease their willingness to engage in this resource-intensive process.

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<sup>43</sup> [http://www.antidiskriminierungsstelle.de/DE/Home/home\\_node.html](http://www.antidiskriminierungsstelle.de/DE/Home/home_node.html)

## **6.2 Difficulties encountered by national governments**

First, gender equality is not the most important point on the agenda of some countries, especially of those which were severely hit by the economic crisis (Eurofound, 2014b). Thus, for these countries it might be difficult to take the necessary means such as the introduction of definitions for pay and equal pay in compliance with the EU legislation. Second, organisations are reluctant to adopt measures which dictate the course of action without leaving room for organisation-specific adaptations. The fact that analytical tools for examining the gender pay gap are either preventive but not based on job evaluation / classification schemes or based on job evaluation / classification but reactive (as outlined in point 4.2.7) might reflect organisations being only willing to apply the principles when forced to do so (by potential litigation).

## **6.3 Difficulties encountered by social partners**

As outlined in the Eurofound Study on social dialogue (2014b), several difficulties regarding gender-neutral job evaluation / classification have emerged for the social partners. Especially trade unions have criticised a lack of instruments for actually implementing gender-neutral job evaluation / classification and have asked for explicit guidelines on this topic (Pillinger, 2014). Moreover, in order to be able to include wage rates for every job into collective agreements, trade unions have demanded access to information on pay and job descriptions, as this information is currently lacking.

## **6.4 Difficulties encountered by equality bodies**

As outlined in 4.3.3.7, the degree to which equality bodies engage in activities to apply the Directive varies to a great extent. Whereas some equality bodies (in the United Kingdom, France, and Sweden) very specifically target gender-neutral job evaluation / classification, others do not promote this measure at all. Thus, for those countries currently using no or unspecific measures for tackling the gender pay gap, a lack of information seems to represent the main difficulty in the implementation of the Directive. In addition, national experts highlighted the crucial role of the national governments in promoting the use of gender-neutral job evaluation systems.

## **7. Summary of recommendations**

In the following we will outline our scientific recommendations for the enforcement of gender-neutral job evaluation / classification in the Directive as well as for its promotion and monitoring.

## **7.1 Enforcement of job evaluation and classification in the Directive 2006/54/EC**

We will start with those recommendations which target at enhancing gender-neutrality in each step of the job evaluation / classification process.

### **7.1.1 Measures necessary to ensure gender-neutrality of job evaluation and classification systems**

#### **7.1.1.1 Establishment of the evaluation committee**

In order to reduce potential stereotypic influences resulting from subjective ratings of the evaluation committee, the evaluation committee should be set up as a *mixed-sex evaluation committee* and provided with training *beforehand*. Furthermore, the role of *devil's advocate* (see 3.1.2.1) should be explicitly assigned and the evaluation committee should be made *accountable* for the whole job evaluation process.

#### **7.1.1.2 Generation of job descriptions**

In order to generate gender-neutral job descriptions, the evaluation committee should use *job-titles*, which should be defined in a *gender- and status-neutral* way, and engage in *structured free recall procedures for generating gender-neutral sub-factors*, which should be *clearly defined* and described by both *male- and female-typed examples*. *Standardized interviews or questionnaires* should be used for job evaluation, which should be translated into point scores by several members of the evaluation committee.

#### **7.1.1.3 Internal and external weighting**

In order to control gender-neutrality in internal and external weighting, a *weighting grid* should be developed by ranking both factors and sub-factors according to their importance for the organisation and be subsequently *checked for gender-neutrality* by analysing the mean percentages allocated to both male- and female-typed sub-factors.

#### **7.1.1.4 Assignments of points to jobs and job classification**

In order to avoid gender influences on job classification, *point levels should be assigned to job classes before starting the job evaluation / classification process*. After the job classification process it should be *checked* whether female-typed positions tend to end up at *upper interval boundaries* as this might indicate undervaluation due to gender biases.

### **7.1.2 Measures to translate gender-neutral job evaluation and classification into equal access to employment and working conditions focusing on pay**

We will now summarise our recommendations for translating gender-neutral job evaluation / classification into equal access to employment and equal working conditions<sup>44</sup>.

