

Business case of diversity and inclusion at work - impact of European Commission diversity and inclusion policies

Final Report

Written by Risk & Policy Analysts
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List of Abbreviations

Acronym	Definition
AI	Artificial Intelligence
AWEI	Australian Workplace Equality Index
BA/BSc	Bachelor of Arts / Bachelor of Science
BCG	Boston Consulting Group
CIT	Charter Implementation Toolkit
CSDDD	Corporate Sustainability Due Diligence Directive
CSR	Corporate Social Responsibility
CSRD	Corporate Sustainability Reporting Directive
DAX	Deutscher Aktienindex (German Stock Market Index)
DEI	Diversity, Equity, and Inclusion
D&I	Diversity and Inclusion
DG DEFIS	Directorate-General for Defence, Industry, and Space
DG EMPL	Directorate-General for Employment
DG FISMA	Directorate-General for Financial Stability, Financial Services, and Capital Markets Union
DG GROW	Directorate-General for Growth (Single market, Industry, Entrepreneurship, and Small Businesses)
DG JUST	Directorate-General for Justice and Consumers
DG RTD	Directorate-General for Research and Innovation
DINC	Diversity IN Check (survey diagnostic tool)

EISMEA	European Innovation Council and Small and Medium-sized Enterprises Executive Agency
ERGs	Employee Resource Groups
ESG	Environmental, Social, and Governance-based investing framework
ESRS	European Sustainability Reporting Standards
EU	European Union
EUTC	European Trade Union Confederation
EWOB	European Women on Boards toolkit
FOB	Forum Odpowiedzialnego Biznesu (Responsible Business Forum)
FTSE	Financial Times Stock Exchange
GDP	Gross Domestic Product
GDPR	General Data Protection Regulation
HR	Human Resources
ICF	International Coaching Federation
ILO	International Labour Standards
ISO	International Organisation for Standardisation
LGBTIQ	Lesbian, Gay, Bisexual, Transgender, Intersex, and Queer / Questioning community
KPIs	Key Performance Indicators
NEET	Young people not in education, employment or training
MEL	Monitoring, Evaluation, and Learning
NEET	Not Employed, Educated, or Trained
NGO	Non-governmental organisation

OECD	Organisation for Economic Co-operation and Development
PwC	PricewaterhouseCoopers (consultancy)
SBF	Société des Bourses Françaises (French Stock Market Index)
SDGs	Sustainable Development Goals
SER	Sociaal-Economische Raad
SMEs	Small and Medium-sized Enterprises
SMETA	Sedex Members Ethical Trade Audit
UN	United Nations
UNI	Union Network International
VET	Vocational Education and Training

1. Abstract

This report explores the business case for diversity and inclusion (D&I) in the workplace and assesses the impact of Diversity Charters and the EU Platform of Diversity Charters. The study highlights the benefits of D&I across various dimensions, including recruitment, retention, performance, innovation, problem-solving, reputation, and consumer satisfaction, emphasising the importance of robust implementation supported by top management and inclusive policies. Despite slow progress and gaps in certain diversity areas, such as racial or ethnic origin, disability, and LGBTIQ+ inclusion, the findings highlight significant potential for societal and organisational gains through broader D&I adoption. Diversity Charters, established in all 27 EU Member States, play a vital role in promoting D&I by offering tools, training, and networking opportunities, though challenges like limited resources and ingrained cultural biases remain. The EU Platform of Diversity Charters provides valuable support to Charter organisations, enabling cross-learning and offering resources like toolkits and self-assessment tools, with suggestions for expanding its scope and consistency. The study concludes by providing recommendations for organisations, Diversity Charters, and the European Commission which emphasise the importance of D&I for achieving equitable, innovative, and socially responsible workplaces across Europe.

2. Executive summary

English version

Introduction

This report, conducted as part of the “Study on the “Business case of diversity and inclusion (D&I) at work - impact of European Commission diversity and inclusion policies”, offers insights into the businesses case for workplace D&I, on the impact of Diversity Charters and the EU Platform of Diversity Charters, and provides recommendations for organisations/businesses, the Diversity Charters and the European Commission.

Study objectives and methodological approach

The **study aims** were to explore the benefits and business case for D&I policies and practices in private and public organisations, and to assess the impact of signing a Diversity Charter on advancing these policies and practices. The study addressed **four research questions** focusing on the economic and social costs and benefits of D&I, the impact of the EU Platform of Diversity Charters, the outcomes of signing a Diversity Charter, and exemplary practices promoting D&I. Covering both signatories and non-signatories across the EU, the study examined international evidence and focused on organisations based in the 27 EU Member States, as of year 2010, following the establishment of the EU Platform of Diversity Charters.

The study applied a robust methodological approach aligned with the European Commission’s Better Regulation guidelines. To gather different perspectives and insights, the research process involved literature and data reviews, and a stakeholder engagement including an online survey, targeted interviews and workshops. Findings and recommendations were discussed and refined during a final seminar with key stakeholders.

Key findings on the business case

The **term business case** is defined as a broad concept that encompasses a range of business/economic, societal, well-being, and fairness-related impacts, which have been assessed in the literature using a range of quantitative and qualitative methods. The D&I benefits depend on the effective implementation and the presence of supporting framework conditions, such as investment in D&I measures and top management support.

The study identifies **four interconnected business cases**:

- the performance case, showcasing benefits like improved decision-making and innovation;
- the talent case, focusing on attracting and retaining top talent;
- the representation case, which enhances legitimacy and customer understanding;
- the corporate social responsibility (CSR) case, promoting social justice and improving organisational reputation.

Together, these cases provide a compelling rationale for prioritising D&I across organisations and policymakers.

Recruitment and staff retention benefits

Diversity policies in recruitment enhance organisational attractiveness, broaden applicant pools, and boost job pursuit intentions, particularly through diversity statements in job advertisements that resonate positively with underrepresented groups while also appeal to the broader workforce. Both private and public sector organisations benefit from diversity practices. Inclusive policies enable them to attract top talent, improve employer reputation, and address specialised skill shortages in competitive fields.

Diversity policies in employee retention bring benefits such as reduced turnover intentions, increased organisational commitment, and higher job satisfaction. A positive diversity environment, characterised by equal opportunities, anti-discrimination measures, and inclusion initiatives, promotes a sense of belonging and justice. This is particularly impactful for retaining underrepresented groups, including women, LGBTIQ, ethnocultural minorities and religiously diverse employees. However, the perception of diversity policies can vary, with some studies noting dissatisfaction among majority groups, highlighting the importance of carefully designed inclusion strategies to balance the needs of all employees. Some studies also point to the risk of underrepresented groups' negative perception diversity and inclusion statements in job adverts.

Performance benefits

D&I policies significantly enhance organisational performance by improving financial outcomes, innovation, customer satisfaction, and team efficiency across private and public sectors. Studies show that diverse teams better understand and engage with varied markets and customers, leading to higher profitability and innovation revenues. In the public sector, D&I efforts support innovation and development goals while promoting a workforce reflective of diverse populations, thereby enhancing service delivery and fulfilling CSR objectives.

Innovation and creativity benefits

Cognitive diversity, encompassing varied perspectives, skills, and experiences, is crucial for fostering innovation by reducing unconscious bias and preventing groupthink, thereby enhancing critical thinking and decision-making. Research highlights that teams benefit most from diversity when they actively integrate diverse ideas, value others' perspectives, and adapt decision-making processes. Furthermore, evidence suggest that public sector organisations can also gain advantages by recruiting diverse individuals.

Problem solving and decision-making benefits

An inclusive environment where diverse perspectives are valued enhances decision-making by reducing biases, encouraging comprehensive analysis, and fostering innovative solutions, benefiting both individuals and organisations. Diverse teams in both private and public sectors also better understand and address the needs of varied customer bases or populations, leading to decisions that align with market demands or effective public policies.

Company reputation benefits

D&I policies enhance corporate reputation by meeting stakeholder expectations for equity, fairness, and social responsibility. This, in turn, helps attract talent, strengthen customer relationships, and improve competitiveness. Companies with diverse workforces are viewed as progressive and socially responsible, appealing to multicultural markets, socially aware consumers, and ESG-focused investors, while exclusionary practices risk harming reputation through lawsuits and public scrutiny. Despite notable evidence on the reputational benefits of sex and racial or ethnic diversity, gaps remain in research on neurodiversity, disability, socioeconomic inclusion, and religious diversity.

Consumer satisfaction benefits

A diverse workforce strengthens an organisation's ability to understand and meet the needs of a diverse customer base, leading to higher customer satisfaction, improved service quality, and better customer relations. Studies show that diversity supports customer engagement and loyalty by fostering deeper insights into customer preferences, which allows for more tailored products and services. In the public sector, a workforce reflective of population diversity improves service delivery, addresses cultural nuances effectively, and fosters trust and equity in public services, further strengthening relationships between government and citizens. Diversity also contributes to a positive reputation, boosting customer trust and loyalty through alignment with CSR values.

Organisational culture benefits

Organisational culture, shaped by both written and unwritten values, influences employee behaviour and contributes to a firm's success. D&I policies not only help recruitment and retention but also foster an inclusive culture, driving structural changes, improving information sharing, increasing job satisfaction, and enhancing overall performance, particularly for diverse employees.

Fairness and equity benefits

D&I policies are crucial for promoting and strengthening fairness, equity, and social cohesion, particularly in the public sector, which has a unique responsibility to promote social justice and address historical inequalities. By prioritising D&I, organisations can create more inclusive workplaces, enhance societal fairness, and contribute to macroeconomic gains through improved resource allocation, market resilience, and reduced systemic inequalities.

Potential further benefits from wider implementation of D&I policies and practices in Europe

The analysis highlights slow but steady progress in implementing D&I policies across European organisations, with many companies prioritising D&I and some recognising its economic value. However, challenges persist, including limited maturity of D&I programmes and inadequate focus on all diversity dimensions with some diversity & inclusion programmes targeting only selected dimensions. Additionally, smaller companies often lack data and transparency on D&I practices, while methodological inconsistencies in available evidence limit the ability to draw comprehensive comparisons or measure the full impact of these initiatives.

Remaining gaps in D&I policies and practices highlight the potential for greater benefits with broader and more comprehensive implementation. Addressing gender and age disparities in the workforce can expand talent pools and improve business performance, while embracing ethnocultural diversity, which can boost economic efficiency given their significant representation in younger cohorts. Similarly, fostering inclusion for LGBTIQ individuals offers substantial benefits for employers and society, though workplace discrimination continues to pose challenges. These findings highlight the need for robust D&I policies that encompass all diversity dimensions to drive organisational and societal gains.

The macroeconomic costs of job market and workplace discrimination are significant and illustrative estimates are provided for discrimination on the grounds of racial or ethnic origin, sex and age. The potential contribution of D&I policies to macroeconomic growth is thus substantial, even in a scenario where D&I policies address a small part of the macroeconomic costs of discrimination.

Key findings on the impact of Diversity Charters

Diversity Charters membership

The European Commission began funding an EU-level Platform of Diversity Charters in 2010 and now covers all 27 Member States, with almost 17,500 organisations¹ having signed up to national Diversity Charters by the beginning of 2024. Half of the 10 organisations running charters that were interviewed during the study indicated that they had a significant number of SMEs as signatories, but a number also indicated difficulty in reaching rural organisations.

Diversity Charters establishment and set-up

Governance and funding structures of the national organisations running the Diversity Charters vary from Member State to Member State, with some operating on limited financial resources or pro-bono basis and others charging membership fees or receiving external funding from state resources

Motivations to join Diversity Charters

The most often cited reasons for becoming a signatory to a charter were promoting diversity and to benefit society, as well as to access support to implementing D&I policies through the tools, advice and networking support provided by charters and to promote employee engagement and innovation within organisations. Company branding and improving an organisation's image was also considered an important benefit. On the other side, some reasons for not becoming a signatory included that the organisation saw no immediate need or was planning to join in the future.

Areas covered and service provided

Charters differ in the thematic areas of D&I that they cover, with gender/sex, disability/ability, sexual orientation, LGBTIQ and racial or ethnic origin and religion or belief being widely covered. In terms of services offered, support for the creation of D&I policies (through the development of actions plans and programmes), training, awareness campaigns, research and publications, and workshops, conferences and networking are widely provided. Exchanging information on best practices in D&I is considered by many signatories as being a valuable resource.

Actions taken by signatories

As a result of being a signatory to a Charter, many organisations responding to the survey conducted under the study indicated that they have taken positive actions to improve D&I within their organisation. This includes self-diagnosis to assess D&I status, participating in D&I events and campaigns, staff attendance at training courses and seminars. Further examples include developing and introducing specific D&I policies and actions (including monitoring of progress) across the organisation.

Facilitating factors and challenges

Involvement of leadership within organisations was identified as being a critical factor enabling progress to be made and cross-fertilisation of approaches and strategies between organisations was also highlighted.

Whilst progress in D&I has been made across signatories, some key barriers and challenges remain, including overcoming ingrained cultural biases, resistance to change/lack of motivation within organisations, and measuring progress/impacts of

¹ Data on signatories received from the European Commission as of January 2024

measures undertaken. Limited resources (human and financial) at organisation and Charter level are a significant constraint.

Impacts at organisational level

Despite the challenges faced, a number of impacts arising from actions taken following support from Charters have been identified, including positive impact on organisational culture, reputational benefits, improved staff retention/recruitment and wellbeing, and innovation within organisations.

Key findings related to the EU Platform of Diversity Charters

The EU Platform, established in 2010, provides a range of support and services including:

- Charter Implementation toolkit (CIT)
- Diversity Self-assessment tool for organisations
- Newsletters
- Hosting of regular charter meetings (typically quarterly online and at least one per year in-person in Brussels)

The CIT, aimed at organisations running charters, provides guidance on building awareness, inspiring action, sharing resources and provides a range of online tools and checklists. The majority of charters responding to the survey found it either very useful or somewhat useful in their work. Limited information has been found on the use of the Diversity Self-assessment tool for organisations.

Overall feedback from the charter organisations responding to the survey was that the Platform provided useful information and that the regular meetings were beneficial, providing the opportunity to exchange information and learn from the experiences of others as well as access to specific training/learning opportunities. Some felt it could be expanded to benefit from the experience of other EU level networks, including industry and business organisations and sectoral organisations who could also promote membership of charters to their members. It was also suggested the network could promote a more consistent approach across charter organisations, in particular where discriminatory practices in the workplace and violations of employment law were concerned.

Recommendations

This report outlines a series of **recommendations for organisations/businesses**, including:

Formation of D&I Policies

- Secure leadership commitment and align with employee priorities
- Develop a compelling, tailored business case for D&I
- Implement and actively manage D&I policies
- Start simple; refine and improve policies over time
- Collect anonymous diversity data to identify gaps and set goals

Business Case for D&I

- Tailor the business case to your organisation's needs and sector
- Combine ethical motivations with economic arguments for D&I
- Craft a comprehensive, multi-dimensional business case

- Cover eight key areas: recruitment and retention; performance; innovation and creativity; problem solving and decision making; company reputation, customer satisfaction; organisational culture; fairness, equality and well-being.
- Use data and case studies to showcase D&I impacts and inspire others
- Leverage relevant EU Directives to embed D&I within your organisation
- Extend D&I across all business units and operations
- Emphasise that not prioritising D&I fails to address subtle systemic exclusions
- Acknowledge that increasing workforce diversity demands prioritising inclusivity for talent

Content of D&I Policies

- Cover both diversity AND inclusion to unlock full benefits
- Address all diversity dimensions to avoid narrow focus
- Use role models, champions and case studies to inspire
- Involve allies to strengthen D&I efforts organisation-wide
- Eliminate biases in recruitment and promotion processes
- Measure and benchmark D&I progress to identify improvements
- Provide tailored D&I training for leaders and wider staff members

Success Factors

- Acknowledge that creating a D&I culture requires sustained effort and holistic approaches
- Ensure commitment and comprehensive resources, including financial, human, and communication tools
- Build long-term structures over isolated actions for sustained change
- Combine top-down leadership with bottom-up employee engagement
- Embed an inclusive culture as a core organisational value

External Communication

- Highlight D&I commitment in external communication and outreach materials
- Tailor messaging to different diversity dimensions tactfully
- Balance business case messaging with genuine commitment to equity

A series of **recommendations for Charters** have been identified in the report. These include:

Coverage/outreach/targeting

- Become champions on voluntary disclosure of information on diversity and inclusion by organisations and publishing results to assist with benchmarking
- Promote Charter work and extend membership
- Collaborate and learn from other Charters
- Target leadership groups within organisations
- Mutualise and aggregate intelligence

- Work with federations and associations to better understand sectoral difference and expand and deepen support

Provision of tools and supports

- Offer as wide a range of services and supports as possible catering for the fact that organisations are at different stages in their D&I journey
- Develop digital tools for employers, e.g. AI tools for recruitment purposes
- Tailor services to the needs of signatories
- Support organisations to monitor progress of D&I implementation and embedment in the signatory organisations
- Offer/expand networking opportunities and exchange of case studies
- Provide high quality legal support where appropriate
- Enhance resources for Diversity Charters

The **recommendations for the European Commission** include:

Regulatory, Legal and Policy Provisions

- Strengthen implementation of existing legal and policy frameworks
- Evaluate legal gaps and address all diversity dimensions
- Foster cross-Commission collaboration on D&I regulatory frameworks
- Maintain D&I as a priority on political agendas
- Mandate monitoring, reporting, and compliance for equal opportunities
- Assess impacts of digitalisation and AI on D&I initiatives

Strengthen the knowledge base

- Highlight and disseminate evidence on the benefits of diversity and social inclusion
- Communicate ethical/fairness and economic aspects of a D&I business case
- Develop and share comprehensive D&I resources and training materials
- Consider developing a one-stop portal for D&I resources and tools
- Consider introducing a Practice Check and Consumer Voice Process for feedback

Capacity Building: Support, Tools, and Case Studies

- Tailor tools and services to stakeholder needs and contexts
- Promote Monitoring, Evaluation, and Learning (MEL) tools to assess D&I progress
- Create a digital platform for continuous Charter collaboration
- Ensure adequate resources for D&I, including financial and human support

Strengthen stakeholder engagement, outreach and dissemination

- Broaden the stakeholder base of the EU Platform of Diversity Charters by building partnerships and alliances
- Raise awareness of D&I evidence and its importance
- Collaborate through events, networking, learning, and sharing case studies
- Promote Charters and support expanding their membership and activities

- Engage Member States to advance D&I policies and exceed legal minimums
- Enhance the EU Platform's website and communication strategy

Provision of financial support

- Review existing funding models to support national D&I implementation
- Revise funding conditions to promote collaboration and shared tools
- Evaluate additional funding streams for future D&I initiatives

French version

Introduction

Ce rapport, réalisé dans le cadre de l'étude intitulée «Business case of diversity and inclusion (D&I) at work - impact of European Commission diversity and inclusion policies» (Étude sur le «Analyse de rentabilité de la diversité et de l'inclusion (D&I) au travail - impact des politiques de la Commission européenne en matière de diversité et d'inclusion»), donne un aperçu des arguments des entreprises en faveur du D&I sur l'impact des chartes de la diversité et de la plateforme des chartes de la diversité de l'UE, et formule des recommandations à l'intention des organisations/entreprises, des chartes de la diversité et de la Commission européenne.