#### **7.1.2.1 Equal access to employment**

To ensure gender-neutrality in access to employment, job descriptions from the job evaluation process should be used in personnel selection processes. Therefore, the global job description developed in the job evaluation process ought to be translated into an *objective, behaviourally-based job description* for personnel selection. Based on this job description, *job advertisements* should be formulated using *gender-neutral job titles* and *gender-neutral wording*. Finally, applicants' competence should be measured by making use of *work samples, behaviourally-anchored rating scales* and *highly standardised selection interviews* based on job descriptions derived from the job evaluation process.

#### **7.1.2.2 Equal working conditions focusing on pay**

As job evaluation / classification does not provide information on how to deal with pay negotiations and performance-based pay, we recommend the following measures in addition to those measures recommended for increasing gender-neutrality in job evaluation / classification (see 7.1.1). For reducing gender-differences in starting pay, *transparency* about average salaries and wage limits should be enhanced for both female applicants and personnel decision makers and the *salience of gender* should be reduced in personnel selection processes, e.g., by making sure that women are not a minority in applicant pools. For performance-based pay, the principles of gender-neutrality outlined for job evaluation / classification should be applied to *reduce ambiguity in performance assessment* and *linking pay to performance*.

As these recommendations show, it might prove valuable to *enhance the notion of "equal pay for work of equal value"* and the recommendations on how to achieve it from the current input-based manner to an outcome-based notion such as *"equal pay for equal performance"*.

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<sup>44</sup> As outlined in 3.2.3, the diverse nature of occupational social security systems and the only indirect link of job evaluation and classification to social security systems make it difficult to give recommendations. Therefore, occupational social security systems are not included in the summary of recommendations.

## **7.2 Promotion of job evaluation and classification by national governments, social partners and equality bodies**

As outlined in the Directive, in the Commission report on its implementation (COM(2013) 861) together with its accompanying Commission Staff Working Document and in the European Parliament resolution of 10 March 2015, national governments, social partners and equality bodies play a crucial role in promoting gender-neutral job evaluation and classification.

In addition to those measures targeting the identification (without applying job evaluation / classification) and reactive examination of pay discrimination (by applying job evaluation / classification), national governments, social partners, and equality bodies should particularly promote instruments for the *preventive examination* of organisational pay schemes' *gender neutrality*. In addition to *checklists*, these could include analytical tools such as *weighting grids* and *checks for gender-equality in resulting job classes*. Furthermore, in order to facilitate the application of job evaluation / classification systems, *clear and unambiguous guidelines* on the necessary steps to implement job evaluation / classification systems should be provided.

A further step in facilitating the implementation of job evaluation /classification could be to *establish databases* which include factors and factor ratings for specific jobs and occupations. These should be enforced by national governments on national level or – as research shows that job-specific information on work activities and necessary skills is comparable across countries (Taylor, Li, Shi & Borman, 2008) – even European level<sup>45</sup> by the European Commission.

## **7.3 Transparency and monitoring of the implementation of the Directive 2006/54/EC**

We would advise to broaden the recommendations on strengthening the principle of equal pay between men and women through transparency<sup>46</sup> from *wage transparency* to *transparency of human resource processes*. Protecting personal and organisation-specific data, a first step could be to encourage organisations to descriptively report those measures which aim to foster gender-neutrality in their human resource processes. For example, governments and social partners could enforce the inclusion of this topic in annual reports.

In addition, some measures could be taken in order to enhance the monitoring of the implementation of the Directive 2006/54/EC. First, a *survey on the application*

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<sup>45</sup> The European Commission's efforts to establish European Skills, Competences, Qualifications and Occupations (ESCO) within the scope of the Directive 2005/36/EC could provide a valuable start for establishing such a database.