Objectifs de l'étude et approche méthodologique

L'étude **visait** à explorer les avantages et l'analyse de rentabilisation des politiques et pratiques de D&I dans les organisations privées et publiques, et à évaluer l'impact de la signature d'une charte de la diversité sur la promotion de ces politiques et pratiques. L'étude a abordé **quatre questions de recherche** axées sur les coûts et avantages économiques et sociaux de D&I, l'impact de la plateforme de l'UE sur les chartes de la diversité, les résultats de la signature d'une charte de la diversité et les pratiques exemplaires de promotion de D&I. Couvrant à la fois les signataires et les non-signataires dans l'ensemble de l'UE, l'étude a examiné les données probantes internationales et s'est concentrée sur les organisations basées dans les 27 États membres de l'UE à partir de 2010, à la suite de la mise en place de la plateforme de l'UE sur les chartes de la diversité.

L'étude a appliqué une approche méthodologique solide alignée sur les lignes directrices de la Commission européenne pour une meilleure réglementation. Pour recueillir différents points de vue et idées, le processus de recherche a impliqué des revues de la littérature et des données, ainsi qu'un engagement des parties prenantes comprenant un sondage en ligne, des entretiens ciblés et des ateliers. Les conclusions et les recommandations ont été discutées et affinées lors d'un séminaire final avec les principales parties prenantes.

Principaux résultats de l'analyse de rentabilisation

Le **terme analyse de rentabilisation** est défini comme un concept large qui englobe une gamme d'impacts commerciaux/économiques, sociétaux, liés au bien-être et à l'équité, qui ont été évalués dans la littérature à l'aide d'une gamme de méthodes quantitatives et qualitatives. Les avantages de D&I dépendent de la mise en œuvre effective et de la présence de conditions-cadres de soutien, telles que l'investissement dans les mesures de D&I et le soutien de la direction.

L'étude recense **quatre analyses de rentabilisation interconnectées**:

- le cas de performance, présentant des avantages tels que l'amélioration de la prise de décision et de l'innovation;
- le dossier des talents, en mettant l'accent sur l'attraction et la rétention des meilleurs talents;
- le cas de représentation, qui renforce la légitimité et la compréhension du client;
- l'affaire de la responsabilité sociale des entreprises (RSE), la promotion de la justice sociale et l'amélioration de la réputation organisationnelle.

Ensemble, ces cas fournissent une justification convaincante pour donner la priorité à D&I dans toutes les organisations et les décideurs politiques.

Avantages liés au recrutement et à la fidélisation du personnel

Les politiques de diversité dans le recrutement renforcent l'attractivité organisationnelle, élargissent les réserves de candidats et stimulent les intentions de recherche d'emploi, en particulier par des déclarations de diversité dans les annonces d'emploi qui résonnent positivement avec les groupes sous-représentés tout en attirant l'ensemble de la main-d'œuvre. Les organisations des secteurs privé et public bénéficient des pratiques en matière de diversité. Des politiques inclusives leur permettent d'attirer les meilleurs talents, d'améliorer la réputation des employeurs et de remédier aux pénuries de compétences spécialisées dans des domaines concurrentiels.

Les politiques de diversité en matière de rétention des employés apportent des avantages tels qu'une réduction des intentions de rotation, un engagement organisationnel accru et une plus grande satisfaction au travail. Un environnement de diversité positif, caractérisé par l'égalité des chances, des mesures de lutte contre la discrimination et des initiatives d'inclusion, favorise un sentiment d'appartenance et de justice. Cela a une incidence particulière sur le maintien en poste des groupes sous-représentés, notamment les femmes, les personnes LGBTIQ, les minorités ethnoculturelles et employés issus de la diversité religieuse. Cependant, la perception des politiques de diversité peut varier, certaines études notant l'insatisfaction parmi les groupes majoritaires, soulignant l'importance de stratégies d'inclusion soigneusement conçues pour équilibrer les besoins de tous les employés. Certaines études soulignent également le risque de perception négative de la diversité et des déclarations d'inclusion des groupes sous-représentés dans les offres d'emploi.

Avantages en termes de performance

Les politiques de D&I améliorent considérablement les performances organisationnelles en améliorant les résultats financiers, l'innovation, la satisfaction des clients et l'efficacité des équipes dans le secteur privé et public. Des études montrent que des équipes diversifiées comprennent mieux et s'engagent avec des marchés et des clients variés, ce qui entraîne une rentabilité et des revenus d'innovation plus élevés. Dans le secteur public, les efforts de D&I soutiennent les objectifs d'innovation et de développement tout en favorisant une main-d'œuvre qui reflète la diversité des populations, améliorant ainsi la prestation de services et l'atteinte des objectifs de RSE.

Avantages de l'innovation et de la créativité

La diversité cognitive, englobant des perspectives, des compétences et des expériences variées, est cruciale pour favoriser l'innovation en réduisant les préjugés inconscients et en empêchant la pensée de groupe, améliorant ainsi la pensée critique et la prise de décision. La recherche souligne que les équipes profitent le plus de la diversité lorsqu'elles intègrent activement des idées diverses, valorisent les points de vue des autres et adaptent les processus décisionnels. En outre, les preuves suggèrent que les organisations du secteur public peuvent également obtenir des avantages en recrutant des personnes diverses.

Avantages liés à la résolution de problèmes et à la prise de décision

Un environnement inclusif où diverses perspectives sont valorisées améliore la prise de décision en réduisant les préjugés, en encourageant une analyse complète et en favorisant des solutions innovantes, au bénéfice des individus et des organisations. Des équipes diversifiées dans les secteurs privé et public comprennent et répondent mieux aux besoins de clientèles ou de populations variées, ce qui conduit à des décisions qui s'alignent sur les demandes du marché ou sur des politiques publiques efficaces.

Avantages pour la réputation de l'entreprise

Les politiques de D&I améliorent la réputation de l'entreprise en répondant aux attentes des parties prenantes en matière d'équité, l'égalité et de responsabilité sociale. Ceci, à son tour, aide à attirer les talents, à renforcer les relations avec les clients et à améliorer la compétitivité. Les entreprises ayant une main-d'œuvre diversifiée sont considérées comme progressistes et socialement responsables, attirant les marchés multiculturels, les consommateurs socialement conscients et les investisseurs axés sur les facteurs ESG, tandis que les pratiques d'exclusion risquent de nuire à la réputation par le biais de poursuites judiciaires et d'un examen public. Malgré des preuves notables sur les avantages pour la réputation du sexe et de la diversité raciale ou ethnique, des lacunes subsistent dans la recherche sur la neurodiversité, le handicap, l'inclusion socio-économique et la diversité religieuse.

Avantages liés à la satisfaction des consommateurs

Une main-d'œuvre diversifiée renforce la capacité d'une organisation à comprendre et à répondre aux besoins d'une clientèle diversifiée, ce qui entraîne une plus grande satisfaction de la clientèle, une meilleure qualité de service et de meilleures relations avec la clientèle. Des études montrent que la diversité favorise l'engagement et la fidélité des clients en favorisant une meilleure compréhension des préférences des clients, ce qui permet des produits et des services plus personnalisés. Dans le secteur public, une main-d'œuvre qui reflète la diversité de la population améliore la prestation des services, aborde efficacement les nuances culturelles et favorise la confiance et l'équité dans les services publics, renforçant ainsi les relations entre le gouvernement et les citoyens. La diversité contribue également à une réputation positive, renforçant la confiance et la fidélité des clients grâce à l'alignement sur les valeurs de la RSE.

Avantages de la culture organisationnelle

La culture organisationnelle, formée par des valeurs écrites et non écrites, influence le comportement des employés et contribue au succès d'une entreprise. Les politiques de D&I aident non seulement le recrutement et le maintien en poste, mais favorisent également une culture inclusive, entraînant des changements structurels, améliorant le partage de l'information, augmentant la satisfaction au travail et améliorant le rendement global, en particulier pour les employés diversifiés.

Avantages liés à l'équité et à l'équité

Les politiques de D&I sont cruciales pour promouvoir et renforcer l'équité, l'égalité et la cohésion sociale, en particulier dans le secteur public, qui a la responsabilité unique de promouvoir la justice sociale et de lutter contre les inégalités historiques. En donnant la priorité à D&I, les organisations peuvent créer des lieux de travail plus inclusifs, renforcer l'équité sociétale et contribuer aux gains macroéconomiques grâce à une meilleure allocation des ressources, à la résilience du marché et à la réduction des inégalités systémiques.

Autres avantages potentiels d'une mise en œuvre plus large des politiques et pratiques de D&I en Europe

L'analyse met en évidence des progrès lents mais constants dans la mise en œuvre des politiques de D&I au sein des organisations européennes, de nombreuses entreprises donnant la priorité à D&I et certaines reconnaissant sa valeur économique. Toutefois, des défis subsistent, notamment la maturité limitée des programmes D&I et l'attention insuffisante accordée à toutes les dimensions de la diversité, avec des programmes d'inclusion en faveur de la diversité et d'inclusion ciblant uniquement certaines dimensions. En outre, les petites entreprises manquent souvent de données et de transparence sur les

pratiques de D&I, tandis que les incohérences méthodologiques dans les données disponibles limitent la capacité d'établir des comparaisons complètes ou de mesurer l'impact total de ces initiatives.

Les lacunes qui subsistent dans les politiques et pratiques de D&I mettent en évidence le potentiel d'avantages plus importants avec une mise en œuvre plus large et plus complète. S'attaquer aux disparités entre les sexes et les âges au sein de la main-d'œuvre peut élargir les réserves de talents et améliorer la performance des entreprises, tout en intégrant la diversité ethnoculturelle, ce qui peut stimuler l'efficacité économique compte tenu de leur représentation significative dans les cohortes plus jeunes. De même, la promotion de l'inclusion des personnes LGBTIQ offre des avantages substantiels aux employeurs et à la société, bien que la discrimination sur le lieu de travail continue de poser des problèmes. Ces résultats mettent en évidence la nécessité de politiques D&I robustes qui englobent toutes les dimensions de la diversité pour générer des gains organisationnels et sociétaux.

Les coûts macroéconomiques de la discrimination sur le marché du travail et sur le lieu de travail sont importants et des estimations indicatives sont fournies pour la discrimination fondée sur la race ou l'origine ethnique, le sexe et l'âge. La contribution potentielle des politiques de D&I à la croissance macroéconomique est donc substantielle, même dans un scénario où les politiques de D&I s'attaquent à une petite partie des coûts macroéconomiques de la discrimination.

Principales conclusions sur l'impact des chartes de la diversité

Adhésion à la Charte de la diversité

La Commission européenne a commencé à financer une plateforme des chartes de la diversité au niveau de l'UE en 2010 et couvre désormais l'ensemble des 27 États membres, près de 17 500 organisations² ayant signé des chartes nationales de la diversité au début de 2024. La moitié des 10 organisations gérant des chartes qui ont été interrogées au cours de l'étude ont indiqué qu'elles comptaient un nombre important de PME en tant que signataires, mais un certain nombre ont également indiqué qu'il était difficile d'atteindre les organisations rurales.

Création et mise en place de chartes de la diversité

Les structures de gouvernance et de financement des organisations nationales qui gèrent les chartes de la diversité varient d'un État membre à l'autre, certaines fonctionnant sur la base de ressources financières limitées ou à titre gracieux et d'autres facturant des cotisations ou recevant un financement externe provenant de ressources d'État.

Motivations pour adhérer aux Chartes de la diversité

Les raisons les plus souvent citées pour devenir signataire d'une charte étaient la promotion de la diversité et au bénéfice de la société, ainsi que l'accès au soutien à la mise en œuvre des politiques D&I à travers les outils, les conseils et le soutien à la mise en réseau fournis par les chartes et pour promouvoir l'engagement des employés et l'innovation au sein des organisations. L'image de marque de l'entreprise et l'amélioration de l'image d'une organisation ont également été considérées comme un avantage important. D'un autre côté, certaines raisons de ne pas devenir signataire comprenaient le fait que l'organisation ne voyait aucun besoin immédiat ou envisageait de s'y joindre à l'avenir.

Zones couvertes et services fournis

² Données sur les signataires reçues de la Commission européenne en janvier 2024

Les chartes diffèrent dans les domaines thématiques de D&I qu'elles couvrent, le genre/sexe, le handicap/la capacité, l'orientation sexuelle, les personnes LGBTIQ et l'origine raciale ou ethnique et la religion ou les convictions étant largement couverts. En ce qui concerne les services offerts, le soutien à la création de politiques de D&I (grâce à l'élaboration de plans d'action et de programmes), la formation, les campagnes de sensibilisation, la recherche et les publications, ainsi que les ateliers, les conférences et la mise en réseau sont largement fournis. Échanger des informations sur les meilleures pratiques en matière de D&I est considéré par de nombreux signataires comme une ressource précieuse.

Mesures prises par les signataires

En tant que signataires d'une charte, de nombreuses organisations ayant répondu à l'enquête menée dans le cadre de l'étude ont indiqué qu'elles avaient pris des mesures positives pour améliorer D&I au sein de leur organisation. Cela comprend l'autodiagnostic pour évaluer le statut D&I, la participation aux événements et campagnes D&I, la participation du personnel aux cours de formation et aux séminaires. D'autres exemples incluent l'élaboration et l'introduction de politiques et d'actions spécifiques de D&I (y compris le suivi des progrès) dans l'ensemble de l'organisation.

Facteurs facilitants et défis

La participation du leadership au sein des organisations a été identifiée comme étant un facteur critique permettant de réaliser des progrès et l'enrichissement mutuel des approches et des stratégies entre les organisations a également été mis en évidence.

Bien que des progrès aient été réalisés en matière de D&I parmi les signataires, certains obstacles et défis majeurs subsistent, notamment la suppression des préjugés culturels enracinés, la résistance au changement/le manque de motivation au sein des organisations et la mesure des progrès/impacts des mesures prises. Les ressources limitées (humaines et financières) au niveau de l'organisation et de la Charte constituent une contrainte importante.

Impacts au niveau organisationnel

Malgré les défis rencontrés, un certain nombre d'incidences découlant des mesures prises à la suite du soutien apporté par les chartes ont été recensées, notamment une incidence positive sur la culture organisationnelle, les avantages pour la réputation, l'amélioration de la rétention/du recrutement et du bien-être du personnel, et l'innovation au sein des organisations.

Principales conclusions relatives à la plateforme de l'UE sur les chartes de la diversité

La plateforme de l'UE, créée en 2010, fournit une série de services et de soutien, notamment:

- Boîte à outils pour la mise en œuvre de la Charte (CIT)
- Outil d'auto-évaluation de la diversité pour les organisations
- Bulletins d'information
- Organisation de réunions régulières (généralement trimestrielles en ligne et au moins une par an en présentiel à Bruxelles)

Le CIT, visé aux organisations qui gèrent des chartes, fournit des conseils sur la sensibilisation, l'action inspirante, le partage de ressources et fournit une gamme d'outils et de listes de contrôle en ligne. La majorité des chartes qui ont répondu à l'enquête l'ont

trouvée très utile ou quelque peu utile dans leur travail. Peu d'informations ont été trouvées sur l'utilisation de l'outil d'auto-évaluation de la diversité pour les organisations.

Dans l'ensemble, les organisations à charte qui ont répondu à l'enquête ont indiqué que la plateforme fournissait des informations utiles et que les réunions régulières étaient bénéfiques, offrant la possibilité d'échanger des informations et d'apprendre des expériences d'autres organisations, ainsi que l'accès à des possibilités spécifiques de formation/d'apprentissage. Certains ont estimé qu'il pourrait être étendu pour bénéficier de l'expérience d'autres réseaux au niveau de l'UE, y compris des organisations industrielles et commerciales et des organisations sectorielles qui pourraient également promouvoir l'adhésion à des chartes auprès de leurs membres. Il a également été suggéré que le réseau puisse promouvoir une approche plus cohérente entre les organisations à charte, en particulier en ce qui concerne les pratiques discriminatoires sur le lieu de travail et les violations du droit du travail.

Recommandations

Le présent rapport présente une série de **recommandations à l'intention des organisations/entreprises**, notamment:

Formation des politiques D&I

- Sécuriser l'engagement du leadership et s'aligner sur les priorités des employés
- Développer une analyse de rentabilisation convaincante et personnalisée pour D&I
- Mettre en œuvre et gérer activement les politiques D&I
- Commencer simplement; affiner et améliorer les politiques au fil du temps
- Recueillir des données anonymes sur la diversité pour identifier les lacunes et fixer des objectifs

Analyse de rentabilisation pour D&I

- Adapter l'analyse de rentabilisation aux besoins et au secteur de votre organisation
- Combiner les motivations éthiques avec des arguments économiques pour D&I
- Concevoir une analyse de rentabilisation complète et multidimensionnelle
- Couvrez huit domaines clés: le recrutement et le maintien en poste; les performances; l'innovation et la créativité; résolution de problèmes et prise de décision; réputation de l'entreprise, satisfaction du client; la culture organisationnelle; l'équité, l'égalité et le bien-être.
- Utiliser des données et des études de cas pour mettre en valeur les impacts de D&I et inspirer les autres
- Tirer parti des directives européennes pertinentes pour intégrer D&I au sein de votre organisation
- Étendre D&I à toutes les unités d'affaires et opérations
- Souligner que ne pas donner la priorité au D&I ne permet pas de remédier aux exclusions systémiques subtiles
- Reconnaître que l'augmentation de la diversité de la main-d'œuvre exige de donner la priorité à l'inclusion des talents

Contenu des politiques de D&I

- Couvrir à la fois la diversité et l'inclusion pour débloquer tous les avantages
- Aborder toutes les dimensions de la diversité pour éviter une focalisation étroite
- Utiliser des modèles, des champions et des études de cas pour inspirer
- Impliquer les alliés pour renforcer les efforts de D&I à l'échelle de l'organisation
- Éliminer les biais dans les processus de recrutement et de promotion
- Mesurer et comparer D&I progressivement pour identifier les améliorations
- Offrir une formation D&I sur mesure aux dirigeants et aux membres du personnel au sens large

Facteurs de succès

- Reconnaître que la création d'une culture D&I nécessite des efforts soutenus et des approches holistiques
- Assurer un engagement et des ressources complètes, y compris des outils financiers, humains et de communication
- Construire des structures à long terme plutôt que des actions isolées pour un changement durable
- Combinez le leadership descendant avec l'engagement ascendant des employés
- Intégrer une culture inclusive en tant que valeur organisationnelle fondamentale

Communication externe

- Mettre en évidence l'engagement de D&I dans la communication externe et le matériel de sensibilisation
- Adapter les messages aux différentes dimensions de la diversité avec tact
- Équilibrer les messages d'analyse de rentabilisation avec un véritable engagement envers l'équité

Une série de **recommandations pour les chartes** ont été identifiées dans le rapport. Il s'agit notamment:

Couverture/sensibilisation/ciblage

- Devenir des champions de la divulgation volontaire d'informations sur la diversité et l'inclusion par les organisations et publier les résultats pour aider à l'analyse comparative
- Promouvoir le travail de la Charte et étendre l'adhésion
- Collaborer et apprendre des autres Chartes
- Cibler les groupes de direction au sein des organisations
- Mutualiser et agréger l'intelligence
- Travailler avec les fédérations et les associations pour mieux comprendre les différences sectorielles et élargir et approfondir le soutien

Fourniture d'outils et de supports

- Offrir une gamme de services et de soutiens aussi large que possible en tenant compte du fait que les organisations se trouvent à différents stades de leur parcours D&I
- Développer des outils numériques pour les employeurs, par exemple des outils d'IA à des fins de recrutement
- Adapter les services aux besoins des signataires
- Aider les organisations à suivre les progrès de la mise en œuvre et de l'intégration de D&I dans les organisations signataires
- Offrir/élargir les possibilités de réseautage et d'échange d'études de cas
- Fournir un soutien juridique de haute qualité, le cas échéant
- Améliorer les ressources pour les chartes de la diversité

Les **recommandations adressées à la Commission européenne** sont les suivantes:

Dispositions réglementaires, juridiques et politiques

- Renforcer la mise en œuvre des cadres juridiques et politiques existants
- Évaluer les lacunes juridiques et aborder toutes les dimensions de la diversité
- Favoriser la collaboration inter-Commission sur les cadres réglementaires D&I
- Maintenir D&I comme une priorité sur les agendas politiques
- Mandat de surveillance, d'établissement de rapports et de conformité pour l'égalité des chances
- Évaluer les incidences de la numérisation et de l'IA sur les initiatives D&I

Renforcer la base de connaissances

- Mettre en évidence et diffuser des données probantes sur les avantages de la diversité et de l'inclusion sociale
- Communiquer les aspects éthiques/équitable et économiques d'une analyse de rentabilisation D&I
- Développer et partager des ressources et du matériel de formation D&I complets
- Envisager de créer un portail unique pour les ressources et les outils de D&I
- Envisager d'introduire un processus de vérification des pratiques et de voix des consommateurs pour les commentaires

Renforcement des capacités: Support, outils et études de cas

- Adapter les outils et les services aux besoins et aux contextes des parties prenantes
- Promouvoir les outils de suivi, d'évaluation et d'apprentissage pour évaluer les progrès de D&I
- Créer une plateforme numérique pour une collaboration continue dans le cadre de la Charte
- Assurer des ressources adéquates pour D&I, y compris un soutien financier et humain

Renforcer l'engagement, la sensibilisation et la diffusion des parties prenantes

- Élargir la base des parties prenantes de la plateforme de l'UE sur les chartes de la diversité en établissant des partenariats et des alliances
- Sensibiliser le public aux preuves de D&I et à son importance
- Collaborer par le biais d'événements, de réseautage, d'apprentissage et de partage d'études de cas
- Promouvoir les chartes et soutenir l'élargissement de leurs membres et de leurs activités
- Engager les États membres à faire progresser les politiques de D&I et à dépasser les minimums légaux
- Améliorer le site web et la stratégie de communication de la plateforme de l'UE

Fourniture d'un soutien financier

- Examiner les modèles de financement existants pour soutenir la mise en œuvre nationale de D&I
- Réviser les conditions de financement pour promouvoir la collaboration et les outils partagés
- Évaluer les sources de financement supplémentaires pour les futures initiatives de D&I

German version

Einleitung

Dieser Bericht, der im Rahmen der Studie „Business Case von Diversität und Integration (D&I) am Arbeitsplatz - Auswirkungen der Politik der Europäischen Kommission für Vielfalt und Integration“ durchgeführt wurde, bietet Einblicke in den Business Case für D&I am Arbeitsplatz, über die Auswirkungen von Chartas der Vielfalt und der EU-Plattform für Chartas der Vielfalt und gibt Empfehlungen für Organisationen/Unternehmen, die Chartas der Vielfalt und die Europäische Kommission.

Studienziele und methodischer Ansatz

Ziel der **Studie war es**, die Vorteile und Business Case für D&I-Politiken und -Praktiken in privaten und öffentlichen Organisationen zu untersuchen und die Auswirkungen der Unterzeichnung einer Charta der Vielfalt auf die Förderung dieser Politiken und Praktiken zu bewerten. Die Studie befasste sich mit **vier Forschungsfragen**, die sich auf die wirtschaftlichen und sozialen Kosten und den Nutzen von D&I, die Auswirkungen der EU-Plattform für Chartas der Vielfalt, die Ergebnisse der Unterzeichnung einer Charta der Vielfalt und beispielhafte Praktiken zur Förderung von D&I konzentrierten. Die Studie, die sowohl Unterzeichner als auch Nicht-Unterzeichner in der gesamten EU abdeckt, untersuchte internationale Erkenntnisse seit dem Jahr 2010 (nachdem die EU-Plattform für Chartas der Vielfalt eingerichtet wurde) und konzentrierte sich auf Organisationen mit Sitz in den 27 EU-Mitgliedstaaten.

In der Studie wurde ein solider methodischer Ansatz angewandt, der mit den Leitlinien der Europäischen Kommission für eine bessere Rechtsetzung in Einklang steht. Um verschiedene Perspektiven und Erkenntnisse zu sammeln, umfasste der Forschungsprozess Literatur- und Datenrecherchen sowie eine Stakeholder-Konsultationen, darunter eine Online-Umfrage, gezielte Interviews und Workshops. Die Ergebnisse und Empfehlungen wurden in einem Abschlussseminar mit den wichtigsten Interessengruppen erörtert und verfeinert.

Wichtigste Erkenntnisse zum Business Case

Der **Begriff Business Case** wird in diesem Bericht als ein weites Konzept definiert, das eine Reihe von geschäftlichen / wirtschaftlichen, gesellschaftlichen, wohlfahrts- und gerechtigkeitsbezogenen Auswirkungen umfasst, die in der Literatur mit einer Reihe von quantitativen und qualitativen Methoden bewertet wurden. Der Nutzen von D&I hängt von der effektiven Umsetzung und dem Vorhandensein unterstützender Rahmenbedingungen, wie z.B. Investitionen in D&I-Maßnahmen und die Unterstützung durch das Top-Management, ab.

In der Studie werden **vier miteinander verbundene Business Cases** ermittelt:

- die Leistungsvorteile, die Vorteile wie verbesserte Entscheidungsfindung und Innovation aufzeigen;
- die Talentvorteile, die sich auf die Gewinnung und Bindung von Spitzentalenten konzentrieren;
- die Vorteile der Repräsentation, die die Legitimität und das Verständnis der Kunden erhöht;
- die soziale Verantwortung der Unternehmen (CSR), die sich auf die soziale Gerechtigkeit und die Verbesserung des Rufs des Unternehmens konzentriert..

Zusammengenommen liefern diese Argumente eine überzeugende Begründung für die Priorisierung von D&I in Organisationen und bei politischen Entscheidungsträgern.

Rekrutierungs- und Mitarbeiterbindungsvorteile

Maßnahmen zur Förderung der Vielfalt bei der Einstellung erhöhen die Attraktivität des Unternehmens, erweitern den Bewerberpool und steigern die Bereitschaft, eine Stelle anzustreben, insbesondere durch Erklärungen zur Vielfalt in Stellenanzeigen, die bei unterrepräsentierten Gruppen auf positive Resonanz stoßen und gleichzeitig die breitere Belegschaft ansprechen. Sowohl Organisationen des privaten als auch des öffentlichen Sektors können von D&I-Praktiken profitieren. Inklusive Maßnahmen ermöglichen es ihnen, Top-Talente anzuziehen, ihren Ruf als Arbeitgeber zu verbessern und den Fachkräftemangel in Sektoren mit starkem Wettbewerb zu beheben.

Maßnahmen zur Förderung der Vielfalt bei der Mitarbeiterbindung bringen Vorteile wie eine geringere Fluktuation, eine stärkere Bindung der Mitarbeiter an das Unternehmen und eine höhere Arbeitszufriedenheit. Ein der Vielfalt förderliches Umfeld, das durch Chancengleichheit, Antidiskriminierungsmaßnahmen und Eingliederungsinitiativen gekennzeichnet ist, fördert ein Gefühl der Zugehörigkeit und Gerechtigkeit. Dies wirkt sich besonders auf die Beibehaltung unterrepräsentierter Gruppen aus, darunter Frauen, LGBTIQ, ethnokulturelle Minderheiten und Mitarbeiter mit unterschiedlichen religiösen Überzeugungen. Die Wahrnehmung der Diversitätspolitik kann jedoch variieren, wobei einige Studien Unzufriedenheit unter den Mehrheitsgruppen feststellen und die Bedeutung sorgfältig konzipierter Inklusionsstrategien hervorheben, um die Bedürfnisse aller Mitarbeiter in Einklang zu bringen. Einige Studien weisen auch auf das Risiko hin, dass unterrepräsentierte Gruppen Erklärungen über Vielfalt und Integration in Stellenanzeigen negativ wahrnehmen.

Leistungsvorteile

D&I-Maßnahmen steigern die Leistung von Unternehmen erheblich, indem sie die finanziellen Ergebnisse, die Innovation, die Kundenzufriedenheit und die Effizienz von Teams im privaten und öffentlichen Sektor verbessern. Einige Studien zeigen, dass vielfältige Teams unterschiedliche Märkte und Kunden besser verstehen und sich auf sie einlassen, was zu höherer Rentabilität und Innovationseinnahmen führt. Im öffentlichen Sektor unterstützen D&I-Bemühungen Innovations- und Entwicklungsziele und fördern gleichzeitig eine Belegschaft, die die Vielfalt der Bevölkerung widerspiegelt, wodurch die Erbringung von Dienstleistungen verbessert und CSR-Ziele erreicht werden.

Vorteile für Innovation und Kreativität

Kognitive Vielfalt, die unterschiedliche Perspektiven, Fähigkeiten und Erfahrungen umfasst, ist entscheidend für die Förderung von Innovation, da sie unbewusste Voreingenommenheit reduziert und Gruppendenken verhindert und so kritisches Denken und Entscheidungsfindung verbessert. Studien zeigen, dass Teams am meisten von der Vielfalt profitieren, wenn sie unterschiedliche Ideen aktiv einbeziehen, die Perspektiven anderer wertschätzen und Entscheidungsprozesse anpassen. Darüber hinaus gibt es Anhaltspunkte dafür, dass auch Organisationen des öffentlichen Sektors durch die Einstellung vielfältiger Mitarbeiter Vorteile erzielen können.

Vorteile bei der Problemlösung und Entscheidungsfindung

Ein integratives Umfeld, in dem unterschiedliche Perspektiven geschätzt werden, verbessert die Entscheidungsfindung, indem es Voreingenommenheit abbaut, umfassende Analysen fördert und innovative Lösungen begünstigt, wovon sowohl Einzelpersonen als auch Organisationen profitieren. Vielfältige Teams sowohl im privaten als auch im öffentlichen Sektor können auch die Bedürfnisse unterschiedlicher Kunden oder

Bevölkerungsgruppen besser verstehen und berücksichtigen, was zu Entscheidungen führt, die mit den Anforderungen des Marktes oder einer wirksamen öffentlichen Politik in Einklang stehen.

Reputationsvorteile

D&I-Maßnahmen verbessern den Ruf des Unternehmens, indem sie die Erwartungen der Stakeholder in Bezug auf Gerechtigkeit, Fairness und soziale Verantwortung erfüllen. Dies wiederum hilft, Talente anzuziehen, Kundenbeziehungen zu stärken und die Wettbewerbsfähigkeit zu verbessern. Unternehmen mit einer vielfältigen Belegschaft werden als fortschrittlich und sozial verantwortlich angesehen und sind für multikulturelle Märkte, sozial bewusste Verbraucher und ESG-orientierte Investoren attraktiver, während ausgrenzende Praktiken den Ruf durch Klagen und öffentliche Kontrolle schädigen können. Trotz bemerkenswerter Beweise für die Reputationsvorteile von geschlechtlicher und ethnischer Vielfalt gibt es nach wie vor Forschungslücken in Bezug auf neurodynamische Vielfalt, Behinderung, sozioökonomische Integration und religiöse Vielfalt.

Vorteile für die Zufriedenheit der Verbraucher

Eine vielfältige Belegschaft stärkt die Fähigkeit eines Unternehmens, die Bedürfnisse eines vielfältigen Kundenstamms zu verstehen und zu erfüllen, was zu höherer Kundenzufriedenheit, besserer Servicequalität und besseren Kundenbeziehungen führt. Studien zeigen, dass Vielfalt das Engagement und die Loyalität der Kunden fördert, indem sie tiefere Einblicke in die Präferenzen der Kunden ermöglicht, was wiederum zu besser zugeschnittenen Produkten und Dienstleistungen führt. Im öffentlichen Sektor verbessert eine Belegschaft, die die Vielfalt der Bevölkerung widerspiegelt, die Erbringung von Dienstleistungen, geht wirksam auf kulturelle Nuancen ein und fördert das Vertrauen und die Gleichberechtigung im öffentlichen Dienst, was die Beziehungen zwischen Regierung und Bürgern weiter stärkt. Vielfalt trägt auch zu einem positiven Ruf bei und stärkt das Vertrauen und die Loyalität der Kunden durch die Ausrichtung an den CSR-Werten.

Vorteile der Organisationskultur

Die Unternehmenskultur, die sowohl durch geschriebene als auch durch ungeschriebene Werte geprägt ist, beeinflusst das Verhalten der Mitarbeiter und trägt zum Erfolg eines Unternehmens bei. D&I-Maßnahmen helfen nicht nur bei der Rekrutierung und Bindung von Mitarbeitern, sondern fördern auch eine integrative Kultur, indem sie strukturelle Veränderungen vorantreiben, den Informationsaustausch verbessern, die Arbeitszufriedenheit erhöhen und die Gesamtleistung steigern, vor allem bei Mitarbeitern aus unterrepräsentierten Gruppen.

Fairness- und Gerechtigkeitsvorteile

D&I-Maßnahmen sind entscheidend für die Förderung und Stärkung von Fairness, Gerechtigkeit und sozialem Zusammenhalt, insbesondere im öffentlichen Sektor, der eine besondere Verantwortung für die Förderung sozialer Gerechtigkeit und die Beseitigung historischer Ungleichheiten trägt. Durch die Priorisierung von D&I können Organisationen integrativere Arbeitsplätze schaffen, die gesellschaftliche Fairness erhöhen und zu makroökonomischen Gewinnen durch eine bessere Ressourcenallokation, die Widerstandsfähigkeit des Marktes und den Abbau systemischer Ungleichheiten beitragen.

Mögliche weitere Vorteile einer breiteren Umsetzung von D&I-Politiken und -Praktiken in Europa

Die Analyse zeigt langsame, aber stetige Fortschritte bei der Umsetzung von D&I-Politiken in europäischen Organisationen, wobei viele Unternehmen der D&I-Priorität einräumen und einige auch ihren wirtschaftlichen Wert anerkennen. Allerdings gibt es nach wie vor

Herausforderungen, wie z. B. die begrenzte Reife von D&I-Programmen und die unzureichende Konzentration auf alle Diversitätsdimensionen, wobei einige Diversitäts- und Integrationsprogramme nur auf ausgewählte Dimensionen ausgerichtet sind. Darüber hinaus mangelt es kleineren Unternehmen oft an Daten und Transparenz zu D&I-Praktiken, während methodische Unstimmigkeiten in den verfügbaren Daten die Möglichkeit einschränken, umfassende Vergleiche anzustellen oder die volle Wirkung dieser Initiativen zu messen.