<sup>46</sup> Commission recommendation from 7.3.2014

*of job evaluation / classification schemes* in organisations across European countries would help in assessing the initial situation and thereby improve recommendations on further necessary actions. The European employer representations and unions could be entrusted with distributing this survey to organisations within countries. Its results should be summarised in a report, highlighting positive, but also negative / insufficient practices in the member states, giving starting points for further improvements. Second, a *systematic and longitudinal examination* would provide intermediate results and could help to identify when additional corrective actions are necessary. The European Parliament resolution of 10 March 2015 on progress on equality between women and men in the European Union asks for a recast and enforcement of Directive 2006/54/EC. In order to systematically assess the success of this recast and enforcement, the above mentioned survey on the application of job evaluation / classification schemes should be carried out *before* the recast of the Directive is published / measures for its enforcement are initiated. The success of this recast / reinforcement could then be evaluated by repeating the survey in discrete time intervals of about 2 years, which would allow assessing whether improvements with regard to job evaluation / classification have been made over time. Finally, *analyses of internal and external weighting of factors and sub-factors on a country-level or European level* would allow for the examination of differences in factor weighting across sectors and thereby increase the *transparency of the pay gap* between (male- and female-typed) sectors. To do so, information on job evaluation and classification should be gathered on the occupational level comparably to the European Skills, Competencies, Qualifications and Occupations database. This database would allow the analysis of weighting factors and calculation of reference values for gender-neutral pay levels. Based on the results of these analyses, a deeper insight particularly on the pay gap across professions and occupations and more fine-grained recommendations for enhancing the gender-neutrality of job evaluation and classification systems could be provided.

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## 9. Annex: Overview on the implementation of Directive 2006/54/EC

### 9.1 Annex I: Overview on the methodological approach of this research paper

<b>Step 1: Quantitative analysis</b>	
<p>Based on data from Eurostat, we analysed available statistical indicators for women’s access to employment, working conditions including pay, and occupational social security systems in the six focus countries and the EU as a whole. We analysed their development over time in order to compare the status quo before the entry into force of the Directive with the current status quo several years after the entry into force of the Directive.</p>	
<b>Step 2: Qualitative analysis</b>	
<b>Evaluation of job evaluation and classification with regard to gender stereotypes</b>	<b>Analysis of homepages and publications of national governments, social partners and equality bodies</b>
<p>Based on scientific theories and empirical evidence with regard to gender stereotypes we analysed the recommendations given in the Directive and in the Commission Staff Working Document SWD(2013)512. Moreover, we developed scientific recommendations for translating gender-neutral job evaluation and classification into equal access to employment, working conditions focusing on pay, and occupational social security systems.</p>	<p>Based on homepages and available publications, we analysed to which degree measures to promote equal pay in general and gender-neutral job evaluation and classification were applied in the six focus countries.</p> <p>For each focus country, we analysed homepages and publications of ministries, three major employer representations and three major trade unions as well as the equality bodies.</p> <p>In addition, we studied scientific publications and reports by official authorities.</p> <p>To validate our results, we contacted several experts on gender equality in the six member states and included the information provided by them<sup>47</sup>.</p>

<sup>47</sup> In sum, Eurofound experts from 4 member states provided additional information on the topic of gender-neutral job evaluation and classification in the social dialogue. Likewise, a renowned expert from the United Kingdom sent further information on the activities of social partners in several member states. Finally, the answers of two equality bodies could be incorporated.

## 9.2 Annex II: Summary of measures taken by the national governments, social partners and equality bodies in the six focus countries