Die verbleibenden Lücken in den D&I-Strategien und -Praktiken verdeutlichen das Potenzial für größere Vorteile durch eine breitere und umfassendere Umsetzung. Die Beseitigung geschlechts- und altersbedingter Ungleichheiten in der Belegschaft kann den Talentpool erweitern und die Unternehmensleistung verbessern, während die ethnisch-kulturelle Vielfalt die wirtschaftliche Effizienz steigern kann, da sie in jüngeren Jahrgängen stärker vertreten ist. Auch die Förderung der Inklusion von LGBTIQ-Personen bietet erhebliche Vorteile für Arbeitgeber und Gesellschaft, auch wenn Diskriminierung am Arbeitsplatz nach wie vor ein Problem darstellt. Diese Ergebnisse unterstreichen die Notwendigkeit einer soliden D&I-Politik, die alle Diversitätsdimensionen umfasst, um organisatorische und gesellschaftliche Vorteile zu erzielen.

Die makroökonomischen Kosten von Diskriminierung auf dem Arbeitsmarkt und am Arbeitsplatz sind beträchtlich, und es werden illustrative Schätzungen für Diskriminierung aufgrund von Rasse oder ethnischer Herkunft, Geschlecht und Alter vorgelegt. Der potenzielle Beitrag von D&I-Maßnahmen zum makroökonomischen Wachstum ist daher erheblich, selbst in einem Szenario, in dem D&I-Maßnahmen nur einen kleinen Teil der makroökonomischen Kosten von Diskriminierung angehen.

Wichtige Erkenntnisse zu den Auswirkungen von Chartas der Vielfalt

Mitgliedschaft in Diversity Charters

Die Europäische Kommission hat 2010 mit der Finanzierung einer Plattform für Chartas der Vielfalt auf EU-Ebene begonnen und deckt nun alle 27 Mitgliedstaaten ab. Bis Anfang 2024³ haben fast 17.500 Organisationen nationale Chartas der Vielfalt unterzeichnet. Die Hälfte der zehn Organisationen, die Chartas betreiben und im Rahmen der Studie befragt wurden, gaben an, dass sie eine beträchtliche Anzahl von KMU als Unterzeichner hatten, aber eine Reihe wies auch darauf hin, dass es schwierig sei, ländliche Organisationen zu erreichen.

Einrichtung und Aufbau von Chartas der Vielfalt

Die Führungs- und Finanzierungsstrukturen der nationalen Organisationen, die die Chartas der Vielfalt betreiben, unterscheiden sich von Mitgliedstaat zu Mitgliedstaat, wobei einige mit begrenzten finanziellen Mitteln oder auf Pro-bono-Basis arbeiten und andere Mitgliedsbeiträge erheben oder externe Mittel aus staatlichen Ressourcen erhalten.

Beweggründe für den Beitritt zu Chartas der Vielfalt

Die am häufigsten genannten Gründe für den Beitritt zu einer Charta waren die Förderung der Vielfalt und der Nutzen für die Gesellschaft sowie der Zugang zu Unterstützung bei der Umsetzung von D&I-Politiken durch die von den Chartas bereitgestellten Instrumente, Beratung und Netzwerkunterstützung und die Förderung von Mitarbeiterengagement und Innovation in Organisationen. Das Branding des Unternehmens und die Verbesserung des Images einer Organisation wurden ebenfalls als wichtiger Nutzen angesehen. Auf der anderen Seite wurde als Grund für den Nichtbeitritt angegeben, dass die Organisation keinen unmittelbaren Bedarf sah oder einen Beitritt in der Zukunft plante.

³ Von der Europäischen Kommission erhaltene Daten zu den Unterzeichnern (Stand: Januar 2024)

Abgedeckte Bereiche und erbrachte Dienstleistungen

Die Chartas unterscheiden sich in den thematischen Bereichen von D&I, die sie abdecken, wobei Geschlecht/Gender, Behinderung, sexuelle Orientierung, LGBTIQ und Rasse oder ethnische Herkunft sowie Religion oder Weltanschauung weitgehend abgedeckt sind. Was die angebotenen Dienstleistungen betrifft, so werden in großem Umfang Unterstützung bei der Erstellung von D&I-Politiken (durch die Entwicklung von Aktionsplänen und Programmen), Schulungen, Sensibilisierungskampagnen, Forschung und Veröffentlichungen sowie Workshops, Konferenzen und Vernetzung angeboten. Der Austausch von Informationen über bewährte Praktiken im Bereich D&I wird von vielen Unterzeichnern als wertvolle Ressource betrachtet.

Von den Unterzeichnern ergriffene Maßnahmen

Viele Organisationen, die auf die im Rahmen der Studie durchgeführte Umfrage geantwortet haben, gaben an, dass sie infolge der Unterzeichnung einer Charta positive Maßnahmen zur Verbesserung von D&I in ihrer Organisation ergriffen haben. Dazu gehören die Selbstdiagnose zur Bewertung des D&I-Status, die Teilnahme an D&I-Veranstaltungen und -Kampagnen sowie die Teilnahme der Mitarbeiter an Schulungen und Seminaren. Weitere Beispiele sind die Entwicklung und Einführung spezifischer D&I-Strategien und -Aktionen (einschließlich der Überwachung der Fortschritte) in der gesamten Organisation.

Erleichternde Faktoren und Herausforderungen

Die Beteiligung von Führungskräften innerhalb von Organisationen wurde als kritischer Faktor identifiziert, der Fortschritte ermöglicht, und die gegenseitige Befruchtung von Ansätzen und Strategien zwischen Organisationen wurde ebenfalls hervorgehoben.

Während bei D&I zwischen den Unterzeichnern Fortschritte erzielt wurden, bleiben einige wichtige Hindernisse und Herausforderungen bestehen, darunter die Überwindung tief verwurzelter kultureller Vorurteile, der Widerstand gegen Veränderung/Mangel an Motivation innerhalb von Organisationen und die Messung des Fortschritts/der Auswirkungen der ergriffenen Maßnahmen. Begrenzte (menschliche und finanzielle) Ressourcen auf Organisations- und Charta-Ebene sind ein erhebliches Hindernis.

Auswirkungen auf Organisationsebene

Trotz der Herausforderungen wurden eine Reihe von Auswirkungen ermittelt, die sich aus Maßnahmen ergeben, die im Anschluss an die Unterstützung durch Chartas ergriffen wurden, darunter positive Auswirkungen auf die Organisationskultur, Reputationsvorteile, verbesserte Mitarbeiterbindung/-einstellung und Wohlbefinden sowie Innovation innerhalb von Organisationen.

Wichtigste Ergebnisse im Zusammenhang mit der EU-Plattform für Chartas der Vielfalt

Die 2010 eingerichtete EU-Plattform bietet eine Reihe von Unterstützungs- und Dienstleistungen, darunter:

- Instrumentarium für die Umsetzung der Charta (CIT)
- Diversity-Selbstbewertungsinstrument für Organisationen
- Newsletters
- Veranstaltung regelmäßiger Charta-Treffen (in der Regel vierteljährlich online und mindestens einmal pro Jahr persönlich in Brüssel)

Das CIT, das sich an Organisationen richtet, die Chartas durchführen, bietet Anleitungen zur Sensibilisierung, zur Anregung von Maßnahmen, zum Austausch von Ressourcen und bietet eine Reihe von Online-Tools und Checklisten. Die Mehrheit der Chartas, die auf die Umfrage antworteten, fand es entweder sehr nützlich oder einigermaßen nützlich für ihre Arbeit. Es wurden nur begrenzte Informationen über die Verwendung des Instruments zur Selbstbewertung der Vielfalt für Organisationen ermittelt.

Die Charta-Organisationen, die an der Umfrage teilnahmen, gaben insgesamt an, dass die Plattform nützliche Informationen liefert und dass die regelmäßigen Treffen von Vorteil sind, da sie die Möglichkeit bieten, Informationen auszutauschen und von den Erfahrungen anderer zu lernen sowie Zugang zu spezifischen Schulungs-/Lernmöglichkeiten zu erhalten. Einige waren der Meinung, dass die Plattform erweitert werden könnte, um von den Erfahrungen anderer Netzwerke auf EU-Ebene zu profitieren, einschließlich Industrie- und Wirtschaftsverbänden und sektoralen Organisationen, die bei ihren Mitgliedern auch für die Mitgliedschaft in Chartas werben könnten. Es wurde auch vorgeschlagen, dass das Netzwerk einen einheitlicheren Ansatz zwischen den Charta-Organisationen fördern könnte, insbesondere wenn es um diskriminierende Praktiken am Arbeitsplatz und Verstöße gegen das Arbeitsrecht geht.

Empfehlungen

Dieser Bericht enthält eine Reihe von **Empfehlungen für Organisationen/Unternehmen**, darunter:

Entwicklung von D&I Politiken

- Sicherstellung des Engagements der Führungskräfte und Abstimmung mit den Prioritäten der Mitarbeiter
- Entwicklung eines überzeugenden, maßgeschneiderten Business Case für D&I
- Umsetzung und aktives Management von D&I-Richtlinien
- Beginnen Sie einfach; verfeinern und verbessern Sie die Politik im Laufe der Zeit
- Sammlung von (anonymen) Daten zur Vielfalt, um Lücken zu erkennen und Ziele zu setzen

Business Case für D&I

- Passen Sie den Business Case an die Bedürfnisse und den Sektor Ihrer Organisation an
- Kombinieren Sie ethische Beweggründe mit ökonomischen Argumenten für D&I
- Erstellen Sie einen umfassenden, mehrdimensionalen Business Case
- Decken sie die folgenden acht Schlüsselbereiche ab: Rekrutierung und Bindung; Leistung; Innovation und Kreativität; Problemlösung und Entscheidungsfindung; Unternehmensreputation, Kundenzufriedenheit, Organisationskultur, Fairness, Gleichberechtigung und Wohlbefinden.
- Nutzen Sie Daten und Fallstudien, um D&I-Einflüsse zu präsentieren und andere zu inspirieren
- Nutzen Sie relevante EU-Richtlinien, um D&I in Ihrer Organisation zu verankern
- Erweitern Sie D&I über alle Geschäftsbereiche und Operationen
- Betonen Sie, dass subtile systemische Ausschlüsse nicht angegangen werden, wenn D&I keine Priorität eingeräumt wird

- Erkennen Sie an, dass die zunehmende Vielfalt der Belegschaft die Priorisierung der Inklusion für Talente erfordert

Inhalt der D&I Politiken

- Erfassen Sie sowohl Vielfalt als auch Inklusion, um den vollen Nutzen auszuschöpfen
- Alle Dimensionen der Vielfalt ansprechen, um einen engen Fokus zu vermeiden
- Verwendung von Vorbildern, Vorreitern und Fallstudien, um zu inspirieren
- Verbündete einbeziehen, um D&I-Bemühungen unternehmensweit zu stärken
- Beseitigung von Vorurteilen bei Einstellungs- und Beförderungsverfahren
- Messung und Benchmarking von D&I-Fortschritten zur Ermittlung von Verbesserungen
- Maßgeschneiderte D&I-Schulungen für Führungskräfte und weitere Mitarbeiter anbieten

Erfolgsfaktoren

- Anerkennen, dass die Schaffung einer D&I-Kultur nachhaltige Anstrengungen und ganzheitliche Ansätze erfordert
- Sicherstellung von Engagement und umfassenden Ressourcen, einschließlich finanzieller und personeller Mittel und Kommunikationsmittel
- Aufbau langfristiger Strukturen anstelle isolierter Maßnahmen für einen dauerhaften Wandel
- Kombinieren Sie Top-Down-Führung mit Bottom-Up-Engagement der Mitarbeiter
- Verankerung einer integrativen Kultur als Kernwert der Organisation

Externe Kommunikation

- Hervorhebung des Engagements für D&I in der externen Kommunikation und in Informationsmaterialien
- Taktvolle Anpassung der Botschaften an die verschiedenen Dimensionen der Vielfalt
- Abwägen zwischen geschäftlichen Argumenten und echtem Engagement für Gerechtigkeit

Der Bericht **enthält eine Reihe von Empfehlungen für Chartas**. Dazu gehören:

Reichweite/Erreichbarkeit/Zielgruppenorientierung

- sich für die freiwillige Offenlegung von Informationen über Vielfalt und Eingliederung durch Organisationen einsetzen und die Ergebnisse veröffentlichen, um ein Benchmarking zu ermöglichen
- Förderung der Arbeit der Charta und Ausweitung der Mitgliedschaft
- Zusammenarbeit mit und Lernen von anderen Chartas
- Führungsgruppen innerhalb von Organisationen ansprechen
- Austausch und Zusammenführung von Informationen
- Zusammenarbeit mit Verbänden und Vereinigungen, um sektorale Unterschiede besser zu verstehen und die Unterstützung zu erweitern und vertiefen

Bereitstellung von Instrumenten und Unterstützung

- Bieten Sie eine möglichst breite Palette von Dienstleistungen und Unterstützungsangeboten an, um der Tatsache Rechnung zu tragen, dass sich Organisationen in unterschiedlichen Phasen ihrer D&I-Reise befinden
- Entwicklung digitaler Tools für Arbeitgeber, z. B. KI-Tools für die Personalbeschaffung
- Anpassung der Dienstleistungen an die Bedürfnisse der Unterzeichner
- Unterstützung der Organisationen bei der Überwachung der Fortschritte bei der Umsetzung von D&I und der Verankerung in den unterzeichnenden Organisationen
- Angebot/Erweiterung von Vernetzungsmöglichkeiten und Austausch von Fallstudien
- Qualitativ hochwertige juristische Unterstützung anbieten (bei Bedarf)
- Verbesserung der Ressourcen für Chartas der Vielfalt

Zu **den Empfehlungen für die Europäische Kommission** gehören:

Regulatorische, rechtliche und politische Bestimmungen

- Stärkung der Umsetzung der bestehenden rechtlichen und politischen Rahmenbedingungen
- Bewertung rechtlicher Lücken und Berücksichtigung aller Dimensionen der Vielfalt
- Förderung der kommissionsübergreifenden Zusammenarbeit bei den rechtlichen Rahmenbedingungen für D&I
- Beibehaltung von D&I als Priorität auf der politischen Agenda
- Überwachung, Berichterstattung und Einhaltung der Chancengleichheit in Auftrag geben
- Bewertung der Auswirkungen von Digitalisierung und KI auf D&I-Initiativen

Stärkung der Wissensbasis

- Aufzeigen und Verbreiten von Belegen für den Nutzen von Vielfalt und sozialer Integration
- ethische/faire und wirtschaftliche Aspekte eines D&I-Business Case kommunizieren
- Entwicklung und Verbreitung umfassender D&I-Ressourcen und Schulungsmaterialien
- Erwägung der Entwicklung eines zentralen Portals für D&I-Ressourcen und -Tools
- Erwägung der Einführung eines Praxis-Checks und eines Prozesses für das Feedback der Verbraucher

Kapazitätsaufbau: Unterstützung, Tools und Fallstudien

- Anpassung von Instrumenten und Dienstleistungen an die Bedürfnisse und Kontexte der Stakeholder
- Förderung von Überwachungs-, Bewertungs- und Lerninstrumenten (MEL) zur Bewertung von D&I-Fortschritten

- Schaffung einer digitalen Plattform für die kontinuierliche Zusammenarbeit mit der Charta
- Sicherstellung angemessener Ressourcen für D&I, einschließlich finanzieller und personeller Unterstützung

Stärkung des Engagements der Stakeholder, der Öffentlichkeitsarbeit und der Verbreitung von Informationen

- Verbreiterung der Stakeholder-Basis der EU-Plattform für Chartas der Vielfalt durch den Aufbau von Partnerschaften und Allianzen
- Sensibilisierung für D&I-Nachweise und deren Bedeutung
- Zusammenarbeit durch Veranstaltungen, Vernetzung, Lernen und den Austausch von Fallstudien
- Förderung der Chartas und Unterstützung der Ausweitung ihrer Mitgliedschaft und Aktivitäten
- Einbindung der Mitgliedstaaten, um die D&I-Politik voranzutreiben und die gesetzlichen Mindestanforderungen zu übertreffen
- Verbesserung der Website und der Kommunikationsstrategie der EU-Plattform

Bereitstellung finanzieller Unterstützung

- Überprüfung bestehender Finanzierungsmodelle zur Unterstützung der nationalen Umsetzung von D&I
- Überarbeitung der Finanzierungsbedingungen zur Förderung der Zusammenarbeit und gemeinsamer Instrumente
- Evaluierung zusätzlicher Finanzierungsströme für zukünftige D&I-Initiativen

3. Introduction

This draft final report has been prepared by Risk & Policy Analysts (RPA), supported by expert advisors from the TIAS School for Business and Society (TIAS, part of Tilburg University; CSR Europe and the European Small Business Alliance (ESBA), for the Study on the “Business case of diversity and inclusion at work - impact of European Commission diversity and inclusion policies” JUST/2023/PR/CNDI/EQUA/0098 under Framework Contract JUST/2020/PR/03/0001 signed between Civic Consulting (on behalf of the Justice and Consumers Evaluation Consortium) and DG JUST.

The remainder of the report contains the following sections:

Section 4: Study objectives and methodological approach
Section 5: Findings related to the business case
Section 6: Findings related to impact of Diversity Charters and the EU Platform of Diversity Charters
Section 7: Conclusions and recommendations

And the following annexes:

Annex A: Full narratives of case studies
Annex B: Relevant regulatory and policy initiatives
Annex C: Interview information
Annex D: Supporting information and data from Section 5
Annex E: Classification of Member States by region
Annex F: References from Section 5
Annex G: Data and references from literature from Section 6
Annex H: References from literature from case studies

4. Study objectives and methodological approach

This section presents the study objectives, their operationalisation into research questions, and the methodological approach used for data collection and analysis.

4.1. Study objectives

This research study has two objectives:

1. To investigate **the benefits and potential business case** for private and public organisations **to pursue D&I**, and
2. To investigate **the impact of signing a Diversity Charter** in developing D&I policies in an organisation.

These overarching research objectives have been operationalised into four research questions to ensure a more systematic and comprehensive approach to examining the core topics of this study. The study provides evidence on the following four research questions:

1. What are **the economic and social costs and benefits of** D&I (and exclusion, if relevant) policies and practices?
2. What is **the impact of the EU Platform of Diversity Charters**?
3. What are **the benefits, challenges and impacts of signing a Diversity Charter**?
4. What are **the exemplary case studies** implemented by businesses and public organisations that actively promote D&I.

The thematic scope of this study encompasses a wide range of D&I policies, practices, initiatives, instruments and tools. The study covers public and private sector organisations, as well as NGOs, including both Charter signatories and non-signatories. Geographically, to explore the business case for D&I, the project examines international evidence, with a particular focus on studies discussing the situation across EU Member States. Primary data collection is focused on 27 EU Member States. The starting analytical point is 2010 when the EU Platform of Diversity Charters was established.

4.2. Methodological approach

The methodological approach of this study follows the requirements of the European Commission's Better Regulation guidelines and toolbox. As explained in Tool #4 Evidence-informed policymaking⁴, our approach to generating and leveraging evidence through data collection and analysis follows the six steps to a transparent use of evidence:

- **Understanding** to ensure a widely accepted and comprehensive approach: we clearly define the aims and objectives of each task and outline our work plan.
- **Mapping** by drawing on internal and external expertise: we mobilised a team of experts and plan to consult on our methodological and analytical approach with the client and wider experts in the critical stages of the project implementation.

⁴ European Commission, 2023.

- **Collection of evidence** by identifying, collecting and reviewing primary and secondary quantitative and qualitative sources.
- **Analysis** by critically assessing all collected evidence.
- **Interpretation** by integrating insights from all types of evidence and ensuring that findings support conclusions and recommendations.
- **Presentation** by reporting on all findings in a clear and tailored language and being transparent on the limitations of data and conclusions.

To establish a solid foundation for the study, during **the inception stage**, the study team conducted initial research and identified available data and key stakeholders. This process included informing and consulting key EU-level stakeholders during an initial workshop and a presentation to the Diversity Charters, requesting relevant literature and data from the European Commission, EU-level stakeholders and Diversity Charters, designing data collection tools (such as the online survey questionnaire, the interview questionnaires for different stakeholder groups), developing selection criteria for **case studies**, and refining the analytical approach.

The research process began with **a review of existing evidence**, including published reports, academic literature, quantitative data sources, and other documentation relevant to the thematic scope of this research project. In total, over 240 documents were collected, reviewed and processed. A standardised data collection template was used to review these sources against the research questions. The complete list of reviewed sources is provided in the References section and cited throughout this report. The review also included mapping of relevant regulatory and policy initiatives (see Annex B).

The **stakeholder activities** included an online survey, interviews at both EU and national levels, a workshop to select **case studies**, and a final seminar to discuss draft findings and recommendations.

The **online survey questionnaire** was designed to collect both quantitative and qualitative data. It was uploaded to EU Survey and disseminated through various channels, including CSR Europe, the European Commission, the Diversity Charters and civil society organisations. The survey was launched on 6 August 2024 and closed on 15 November 2024. In total, 130 responses were collected.

Targeted interviews were conducted to gather data and insights from relevant stakeholders on specific aspects related to the business case, Diversity Charters and **case studies**. In total, **64 interviews** were conducted across all research tasks. This included **10 interviews** with representatives of the Diversity Charters, **9 interviews** with stakeholders in Task 1, and **45 interviews** with representatives from private, public, and other organisations across the remaining tasks. While some organisations were interviewed more than once, the study involved **59 unique organisations** overall. A full table listing these interviews can be found in Annex C.

A workshop was organised to discuss and select identified case studies for in-depth examination. Workshop participants included representatives from the European Commission, organisations managing Diversity Charters, and study experts. In total, **20 case studies** were selected, and further three were placed on a reserve list. This list was later expanded during task implementation due to a lack of responses or refusals from some organisations and stakeholders selected for case studies. Overall, 20 case study narratives were developed based on a review of evidence and interviews. The full case study narratives are presented in Annex A, with key findings from all practices highlighted in text boxes throughout Section 5 and 6.

A final **seminar** was held towards the end of the project to discuss key findings, gather further insights into specific conclusions and to refine and prioritise recommendations. Seminar attendees included representatives from the Diversity Charters, EU-level civil society organisations, study experts and the European Commission.

All collected data was systematically examined against the research questions, with different sources of evidence triangulated wherever possible to capture, link and compare perspectives from various data sources and stakeholders. All analyses are presented in detail in the subsequent sections.

The study encountered several **limitations and challenges**, including:

- Limited quantitative evidence on the benefits and cost of the business case,
- A relatively low response rate to the online survey, and
- Refusals and lack of engagement from some stakeholders representing case study examples.

These challenges were mitigated by extrapolating and triangulating data from existing relevant quantitative sources, extending the survey closure deadline, and reaching out to a broader range of potential case study examples.

5. Findings related to the business case

5.1. Introduction

This section of the report sets out the key findings relating to the business case for D&I in the workplace formulated on the basis of a literature review and stakeholder consultation (survey and interviews).

The business case focuses on providing evidence to answer the following key questions:

- Why should companies/organisations foster D&I?
- Why should policy makers support the implementation of D&I policies?

The target audience groups for the business case described in this report includes:

- Companies/organisations; and
- Policy makers
- The reason for explicitly defining the two key audiences is to ensure that the report provides a business case tailored to both.

5.2. Overview of the main types of benefits

For the purposes of this report, the term business case is defined as a broad concept that encompasses a range of business/economic, societal, well-being, and fairness-related impacts, which have been assessed in the literature using a range of quantitative and qualitative methods. This is to ensure that a comprehensive case is presented that does not omit any significant positive impacts, even when they are difficult to quantify. It is also in line with the approaches in some of the reviewed literature which treats the business case for D&I as multi-dimensional. For example, Formanek (2021)⁵ frames the case for D&I in the workplace in terms of four distinct but complementary dimensions:

- Legal case - ensuring compliance
- Business case – improving performance
- Ethical case – satisfying moral imperatives
- Societal case – supporting societal well-being

Other authors rely on alternative definitions but, clearly, a business case that does justice to the breadth of the positive impacts from D&I needs to be multi-dimensional and needs to consider a range of economic and societal impact categories. It is also advisable to build a case that builds on ethical and fairness arguments and does not consider the benefits of D&I in purely utilitarian/economic terms. This study therefore takes a broad approach that

⁵ Formanek, 2021.

encompasses a range of impacts broadly grouped under the performance, talent and wider societal/fairness cases.

A general overview of the types of benefits of D&I for companies/organisations and policy makers is set out below (see [Box 1](#)). We distinguish here between advantages of D&I, and policies regarding D&I. The reason for this is that the benefits of D&I do not materialise automatically, but need to be managed (Leslie et al., 2024⁶). D&I policies are essential for the management of D&I (Zhou et al., 2024⁷).

Box 1 Examples of benefits of D&I

Question	Examples of positive impacts
<p>Why should companies/organisations foster D&I?</p>	<p>Enhanced Decision-Making: Diverse perspectives lead to more thorough and innovative problem-solving.</p> <p>Increased Creativity: A range of viewpoints fosters creativity and drives innovation.</p> <p>More Legitimacy: Representing the diversity of society and their potential customers enhances an organisation’s legitimacy</p> <p>Better Market Reach: Understanding diverse customer needs helps tailor products and services more effectively.</p> <p>Improved Employee Satisfaction: Inclusive environments boost morale and job satisfaction, leading to higher retention.</p> <p>Stronger Financial Performance: Companies with diverse teams often experience better financial outcomes and competitive advantage.</p> <p>Better Talent Pipeline: More and better talent is available when companies are open to people of all sorts of backgrounds.</p> <p>More Equal Society: Societal inequalities will be reduced when companies offer equal opportunities to everyone regardless of their backgrounds.</p>
<p>Why should policy makers support the implementation of D&I policies?</p>	<p>Materialising the Business Case: To materialise the above-mentioned benefits of D&I, it needs to be managed. Policies are vital for that.</p> <p>Promote Equity and Fairness: Ensures all individuals have equal opportunities and are treated fairly.</p> <p>Reduced Risk of Bias: Inclusive policies help minimise biases and groupthink in decision-making.</p> <p>Economic Growth: Diverse and inclusive workplaces contribute to economic growth and competitiveness.</p> <p>Social Cohesion: Encourages integration and mutual respect among different social groups.</p> <p>Enhanced Innovation: Diverse perspectives lead to more innovative solutions to societal and economic challenges.</p>

⁶ Leslie et al., 2024.

⁷ Zhou et al., 2024.

Question	Examples of positive impacts
	Global Competitiveness: Helps nations remain competitive in a globalised economy by leveraging diverse talents and ideas.

The study considers the potential for positive impacts from D&I policies in both private companies and public sector organisations. The benefits described are potential benefits identified in the literature regardless of the institutional setting in which they have occurred. The report does not examine the degree to which D&I policies described in the literature were effective or whether diversity policies in the literature were implemented together with inclusion measures. The business case presented in this report amounts to ‘potential’ benefits and it is recognised that, for these benefits to materialise, necessary framework conditions may need to be put in place. For example, it is possible that without adequate investment in D&I measures, these benefits may not materialise in individual companies. Similarly, inclusion is known to be crucial for leveraging the performance benefits of diversity. If people with different backgrounds are not valued for who they are, they are likely to leave the company soon again.⁸ There are various reasons why diversity does not automatically translate into better performance. For example, people with different backgrounds tend to be more excluded, their input tend to be taken less seriously, etc. The performance case thus does not materialise automatically and needs investment into some D&I policies and practices.⁹

For the benefits described in this report to materialise, companies and public sector organisations need to have D&I policies and practices in place that are effective.¹⁰ In practice, this is not always the case with many D&I policies and practices being ineffective or even having negative effects.¹¹ The reasons and causes for when and why D&I policies result in negative consequences can be found, for example, in Leslie (2019).¹² Leslie (2019) classifies the negative consequences of initiatives as (a) backfiring (negative progress on diversity goals), (b) negative spillover (negative effects on outcomes other than diversity) and (c) false progress (improvement in diversity metrics but no real progress). In addition, the effectiveness of policies is not just in the design of the policies but also in how they are implemented.¹³ As Dobbin & Kalev (2016)¹⁴ point out, top management support is crucial for diversity initiatives to succeed.

As noted above, the business case for D&I is multi-dimensional. Our approach is based on a framework comprising four main business cases: a) performance case, b) the talent case for the companies/organisations themselves, c) representation case and c) a wider Corporate Social Responsibility (CSR) case. Together, these cases make a compelling argument for why D&I should be a priority for all companies/organisations as well as policy makers.¹⁵

⁸ Shore et al., 2011; Puritty et al., 2017; Nishii, 2013.

⁹ Leslie et al., 2024.

¹⁰ Comprehensive reviews of D&I policies and practices effectiveness are: Korkmaz et al., 2022; Maude et al., 2021; Shore et al., 2018; Kersten et al., 2023; Bezrukova et al., 2016; Nishii et al., 2018.

¹¹ Dobbin & Kalev, 2016.

¹² Leslie, 2019.

¹³ Shore et al., 2018.

¹⁴ Dobbin & Kalev, 2016.

¹⁵ The fourth case as proposed by Formanek (2021), the legal/compliance case, is seen as being outside the scope of this study.

The four cases are:

- **The performance case** emphasises the tangible benefits of better decision-making, innovation, and public trust, for example: better performance due to better decision-making, better performance due to a better connection with a diverse set of customers/clients, better performance because of a lack of negative publicity.
- **The talent case** highlights the importance of D&I in attracting and retaining top talent in a diverse labour market. Being open to employees with diverse backgrounds enhances chances of hiring top-talent, and adopting fair selection and promotion policies and practices helps to retain and foster top-talent, regardless of their backgrounds.
- **The representation case** focuses on acquiring legitimacy, as well as understanding potential clients and reaching new customers.
- **The CSR case** underlines the companies'/organisations' role in promoting social justice and equity, both within its workforce and in the broader society, whilst also recognising the benefits for companies' reputation and internal efficiency, as well as the benefits accrued by society at large.

The four cases set out above are complementary but also interlinked and partly overlapping. For example, better CSR performance improves a company's reputation which in turn can improve financial performance. Similarly, unbiased talent acquisition and development makes it more likely that the organisation also performs well.¹⁶

For this reason, the approach set out above has been operationalised by focusing on eight specific policy aspects that collectively cover the three main business cases:

- Section 5.4.1 Staff recruitment and retention
- Section 5.4.2 Performance (e.g. productivity, financial performance, other KPIs)
- Section 5.4.3 Innovation and creativity
- Section 5.4.4 Problem solving and decision making
- Section 5.4.5 Reputation of the organisation
- Section 5.3.6 Customer satisfaction
- Section 5.3.7 Organisational culture and team interaction
- Section 5.3.8 Fairness, equality, and well-being

5.3. Summary of existing evidence

The objective of this section is to summarise the evidence for each of the aspects of the business case set out above. The review in this section of the report can also serve as an indication of under-researched areas, thus highlighting where further research would be beneficial to strengthen the evidence base for a comprehensive business case. The

¹⁶ Van Dijk et al., 2017.

evidence includes literature (academic and grey literature, websites), the results of the survey and stakeholder interviews.

5.3.1. Literature review

The literature review is mainly based on relevant scientific literature. To arrive at more specific insights and predictions relevant to the European Commission, we combined the insights from the scientific literature with global, European, and national reports, news articles, and reports from practice such as from global consultancy firms.

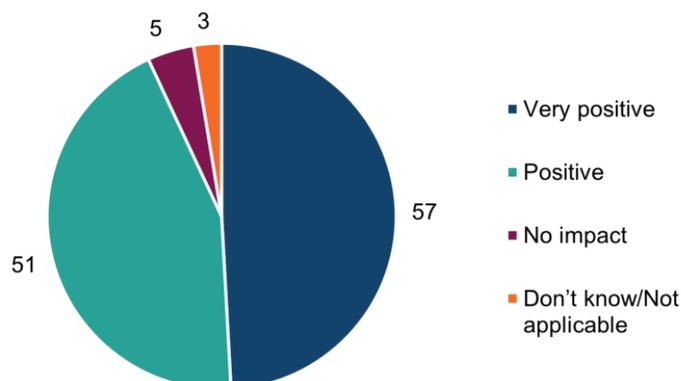
A large number of potentially relevant sources of evidence (around 100) have been identified by the study team and much of the available literature has been reviewed. As an example of the literature review carried out to date, an overview of the identified literature for staff recruitment and retention is provided in Annex D.

Overall, there is a significant body of research that sets out, in different ways, a business case for D&I policies. However, there are also large differences between the evidence available for the different diversity dimensions: sex, racial or ethnic origin, nationality/citizenship, LGBTIQ, disability, neurodiversity, age, religion or belief, socioeconomic status, education/qualification level, political opinion, family composition/parental responsibilities (e.g. single parents, work-life balance) and work experience. This shows that, whilst a large body of literature on the effects of D&I in the workplace exists, there are aspects that are less researched. An overview of the identified literature for each of the eight aspects of the business case is provided in Annex D.

5.3.2. Survey results

In the survey carried out for this study, the vast majority of the respondents identified positive or very positive impacts (either experienced or potential) from D&I for their organisation (see Figure 1 below).

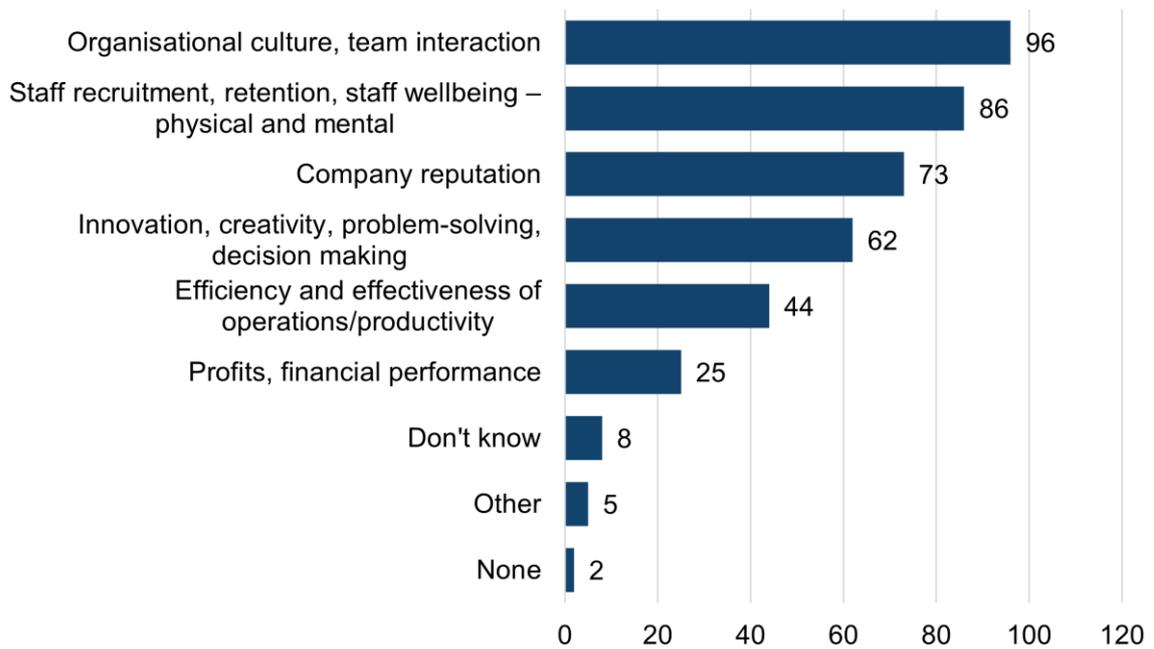
Figure 1. Impact of D&I on the respondents' organisations



Source: D&I survey. N=116. Single answer question. Survey options: very positive, positive, no impact, negative, very negative, don't know/not applicable.