	National government	Social partners	Equality Body
<b>Germany</b>	<ul style="list-style-type: none"> <li>• Collective bargaining in centralised on a medium level.</li> <li>• The state does not interfere with social partners’ decisions about job evaluation and the equality of pay.</li> <li>• Together with the major employer representations the government provides tools for the implementation of gender-neutral pay such as Logib-D.</li> </ul>	<ul style="list-style-type: none"> <li>• Well-developed activities on gender equality issues.</li> <li>• <u>Unions</u>: Specific initiatives to reduce the gender pay gap and to develop gender-neutral job evaluation systems.</li> <li>• <u>Employer representations</u>: Partner with the government to promote equal opportunities for men and women.</li> </ul>	<ul style="list-style-type: none"> <li>• Pay equality as an important topic.</li> <li>• Publications about the gender pay gap and tools for assessing it.</li> <li>• Little information on gender-neutral job evaluation and classification.</li> </ul>
<b>United Kingdom</b>	<ul style="list-style-type: none"> <li>• Collective bargaining is highly decentralised and shows low levels of coordination.</li> <li>• Legislation refers specifically to job-evaluation.</li> <li>• The government provides a wealth of information on gender-neutral job evaluation and classification such as a practice guide and checklists.</li> </ul>	<ul style="list-style-type: none"> <li>• Well-developed activities on gender equality issues.</li> <li>• <u>Unions</u>: Provide specific guidelines on gender-neutral job evaluation and classification.</li> <li>• <u>Employer representations</u>: Advocate for transparency and a greater use of the available talent pool as well as other diversity-related measures.</li> </ul>	<ul style="list-style-type: none"> <li>• Pay equality as an important topic.</li> <li>• Very detailed recommendations on a five-step equal pay audit model.</li> <li>• Detailed information and checklists for gender-neutral job evaluation and classification.</li> </ul>

	National government	Social partners	Equality Body
Sweden	<ul style="list-style-type: none"> <li>• Collective bargaining is informally centralised and highly coordinated.</li> <li>• Gender-neutral job evaluation and classification have often been part of collective bargaining.</li> </ul>	<ul style="list-style-type: none"> <li>• Relatively well-developed activities on gender equality issues.</li> <li>• <u>Unions</u>: Focus on tackling the gender pay gap.</li> <li>• <u>Employer representations</u>: Only scarce information available.</li> </ul>	<ul style="list-style-type: none"> <li>• Pay equality as an important topic</li> <li>• Own tool for assessing potential gender pay gaps.</li> <li>• Detailed information and workshops on gender-neutral job evaluation and classification.</li> </ul>
France	<ul style="list-style-type: none"> <li>• Collective bargaining is centralised on a medium level with low levels of coordination</li> <li>• Collective negotiations must include gender equality and thereby also pay equity</li> </ul>	<ul style="list-style-type: none"> <li>• Relatively well-developed activities on gender equality issues. Social partners have influence on gender-neutral job evaluation and classification due to legislation.</li> <li>• <u>Unions</u>: Suggest making use of gender-neutral job evaluation and classification.</li> <li>• <u>Employer representations</u>: Broad set of measures to promote gender equality.</li> </ul>	<ul style="list-style-type: none"> <li>• Pay equality as an important topic.</li> <li>• Very extensive guidelines for gender-neutral job evaluation and classification.</li> <li>• Equality body strongly promotes gender-neutral job evaluation and classification by talking to different stakeholders.</li> </ul>

	<b>National government</b>	<b>Social partners</b>	<b>Equality Body</b>
<b>Latvia</b>	<ul style="list-style-type: none"> <li>• Collective bargaining is centralised on a low level and is also little coordinated.</li> <li>• There are no legislative acts defining equal work and work of equal value.</li> </ul>	<ul style="list-style-type: none"> <li>• No specific activities on gender equality issues.</li> <li>• <u>Unions</u>: No information available.</li> <li>• <u>Employer representations</u>: No information available.</li> </ul>	<ul style="list-style-type: none"> <li>• Pay equality not a central topic.</li> <li>• No specific information on gender-neutral job evaluation and classification.</li> </ul>
<b>Malta</b>	<ul style="list-style-type: none"> <li>• Collective bargaining is of low centralisation and coordination.</li> <li>• There are no legislative acts defining equal work and work of equal value.</li> </ul>	<ul style="list-style-type: none"> <li>• Relatively well-developed activities on gender equality issues, but no external strategies.</li> <li>• <u>Unions</u>: No information available.</li> <li>• <u>Employer representations</u>: No information available.</li> </ul>	<ul style="list-style-type: none"> <li>• Award for companies that have good employment practices including equal pay.</li> <li>• No specific information on gender-neutral job evaluation and classification.</li> </ul>

This is a publication of the Ex-Post Impact Assessment Unit

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PE 547.554

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