The specific areas in which positive impacts have been experienced by respondents to the survey include culture & interaction, recruitment and retention, and others (see Figure 2 below).

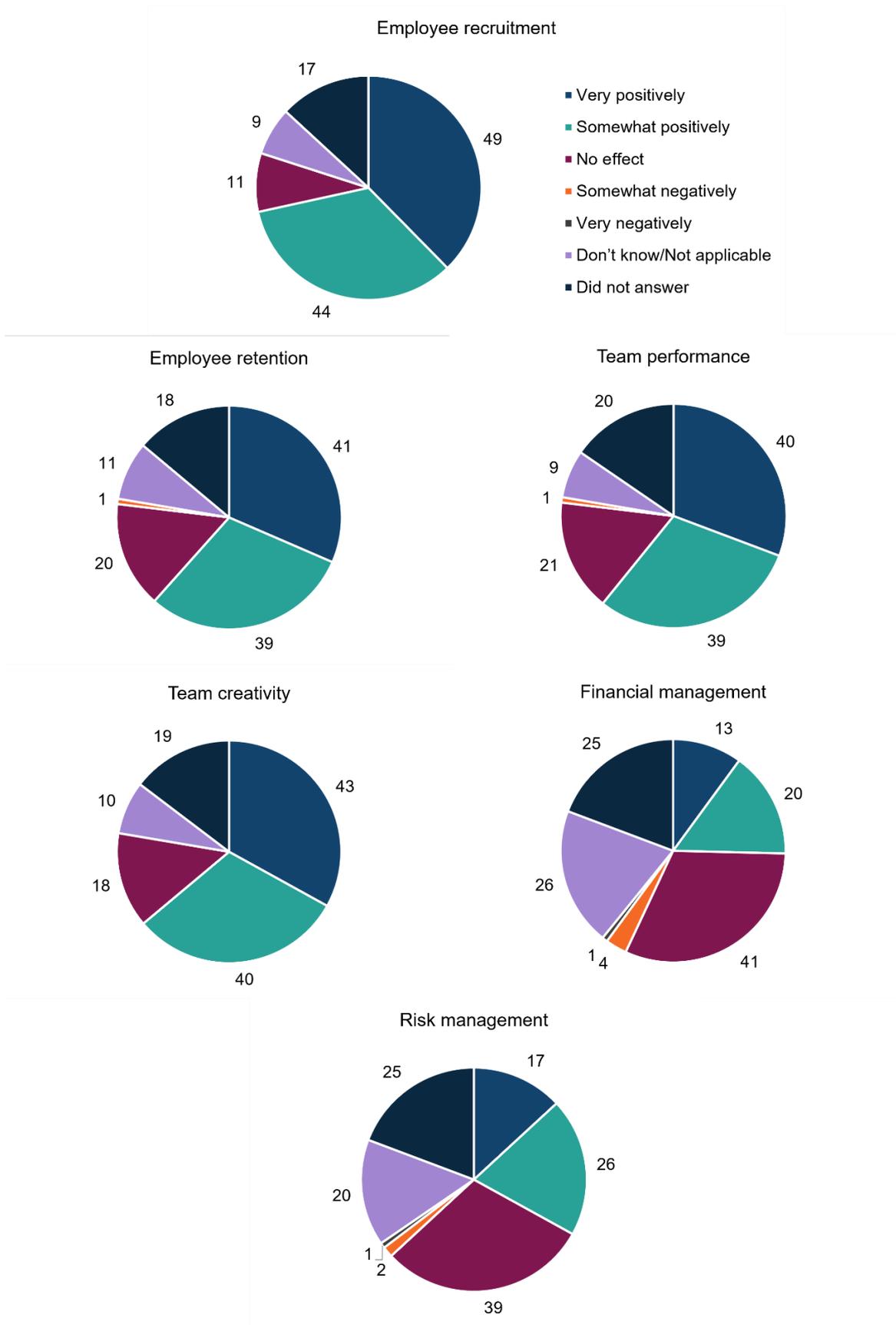
Figure 2. Positive impact of D&I on the respondents' organisations



Source: D&I survey. N=116. Multiple answer question.

The majority of the respondents to the survey agreed that D&I policies/practices had more positive than detrimental effects on their organisation for the relevant aspects such as staff recruitment and retention and organisational performance.

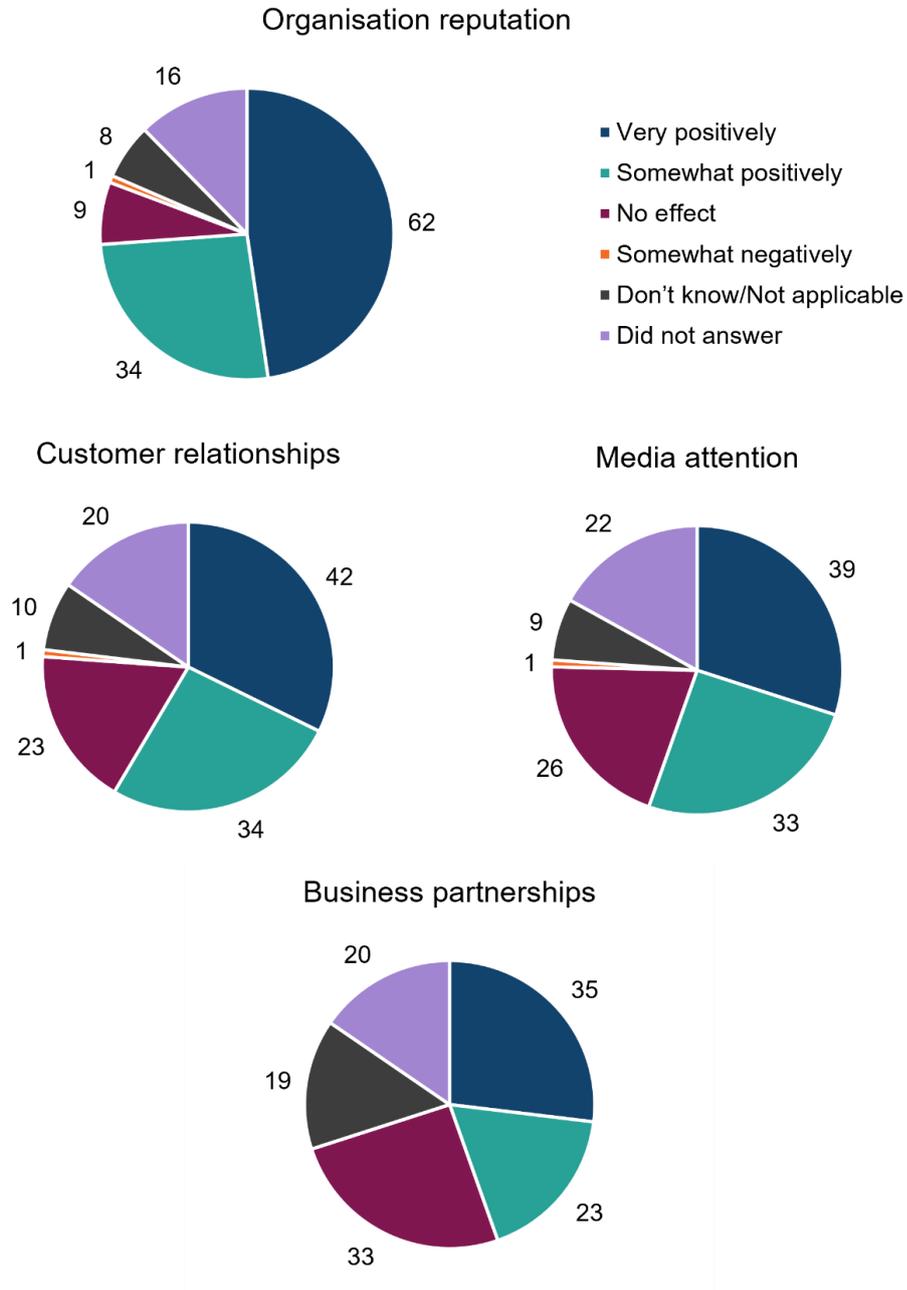
Figure 3. Positive vs. detrimental effects of D&I on the respondents' organisations



Source: D&I survey. N=130. Single answer questions.

The vast majority of the survey respondents also identified benefits from D&I policies in terms of a positive relationship between their organisation and the wider community (see Figure 4).

Figure Error! No text of specified style in document.4. The effect of D&I policies/practices on the relationship with the wider community



Source: D&I survey. N=130. Single answer questions.

5.3.3. Interviews

Nine interviews have been conducted specifically for the analysis of the business case (see Annex C for a full list of interviewed experts). These included an author of a book on D&I, a trade union representative, a holding company that manages a network of hospitals, a public body responsible for D&I in a third country, an umbrella organisation in an EU-

Member State (but not a National Diversity Charter) for companies implementing policies for LGBTIQ employees, two academics and an advocate of LGBTIQ rights in the workplace.

Staff recruitment and retention was noted in the interviews to be a key benefit of improved D&I in the workplace. For example, an interviewee noted that when a business case is made to companies, easier recruitment is a key benefit category that companies are receptive to. Similarly, another interviewee noted the potential negative consequences of not achieving minimum staffing levels in the healthcare sector; the benefits for recruitment from D&I policies thus have a potential to mitigate such negative impacts.

5.4. Business case by benefit type

5.4.1. Recruitment and staff retention

People belonging to the underrepresented groups examined in this report tend to be disadvantaged in a number of ways, starting already in the job application process¹⁷ (i.e. less chance of being invited to a job interview and/or being offered the job) and once in employment, in the salary they receive, in the chances for promotion, in the chances to become a leader, and in the chances to be accepted as a leader.¹⁸ All these effects are due to biases and prejudices, resulting in inequality and unfairness. Policies and practices are needed to overcome/compensate for all those biases to make sure that there is a level playing field for everyone and that the organisation can attract and retain the best talent.

Being able to foster an organisation where people are treated equally and fairly will make the organisation more attractive for job seekers and makes it more likely that employees will want to continue working there.

This is a part of the talent case which builds on the insights that societies are becoming more diverse, and with that job seekers. Being open to employees with diverse backgrounds enhances chances of hiring and retaining top-talent. Box 2 offers an example of a practice promoting inclusive workplaces.

Box 2 – Business in the Community Ireland’s *Elevate Pledge* as a case study example

The Elevate Pledge committed 60 companies representing over 150.000 employees across 18 different industry sectors, to build more inclusive workplaces reflective of Irish society. Signatories were asked to record the diversity profile of their workforce and develop tangible actions ensuring the recruitment, retention and progression of diverse talent. These efforts, based on data-driven interventions and mutual learning, increased diversity insights, reduced representation gaps, and improved social inclusion within the working environment.

5.4.1.1. Recruitment benefits

A number of papers identified through the literature review (12) examine the benefits of diversity policies by assessing the response of job applicants to specific diversity-oriented actions. The studies analyse the job seekers’ perceptions of company diversity policies or

¹⁷ Andriessen et al., 2024.

¹⁸ Van Dijk et al., 2020.

diversity management practices and how such perceptions influenced job-related decisions. The studies used various research methods such as surveys, interviews or a combination of both. One study conducted a systematic literature review (Alahakoon et al, 2024).¹⁹ Six studies are national, while four have an international scope, and two focus on sector-specific recruitment (e.g., tourism and hospitality). For instance, Klysing et. al. (2022)²⁰ spans multiple sectors in Sweden and the U.S., examining how gender-diverse job advertisements affected applicant perceptions. Similarly, Dauth et. al. (2023)²¹ explored how diversity within the top management team influences recruitment outcomes in multinational corporations across four European countries.

The most cited benefits of diversity policies in recruitment are enhanced organisational attractiveness, increased job pursuit intentions, and a broadened applicant pool.

According to several studies, the diversity statements in job advertisements increase the attractiveness of a recruiter and positively influence a job pursuit intention. Mor et al. (2024)²² conclude that LGBTIQ employees find organisations that consciously support LGBTIQ identities, more attractive than identity-blind workplaces. The authors explain that conscious support for LGBTIQ identities allows employees to feel authentic and safe and, therefore, recommend communicating the identity-conscious approach in the job advertisements. Similarly, Lambert (2015) concludes that diversity support in organisations influences the job pursuit intentions among LGBTIQ applicants and advises recruiters to include diversity statements in job advertisements. Furthermore, Miller & Parker (undated)²³ note that signalling openness to LGBTIQ candidates attracts non-LGBTIQ talent as well. Following the analysis of 39 studies, Alahakoon et al. (2024) also concluded that the diversity statements in job advertisements may positively affect the intention to apply. However, the authors warn that the effect of diversity statements may vary across different groups. Previous research shows that job-pursuit intentions increase among females and individuals with diverse ethnic backgrounds and strong ethnic identities. Differently, diversity statements might increase the feeling of exclusion in other groups. Moreover, in the study of neurodivergent individuals' perceptions of diversity statements in job advertisements, Poag et al (2024)²⁴ find that job seekers who are proud of their identity perceive organisations with diversity statements positively, but the authors warn that the effect may not be the same for those who are not positive about their neurodivergent identity.

Some studies that focus on organisational activities find a **link between employer attractiveness and diversity practices**. For instance, McKinsey (2023)²⁵ analyse the environmental, social, and governance (ESG) metrics of 1,250 companies and conclude that there is a link between sex and ethnic diversity in the executive teams and boards and workforce score (namely, talent attraction and retention). Dauth et al. (2023) find that the nationality diversity of top management teams in various European companies is positively linked to the attractiveness of these employers to foreign job seekers. Madera et al. (2018)²⁶ conclude that information about a company's investment in diversity management programmes increases its attractiveness as an employer. Similarly, in a study by Ng & Burke (2005)²⁷, diversity management practices are an important condition for choosing between

¹⁹ Alahakoon, et al., 2024.

²⁰ Klysing et al., 2022.

²¹ Dauth et al., 2023.

²² Mor et al., 2024.

²³ Miller & Parker, no date.

²⁴ Poag & Boncoeur, 2024.

²⁵ McKinsey & Company, 2023.

²⁶ Madera et al., 2018.

²⁷ Ng & Burke, 2005.

recruitment offers. Interestingly, Avery et al. (2013)²⁸ find that the perceived organisational value of diversity is important for those study participants who strongly value diversity themselves.

In addition, a study by Glassdoor (2020)²⁹ reveals that 76% of job seekers and employees report that a company's reputation of having a diverse workforce is an important factor when evaluating companies and job offers. This indicates that potential employees value diversity highly and are more likely to consider employment with companies that demonstrate a commitment to D&I.

Interestingly, the studies show that recruiters are well aware of a link between employer attractiveness and diversity policies. The U.S. survey of companies shows that 79% of the respondents initiated diversity programmes to attract job candidates. In total, 59% of respondents stated that their efforts resulted in a better job applicant pool (U.S. Chamber of Commerce Foundation, 2019).³⁰ In a large-scale European survey of small and medium-sized companies (SMEs), 60% of the respondents suggested that diversity policies allow the recruitment and retention of high-quality employees (European Commission, 2008).³¹

The reviewed studies contain some limitations. Most of them focused on perceptions of diversity policies or practices developed by jobseekers (or potential jobseekers who participated in the study) based on diversity statements or information about a recruiting organisation. Such research does not cover other elements of the recruitment process, such as job interviews and evaluations. It is also important to note that the organisation's communication about its diversity initiatives may have a diverging effect on different groups of stakeholders. In addition, it is important to note that some studies have found a result that does not support the benefits as set out in this section. Several studies found negative consequences of diversity statements for the sense of belonging (and interest in joining an organisation) amongst several groups of underrepresented workers (Georgeac & Rattan, 2022 & 2023).³²

Whilst most of the research identified for this study focuses on private sector organisations, a similar case can be made for the public sector. As the global workforce becomes increasingly diverse, public-sector organisations that prioritise D&I are better positioned to attract and retain top talent. A diverse workforce is more appealing to job seekers who are looking for inclusive environments where they can thrive. According to a report by the Center for American Progress, 47% of millennials (people aged 29 to 40 in 2021) consider D&I to be an important criterion when evaluating potential employers.³³ By fostering an inclusive environment, public sector organisations can tap into a broader talent pool, increasing their chances of hiring highly skilled individuals from various backgrounds. Public sector organisations that are seen as leaders in D&I are more likely to attract talent from underrepresented groups, which can provide a competitive advantage in the increasingly diverse labour market. For example, in technology and innovation-driven sectors, where talent shortages are common, organisations that are open to diverse hires are more likely to fill critical roles quickly and effectively.³⁴ In the public sector, this is particularly important for roles that require specialised skills or knowledge.

²⁸ Avery et al., 2013.

²⁹ Glassdoor, 2020.

³⁰ U.S. Chamber of Commerce Foundation, 2019.

³¹ European Commission, Directorate-General for Employment, Social Affairs and Inclusion, 2008.

³² Georgeac & Rattan (2022) and Georgeac & Rattan (2023).

³³ Deloitte, 2021.

³⁴ Ibid.

Box 3 presents an example from Luxembourg focusing on an inclusive communication practice.

Box 3 – IMS Luxembourg’s *Inclusive Communication* initiative as a case study example

The Inclusive Communication practice at IMS Luxembourg has achieved progress in embedding inclusivity and accessibility across its internal and external communication processes. Introduced as part of the 2023–2024 Diversity Plan, the practice focuses on standardising inclusive language, improving accessibility, and fostering cultural shifts within the organisation. Key accomplishments include the development of an editorial guide, the adoption of accessible formats, and integrating inclusivity into recruitment, event planning, and public-facing materials. Despite challenges such as limited financial resources, IMS successfully implemented the practice by leveraging internal expertise and aligning it with the organisation’s broader strategy. This initiative demonstrates IMS’s commitment to creating a more inclusive organisational culture while providing a scalable model for other organisations.

5.4.1.2. Retention benefits

Twenty studies identified in the literature review focus on retention, examining how HR diversity practices, organisational diversity approaches, and companies’ strategies can impact employees’ intentions as regards staying with an organisation and how employees’ perceptions of organisational diversity affect their decisions. Most papers use surveys and interviews as a primary method to gather data from employees. One study relies on a systematic literature review (Lindsay et al., 2018).³⁵ Out of the 20 retention studies, 14 papers have a national scope and 6 are international. 5 papers focus on specific sectors such as hospitality, retail, IT, and engineering.

The most cited benefits of diversity policies in retention are **reduced turnover intentions, increased commitment to the organisation, and higher job satisfaction.**

According to several studies, **a positive diversity environment plays a significant role in shaping employee turnover intentions.** Boehm et al. (2013)³⁶ and Bellotti et al. (2022), highlight how practices like equal access to training and development opportunities for different age groups foster a positive workplace climate, which is crucial for reducing turnover across all age groups. A similar impact is observed in the retention of LGBTIQ employees. Mor et al. (2024) and the U.S. Chamber of Commerce Foundation (2019) suggest that diversity policies, such as anti-discrimination measures and equal benefit coverage, promote a sense of belonging and justice, which in turn reduces turnover. Sex diversity interventions, particularly in male-dominated industries like IT and engineering, are found to improve women's retention through initiatives like mentoring, leadership development programmes and flexible work arrangements (Annabi & Lebovitz, 2018³⁷; Lacerenza et al. (2024)³⁸; and Hanappi-Egger, 2012).³⁹ An example of a retention sponsorship practice is presented in Box 4 (see also Annex A).

³⁵ Lindsay et al., 2018.

³⁶ Boehm et al., 2013.

³⁷ Annabi & Lebovitz, 2018.

³⁸ Christina et al., 2024.

³⁹ Hanappi-Egger, 2012.

Box 4 – A sponsorship scheme can aid retention as a case study example

The sponsorship programme, implemented by Toyota Motor Europe (TME), aims to support key female talent to unleash their full career potential and simultaneously develop executive leaders to become more inclusive leaders and better allies. The selected women, 'sponsees' are partnered with an executive 'sponsor' from a different business area for the duration of the one year programme. Training is given to both the sponsee and sponsor in the form of assessments, skill building sessions and coaching. The content is designed to support the women to overcome the common barriers that they can face when seeking career advancement. The sponsors key purpose is to champion the women by connecting them to their networks, supporting their visibility across the business and advocating for them especially when they are not in the room. The programme is delivered with the support of an external organisation. From the first three cohorts, 100% of women who participated either advanced laterally by rotating to another area of the business or vertically through promotion. In addition, through the participation of and investment in the sponsors, the programme has also fostered inclusive leadership across TME.

According to Park & Martinez (2022)⁴⁰, inclusive policies addressing religious diversity result in greater employee satisfaction and lower turnover . Gewurtz et al. (2022)⁴¹ find that organisational strategies like relationship-building practices, such as emotional support, open communication and flexible work practices, enhance the retention of employees suffering from poor mental health.

Some studies focus on the **employees' perception of organisational diversity, concluding that it strongly influences their commitment and intention to stay with or leave a company**. According to Kunze et al. (2010),⁴² perceptions of an age-discriminatory environment negatively affect employees' emotional attachment to their organisation, leading to higher staff turnover. In the case of LGBTIQ employees, Deloitte (2023)⁴³ shows that when LGBTIQ employees perceive a lack of LGBTIQ inclusion, many are inclined to seek opportunities with organisations that provide better support. This pattern is echoed in studies on racial and ethnic diversity, where a perceived pro-diversity environment is associated with lower resignation intentions (McKay et al., 2007).⁴⁴ Perceptions of fair and just diversity management practices, such as equitable pay and promotion opportunities, are also associated with reduced turnover across different employees of diverse racial origin and age (Chordiya, 2022⁴⁵ and Kunze et al., 2010), while perceived religious discrimination can harm employees' engagement and commitment, as shown in Messarra (2014).⁴⁶

On the other hand, in research focussing on Dutch public sector employees, Groeneveld (2011)⁴⁷ underlines that diversity management programmes can cause dissatisfaction among majority groups. Similarly, Hsiao et al. (2015)⁴⁸ suggest that perceived organisational diversity can have contrasting effects across minority and majority groups. In this regard, it is important to note that such effects can be managed by an appropriate

⁴⁰ Park & Martinez, 2022.

⁴¹ Gewurtz, 2022.

⁴² Kunze et al., 2010.

⁴³ Deloitte, 2023.

⁴⁴ McKay et al., 2007.

⁴⁵ Chordiya, 2022.

⁴⁶ Canaan & Messarra, 2014.

⁴⁷ Groeneveld, 2011.

⁴⁸ Hsiao et al., 2015.

design of D&I policies. For example, Chapman et al. (2023) examine how participation in diversity charters can mitigate the negative effects of workforce diversity.

5.4.2. Performance

The performance case comprises a variety of arguments, some of which are linked to the other policy aspects considered in this study, such as problem solving and creativity, customer satisfaction, reputational gains, etc., all of which are likely to support performance gains. The term performance relates to both financial performance and output improvements measured by other indicators, such as non-financial performance indicators in the public sector.

There are numerous reports and studies that have established a **positive relationship between D&I in the workplace and increased financial performance** (McKinsey and Company, 2015).⁴⁹ Some studies argue that improvements in CSR lead to enhanced brand image and reputation which, in turn leads to increased sales and customer loyalty (Mishra and Suar, 2010).⁵⁰ In fact, the majority of companies that embark on D&I do so as part of their organisational CSR strategy, rather than as a separate activity (Maj, 2017).⁵¹ Firms that prioritise sustainability, including social sustainability (diversity, inclusion and social policies) tend to perform better financially in the long run (Christensen, Hail, & Leuz, 2021).⁵² Similarly, evidence from the Czech automotive sector suggests that D&I in the workplace improves profits and other KPIs: “by valuing and leveraging the diversity of its workforce, a company can improve its decision making, creativity, and innovation, which can lead to improved performance and competitiveness (Velinov and Štrach, 2021).⁵³

Having a diverse workforce enables companies to better understand and penetrate diverse markets. Companies in the top quartile for ethnic and cultural diversity on executive teams were 33% more likely to have industry-leading profitability (McKinsey & Company, 2020).⁵⁴ The explanation for these findings is that diverse teams can connect with a broader customer base, and companies that can reach and effectively engage with diverse markets benefit from increased sales and revenues. Box 5 presents an example of a practice addressing ethnic representation in the workforce in Belgium.

Box 5 – Addressing ethnic representation in the workforce in Belgium

The Prince Philippe Fund established in 1998 as part of the King Baudouin Foundation, has long been a champion of fostering dialogue among Belgium’s diverse ethnic communities. In 2021, the Fund, in collaboration with the Business Uniting Talent 2030 Project, took steps toward trying to address ethnic minority under-representation in the Belgium workforce. The aim of the partnership was to develop a more forward-thinking and scalable approach to tackling socio-demographic shifts and labour market challenges with innovative solutions to embed D&I into the operational fabric of Belgian businesses.

⁴⁹ McKinsey & Company, 2015.

⁵⁰ Mishra & Damodar, 2010.

⁵¹ Maj, 2017.

⁵² Christensen et al., 2021.

⁵³ Velinov & Štrach, 2021.

⁵⁴ McKinsey & Company, 2020.

Additionally, a review of studies on factors moderating the effects of workplace diversity, (Guillaume et al., 2017)⁵⁵ concludes that diversity enhances performance in companies oriented towards growth or innovation. Overall, diversity contributes to improved innovation and companies with above-average diversity scores report an average innovation revenue of 45% compared to 26% reported by companies with below-average diversity scores (BCG diversity and innovation survey, 2017).⁵⁶

In addition, diverse and inclusive teams are considered better at problem solving. Diversity can contribute significantly to organisational efficiency by enhancing team performance, including problem-solving (Østergaard et al., 2011)⁵⁷ as well as by increasing innovation and operational effectiveness. This is because diverse teams are composed of individuals with varying backgrounds, experiences, and perspectives, which can lead to more innovative ideas and solutions, which, in turn can improve efficiency and allow for problems to be tackled more effectively. For example, companies with diverse management teams reported 19% higher innovation revenues, which suggests improved operational efficiency⁵⁸. A report by Cloverpop (2017)⁵⁹ found that diverse teams make better business decisions up to 87% of the time due to having multiple perspectives, which improves analytical skills and supports finding the most viable solutions.

Sodexo, who were named the best diversity employer for 2020 by Forbes and received a perfect score in the Disability Equality Index 2022⁶⁰ point out that they have significantly benefited from their commitments to D&I. According to them, teams that are gender-balanced are 13% more likely to have higher engagement and 23% more likely to show increased efficiency in their operations (Sodexo, 2018).⁶¹ Similarly, P&G claim that their diversity efforts contributed to a 20% increase in operational efficiency over five years (P&G, 2020).⁶²

Studies agree that a diverse and inclusive environment increases good team performance in the public sector. An analysis of municipalities in Slovakia demonstrates that introducing diversity efforts helped employees to meet their innovation and development goals (Jankelova et al., 2021).⁶³ Moreover, the same study examines how employee diversity (in terms of education, gender, and ethnic origin) impacts innovation outcomes and found that diversity significantly enhances innovative performance, which is a key aspect of team efficiency.⁶⁴

The public sector, as the arm of government closest to the citizens, plays a pivotal role in delivering services that affect every aspect of society. Therefore, it must be reflective of the diverse populations it serves. Embracing D&I within public institutions not only upholds democratic principles but also contributes to more innovation. D&I in public sector organisations are not just moral imperatives but are also vital for enhancing organisational performance, attracting and retaining talent, and fulfilling broader CSR objectives.

⁵⁵ Guillaume et al., 2017.

⁵⁶ Boston Consulting Group, 2017.

⁵⁷ Østergaard et al., 2011.

⁵⁸ Boston Consulting Group, 2018.

⁵⁹ Cloverpop, 2017.

⁶⁰ See: Sodexo, 2022.

⁶¹ See Sodexo, 2018.

⁶² Procter & Gamble, 2020.

⁶³ Jankelová et al., 2021.

⁶⁴ Ibid.

5.4.3. Innovation and creativity

Diverse teams are conducive to innovation and creativity.⁶⁵

Cognitive diversity is the term used to describe the range of perspectives, skills, knowledge, and experience that people bring to an organisation or team. Cognitive diversity is essential to innovation.

Cognitive diversity reduces unconscious bias by introducing different perspectives and thought processes into the workplace. This can broaden the scope of critical thinking, decision making, and provide new and creative ways of looking at operational problems. Additionally, cognitive diversity reduces “groupthink” when group decisions are driven by shared opinions and social pressures rather than facts. Innovation can be stifled when there is neither diversity nor accounting for unconscious bias (Cheung et al., 2016⁶⁶; Hoever et al., 2012⁶⁷; Hülshager et al., 2009⁶⁸; Leroy et al., 2022⁶⁹; van Dijk et al., 2012⁷⁰; van Knippenberg et al., 2024⁷¹).

Research shows that teams that benefit the most from diversity typically:

- Emphasise the importance of diverse perspectives for tasks,
- Lead teams in gathering, considering, and combining diverse ideas,
- Review their decision-making processes to understand how integrating diverse ideas helped solve problems,
- Act as role models by actively seeking and valuing others' ideas.

For public sector organisations, Houdek (2022)⁷² concludes that studies from the private sector suggest that public sector may also benefit from recruiting neurologically atypical individuals, resulting in increases in innovation and output quality.

5.4.4. Problem solving and decision making

By fostering an inclusive environment where all individuals feel respected, valued, and able to contribute their unique perspectives, organisations can **enhance their decision-making processes. The inclusion of diverse voices ensures a richer pool of ideas and solutions, leading to more innovative and effective outcomes** (Van Knippenberg et al., 2004).⁷³ Furthermore, promoting equity and inclusion not only benefits individuals by providing them with opportunities for involvement and growth but also strengthens the organisation as a whole by harnessing the full potential of its diverse workforce. Embracing

⁶⁵ Innovate UK, no date; The Innovation Caucus, 2022; Van Knippenberg et al., 2020.

⁶⁶ Cheung et al., 2016.

⁶⁷ Hoever et al., 2012.

⁶⁸ Hülshager et al., 2009.

⁶⁹ Leroy et al., 2022.

⁷⁰ Van Dijk et al. 2012.

⁷¹ Van Knippenberg et al., 2024.

⁷² Houdek, 2022.

⁷³ Van Knippenberg et al., 2004.

D&I is, therefore, a crucial strategy for achieving organisational success in an increasingly globalised world.

Inclusive decision-making processes ensure that all voices are heard and considered, reducing the risk of groupthink and biases. This inclusion fosters a more comprehensive analysis of issues and potential solutions, leading to better-informed decisions. Moreover, when employees feel respected and valued, their engagement and willingness to contribute are heightened, further improving the quality of decisions. If that information and those perspectives are shared and discussed, diverse teams are likely to outperform more homogeneous teams where members are more likely to have similar information and perspectives (Van Knippenberg et al., 2004).

Diverse teams are also better equipped to understand and address the needs of a broad customer base, as they bring insights from different demographic and cultural backgrounds. This enhanced understanding can lead to decisions that better align with market demands and customer expectations. An example of using minority group representation to foster D&I within the organisation is presented in the case study example in Box 6 below, and more detail about this practice is available in Annex A.

Box 6 - The *Inclusiecollectief Ambassadeurs* initiative

The *Inclusiecollectief Ambassadeurs* initiative, implemented by HVO-Querido, uses storytelling and representation to foster D&I within the organisation, as well as to spread awareness of D&I topics at external events. Originating as an informal workshop in 2022, it evolved into a formalised platform where ambassadors are able to share personal stories, give representation to diverse communities, and provide guidance and expertise regarding the importance and development of D&I policies in businesses within the Amsterdam municipality. This initiative aims to connect the personal narratives of ambassadors with structural D&I goals, ensuring that authentic representation and company engagement are present across organisational levels and market needs.

As noted in the review by Kaur and Arora (2020)⁷⁴, a number of studies including Grafstein (2019)⁷⁵, Greensbach (2019)⁷⁶, and Rohwerder (2017)⁷⁷ deal with benefits in terms of problem solving and decision making as a result of diversity of the sexes. However, there is more limited evidence for other diversity dimensions (although some is reviewed in Section 5.4.2 for instances where these effects support better financial performance).

The same arguments equally apply to the public sector. Diversity of thought is crucial for effective decision-making, particularly in the public sector where policies and decisions impact a broad and diverse population. Research has shown that organisations with diverse teams are better at generating creative solutions and avoiding groupthink, which can lead to more effective and innovative public policies.⁷⁸

5.4.5. Company reputation

Reputation is an intangible asset that has a direct impact on an organisation's ability to maintain external stakeholder trust, loyalty, and competitive advantage. Overall, reputation

⁷⁴ See Kaur & Arora, 2020.

⁷⁵ Ibid.

⁷⁶ Ibid.

⁷⁷ Ibid.

⁷⁸ See Next 100, 2022.

is important because it affects the perception and behaviour of clients and business partners, i.e. a positive image can be a factor in purchasing decisions, whereas a negative image can lead to refusal to buy products from the given company (Vysekalová, Mikeš, Binar, 2020).⁷⁹ A commitment to equity, fairness, and ethical conduct is important to ensure that a company is perceived as a fair organisation.

D&I in the workplace can deliver several benefits related to companies' reputation and image. Specifically, such policies contribute to an enhanced public image of companies which helps companies attract and retain talent, improve customer and business partner relationships and improve competitiveness.

D&I policies add to corporate reputation because they meet the increasing expectations of stakeholders for social responsibility. According to Herring (2009)⁸⁰, a diverse workforce tends to mean higher profitability, a greater customer base, and more revenue, adding to an organisation's reputation as progressive and forward-looking.

Racial and ethnic diversity plays a big role in shaping corporate reputation within multicultural markets. Companies perceived as more socially responsible are those that can practice racial and ethnic inclusion. Hewlett et al (2013)⁸¹ note that culturally diverse teams are much better equipped to handle the complex global markets and have more credibility and earn trust internationally. Neurodiversity-centred workplace policies can have a range of benefits, including improved corporate reputation (Austin & Pisano, 2017).⁸²

Progressive values of companies that support LGBTIQ inclusion appeal to the socially aware consumers. Companies offering family-friendly policies, like flexible working conditions and parental leave, signal positive message on work-life balance to employees and the public, as noted in Ajayi et al (2021)⁸³. Socioeconomic diversity is also an important, yet often overlooked, area of D&I that contributes to corporate reputation. Organisations that deal with economic disparity through inclusive hiring or community investment signal their commitment to social mobility. These actions speak to those stakeholders who value equity and inclusion in corporate behaviour (UNICEF, 2020).⁸⁴

The reputational benefits of D&I extend to investor relations, especially in terms of environmental, social, and governance (ESG) criteria. Investors are increasingly interested in firms that have D&I integrated into their strategies. They view inclusivity as a mark of long-term resilience and ethical governance (Nordea, 2023)⁸⁵. According to EY (2017)⁸⁶, ESG-compliant organisations are more attractive to socially responsible investors. On the contrary, organisations that do not implement diversity policies may run a risk of harming their reputation. Ely & Thomas (2001)⁸⁷ also add that exclusionary practices erode trust and fiscal stability, further supporting the inclusion of D&I in organisational strategies.

There are, however, some gaps in the available literature as regards the benefits of diversity for organisational reputation. Although sex and racial diversity have received considerable

⁷⁹ Vysekalova, J., Mikes, J., Binar, J. Image a firemní identita. Praha: Grada, 2020

⁸⁰ Herring, 2009.

⁸¹ Hewlett et al., 2013.

⁸² Austin & Pisano, 2017.

⁸³ Ajayi et al., 2021a.

⁸⁴ UNICEF, 2020.

⁸⁵ Nordea, 2023.

⁸⁶ Ernst & Young, 2017.

⁸⁷ Ely & Thomas, 2001.

attention, dimensions of neurodiversity, disability, socioeconomic inclusion, and religion or beliefs are less researched.

5.4.6. Customer satisfaction

A better connection with a diverse set of customers/clients can lead to better performance. When catering to a diverse clientele, it is more likely that a diverse and inclusive organisation will understand their clients better, making clients more satisfied with its products and services. In addition, having a diverse workforce makes it more likely that it is considered an attractive, appealing, and legitimate organisation (Ely & Thomas, 2001).

Even though there are limited reports and studies that specifically examine customer satisfaction stemming from diversity (Wagana and Nzulwa, 2016⁸⁸), efforts have been made recently to demonstrate that D&I can affect customer satisfaction in several ways. Specifically, firms that prioritise sustainability, including social sustainability (diversity, inclusion and social policies) tend to have more engaged customers, better reputation and good relationships with customers and stakeholders (Christensen, Hail, & Leuz, 2021).⁸⁹ In addition, Culture Plus Consulting (2018)⁹⁰ examined how customer satisfaction and employer brand perceptions may vary between different groups, and tracked supplier diversity metrics, suggesting that there is a positive correlation between diversity and equality and customer satisfaction.

Diversity policies can support an organisation's ability to better understand and meet the needs of a diverse customer base, especially for organisations that operate global and multicultural environments. For example, McKay et al (2011)⁹¹ investigates the impact of employee diversity (in terms of gender, racial origin, and age) on customer satisfaction within a large US retail organisation. Their findings confirm that diversity positively correlates with customer satisfaction, as measured a year later. In addition, D&I positively affect customer satisfaction as they enhance understanding of customer needs, improve service quality, and improve customer relations.

Specifically, companies with a diverse workforce are better positioned to understand and anticipate the needs of their customers (Hewlett et al, 2013).⁹² This is because employees from different cultural and demographic backgrounds can provide diverse insights into customer preferences and behaviours and draw attention to points that might not be apparent as result of groupthink dynamics. Such understanding is likely to contribute to efforts by companies to tailor their products and services more effectively, leading to higher customer satisfaction.

Some studies (see Aras-Beger et al, 2021⁹³; Christensen, Hail, & Leuz, 2021⁹⁴; Mishra et al, 2010⁹⁵) also highlight the importance of CSR, which includes D&I elements. Companies that demonstrate efforts towards CSR benefit from improved reputation, boosting innovation and customer trust positively impacting on customer loyalty (Mishra et al, 2010).

⁸⁸ Wagana & Nzulwa, 2016.

⁸⁹ Christensen et al., 2021.

⁹⁰ Culture plus Consulting, 2018.

⁹¹ McKay et al., 2011.

⁹² Hewlett et al., 2013.

⁹³ Gizem & Taşkın, 2021.

⁹⁴ Christensen, et al 2021.

⁹⁵ Mishra & Damodar, 2010.

A similar argument can be made for the public sector. Public sector organisations with a workforce that mirrors the diversity of the population are better positioned to understand and meet the needs of diverse communities. Having a diverse workforce can lead to a better understanding of the needs of different demographic groups, which, in turn, can improve service delivery and client satisfaction. For instance, in healthcare or social services, a diverse team is more likely to be sensitive to the cultural nuances that affect patient care or social welfare, leading to better outcomes for clients.⁹⁶ This ability to connect with a diverse clientele is not just beneficial for performance metrics but is also essential for fulfilling the public sector's mandate to serve all citizens equitably. This alignment fosters stronger relationships and trust between the government and the citizens it serves. The reduced risk of negative publicity related to discrimination or bias can further contribute to maintaining public trust.⁹⁷

5.4.7. Organisational culture

Organisational culture drives employee behaviour and can be both written and unwritten. It constitutes the values of the organisation and drives employee behaviour, and it is a factor contributing to a firm's success (Yavas & Rezayat, 2003).⁹⁸

D&I policies thus do not only have direct effects in terms of easier recruitment and staff retention but also provide guidance for individual and organisational behaviour that creates an environment where everyone feels valued and respected. This, in turn, can result in structural change with an impact across the whole organisation. This relates to both diversity and/or inclusive environment (McKay & Avery, 2015⁹⁹; Holmes et al, 2021¹⁰⁰, Dwermann et al 2016¹⁰¹; Boehm et al, 2014¹⁰²; Nishii, 2013¹⁰³) and wider cultural changes relating to a fairness culture.

In addition, inclusion enables reaping the benefits of diversity, so by creating an inclusive culture/environment, retention rates are higher of diverse employees, there is more information sharing and integration (information elaboration), higher job satisfaction among diverse employees, and therefore also higher performance.¹⁰⁴ An example of how D&I policies can elicit positive changes in organisational culture is illustrated by a case study from an Italian social cooperative (see Box 7, and Annex A for more information).

Box 7 - The *LavoriamoCi* and *Soci Caffè* initiatives as organisational culture case study examples

The *LavoriamoCi* initiative, developed by Impronta Etica, combines practical workshops and collaborative exercises among the organisation's members to embed D&I principles within workplace practices. *LavoriamoCi* serves as a structured programme addressing D&I in areas such as recruitment practices, workplace language, and organisational culture. It runs in tandem with *Soci Caffè*, a series of informal discussions between

⁹⁶ Ibid.

⁹⁷ Deloitte, 2021.

⁹⁸ Yavas & Rezayat, 2003.

⁹⁹ McKay & Avery, 2015.

¹⁰⁰ Holmes et al., 2021.

¹⁰¹ Dwermann et al., 2016.

¹⁰² Boehm et al., 2013.

¹⁰³ Nishii, 2013.

¹⁰⁴ See Puritty et al., 2017; Nishii, 2013; Shore, 2011.

member companies on key sustainability topics. Through open discourse and providing tools for real-world application of D&I strategies for business, the initiative aims to establish inclusive environments where values are integrated into daily operations. Combined, *LavoriamoCi* and *Soci Caffè* connected best practice exchange with tangible D&I business goals to assist *Impronta Etica*'s members move from theoretical understanding to actionable change, creating safer, more inclusive environment and external interactions.

5.4.8. Fairness and equity (wider societal fairness case)

A fairness and equity (ethical) case is a crucial part of any case for D&I in the workplace. In fact, some studies highlight the risks of relying primarily on the business case as opposed to the fairness and equity argument. For example, Stark et al (2021) highlight the risks of instrumental vs moral diversity rationales in the education sector.¹⁰⁵ Similarly, Trawalter et al (2016) found risks of presenting the case for diversity by framing it as good rather than fair.¹⁰⁶

D&I is important not only for achieving better outcomes and cultural changes within the organisation but also for ensuring fairness and equity in society at large. For example, a diverse and inclusive public sector workforce can contribute to social cohesion by ensuring that all groups within society feel represented and valued. This is particularly important in diverse societies where social stability can be undermined by feelings of exclusion or marginalisation.

In addition, the public sector has a unique responsibility to uphold social justice and equity, not just within its workforce but also in the broader society it serves. By prioritising D&I, public sector organisations can help address historical inequalities and promote fairness in employment and service delivery. For example, inclusive hiring practices can provide opportunities for marginalised groups who have historically been underrepresented in the public sector.¹⁰⁷

D&I in the workplace make societies fairer, with an associated potential for macroeconomic gains. Fairness stimulates efficient allocation of resources and greater macroeconomic performance. Diversity makes markets more resilient and creative, reducing systemic inequalities that advance in the absence of D&I practices. This, in turn, fosters social cohesion and economic equity. Such broader impacts make D&I a strategic priority for economic agents both on firm and country level. Box 8 summarises two case studies demonstrating how implementing D&I policies were effective for two organisations at developing internal equity and promoting societal good through interactions with external bodies (see Box 8; and Annex A for further information).

Box 8 - The *Open to Knowledge* campaign and *EnterprisInGirls* organisation

The *Open to Knowledge* campaign, implemented by Akava, Confederation of Unions for Professional and Managerial Staff in Finland, is part of a wider range of activities the association carries out to develop D&I within the organisation, its members, and Finland in general. This initiative aims to inform and discuss about LGBTIQ discrimination among

¹⁰⁵ Starck et al , 2021.

¹⁰⁶ Trawalter et al , 2016.

¹⁰⁷ See Next 100, 2022.

politicians, activists and various organisations active in the labour market. In the context of this campaign, Akava also works for a better equity legislation by collaborating with the relevant Ministries in Finland.

Since 2014, *EnterprisinGirls* in Italy has undertaken various activities aimed at building a network to enhance talent in the labour market by developing relationships among micro, small and medium-sized companies. The association also has a broader transversal objective of contributing to the dialogue for achieving gender equality, extending beyond the workplace. Its activities include awards, campaigns and information activities designed to promote talent and excellence while fostering gender-conscious culture to challenge and overcome stereotypes.

5.5. Potential for further benefits from wider D&I implementation in Europe

In this sub-section, we explore the potential for further benefits that could be gained from wider implementation of D&I policies and practices in organisations and companies in Europe. This section thus complements the research reviewed above by outlining the ‘gaps’ and future developments that emphasise the future importance of a wider application of D&I policies in Europe. We use existing data on past progress and the current state of D&I in the workplace (where available) to identify where key developments have already occurred and determine the potential for additional future gains. To better understand possible future developments, we synthesise the findings from the data analysis with reports on changing demographics in Europe.

The analysis uses key indexes, reports, and datasets on the progress made regarding D&I in the workplace. However, full datasets were unavailable, and insights had to be drawn from annual reports, datasheets or summaries. Table 1 clearly indicates the type of evidence available for each source and provides a brief description of its purpose and approach.

Table 1 - Indices, reports, and datasets used for the analysis of potential further benefits from wider implementation of D&I policies and practices in Europe

Name	Year	Description	Type of available evidence
Alliance for Global Inclusion Index	2021-2023	Surveyed global tech companies and companies with technical staff to assess their performance under the headings of people, market, and society; however, it features a relatively small sample size (over the years, number of respondents varied between 13 and 27)	Summary of data (2021 ¹⁰⁸) Report (2022 ¹⁰⁹ , 2023 ¹¹⁰)

¹⁰⁸ Alliance for Global Inclusion, 2024.

¹⁰⁹ Alliance for Global Inclusion, 2022.

¹¹⁰ Alliance for Global Inclusion, 2023.

Name	Year	Description	Type of available evidence
Diversity, Inclusion and Respect at the Workplace survey (European Commission)	2021	Surveyed ~45,000 Commission staff and executive agencies (10,199 respondents) about their perception of D&I at work	Summary fact sheet ¹¹¹
European Women on Boards (EWOB) Toolkit	2024	Assesses progress of stock-listed companies with registered HQ-office in the EU towards implementation of EU Directive on Gender Balance in Corporate Boards; uses Diligent database	Report ¹¹²
Ethnocultural minorities study (McKinsey)	2023	Assesses the size of ethnocultural minorities in 11 Western European countries, educational attainment, labour market participation, labour shortages and the resulting unfulfilled potential. Hiring ethnocultural minorities to address skills gaps could contribute to an additional €120 billion to EU-27 GDP annually.	Summary of the report ¹¹³
German D&I Monitor/Index (Beyond Gender Agenda)	2020-2023	Examines diversity management in DAX-30-companies (2020-2021) and DAX-40-companies (since 2022) by evaluating publicly available data on business performance, sustainability, diversity, and personnel management	Reports (for 2020 ¹¹⁴ and 2021 ¹¹⁵ only) Summative press releases (for 2021 ¹¹⁶ , 2022 ¹¹⁷ , and 2023 ¹¹⁸)
OECD: The state and effects of discrimination in the European Union	2024	Examines discrimination against people from people of different ethnic and racial origins, LGBTIQ people, persons with disabilities and religious minorities, and its role in closing well-	Report ¹¹⁹

¹¹¹ European Commission, 2022.

¹¹² European Women on Boards, 2024.

¹¹³ McKinsey, 2023.

¹¹⁴ Beyond Gender Agenda, 2020.

¹¹⁵ Beyond Gender Agenda, 2021b.

¹¹⁶ Beyond Gender Agenda, 2021a.

¹¹⁷ Beyond Gender Agenda, 2022.

¹¹⁸ Beyond Gender Agenda, 2023.

¹¹⁹ OECD, 2024.

Name	Year	Description	Type of available evidence
		being gaps between at-risk groups and the majority population.	
OECD Education at a Glance: OECD Indicators	2023	Analyses vocational education and training (VET) in OECD countries, including impacts of educational attainment or gender on employability and earnings	Report ¹²⁰
PwC Diversity, Equity & Inclusion Benchmarking Survey	2021-2022	Explores D&I programmes in companies and their impacts on employees, surveying companies across 19+ countries and 26+ industries	European Data Sheets ¹²¹
Refinitiv's/FTSE's D&I Index and European Equal Opportunities Index (FTSE Russell)	2024	Measures a set of metrics to identify top 100 publicly traded companies with most diverse and inclusive workplace (D&I Index); tracks performance of stocks promoting D&I in the workplace to support investment (Equal Opportunities Index)	Fact sheets ¹²²
Union of equality: EU defence industry, aeronautics and space sectors (DG DEFIS)	2022	Assesses equality, D&I in defence, aeronautics and space sectors by surveying and interviewing employees and employers and analysing relevant legislative framework at national and EU levels	Report ¹²³

5.5.1. Progress made and remaining challenges

The analysis of the sources captured in Table 1 above reveals valuable insights into the degree of implementation and impacts of D&I policies in various sectors, companies, and regions.

Overall, there appears to be **broad, albeit slow, progress** in promoting and implementing D&I measures in companies in the EU and globally. For example, diversity, equity and inclusion are identified as focus or priority areas by 85% of European organisations surveyed by PwC, while 72% have organised groups in place that aim to connect employees, implement programmes or provide support¹²⁴. Although it is difficult to measure the economic benefits of D&I policies and practices (such as employee networks) because the necessary data are often not collected at the company or sector level, in 2021, **88% of the German 30-DAX-companies associated added economic value with diversity in**

¹²⁰ OECD, 2023.

¹²¹ PwC, 2021;PwC, 2022.

¹²² FTSE Russell, 2024a; FTSE Russell, 2024b.

¹²³ European Commission DG Defence, Industry and Space, 2022.

¹²⁴ PwC, 2022.

their organisations.¹²⁵ Companies also appear to have recognised the potential of targeted training programmes for hiring managers and recruiters in addressing unconscious bias in recruitment, with the Alliance for Global Inclusion having observed a slight increase from 79% in 2022 to 81% in 2023¹²⁶.

However, progress is slow, and many companies have struggled to implement D&I policies within their structures. Only 3% of D&I programmes are thought to have reached full maturity¹²⁷. Even where companies associate economic value with increased diversity, their performance appears to lag behind. The German D&I Index found that the DAX-40-companies in Germany only reach, on average, 32.1 points out of a total 100 when assessed according to their recorded diversity management and performance data¹²⁸. Although the representation of women in leadership positions has increased since 2005, they often do not hold the most influential positions; based on data from 17 European countries¹²⁹, women only hold 6% of Chief Executive Officer positions and 16% of Chief Financial Officer positions¹³⁰. Labour market participation and career progression of ethnocultural minorities does not reflect their size and educational attainment.¹³¹ Similarly, challenges persist for LGBTIQ employees.¹³²

Smaller companies seem to perform worse¹³³, likely because they do not collate or publish data on their D&I policies and practices¹³⁴. Moreover, existing D&I programmes often target key diversity dimensions or areas (such as sex or recruitment) but overlook others. For instance, although addressing unconscious bias in recruitment is crucial to ensure D&I in the talent pool, it is merely one aspect. PwC found that in 2022 only 26% of surveyed organisations have training programmes in place that go beyond addressing unconscious bias in recruitment¹³⁵. Other diversity dimensions, such as ethnic or racial origin, cultural background, age, and disability, are frequently not prioritised, as demonstrated by the 2022 survey of European Commission staff which found that respondents who identify as a person with a disability or from an ethnic minority background are less satisfied with diversity practices in their organisation¹³⁶.

Therefore, **challenges remain** despite the progress that European companies have made. This means that the costs discrimination are still being incurred by companies and societies. Several studies have summarised or developed methods for estimating the cost of discrimination of LGBTIQ job seekers and employees. Miller & Parker (undated)¹³⁷ review the evidence on retention rates and the costs of recruitment in cases of lower retention rates. Open for Business subsequently applied some of the evidence in Miller & Parker (undated) to specific countries such as the Czech Republic and Slovakia; however,

¹²⁵ Beyond Gender Agenda, 2021, p. 7.

¹²⁶ Alliance for Global Inclusion, 2023, p. 35.

¹²⁷ PwC, 2022.

¹²⁸ Beyond Gender Agenda, 2023.

¹²⁹ Austria, Belgium, Denmark, Finland, France, Germany, Ireland, Italy, Luxembourg, Netherlands, Norway, Poland, Portugal, Spain, Sweden, Switzerland, United Kingdom.

¹³⁰ EWOB, 2024, p. 17; see also Beyond Gender Agenda, 2021, p. 9.

¹³¹ McKinsey & Company, 2023.

¹³² Deloitte, 2023.

¹³³ EWOB, 2024, p.5.

¹³⁴ European Commission DG Defence, Industry and Space, 2022, p. 21.

¹³⁵ PwC, 2022.

¹³⁶ European Commission, 2022).

¹³⁷ Miller & Parker, no date.

recruitment and retention benefits were not estimated.¹³⁸ World Bank (2023)¹³⁹ estimated the economic cost of exclusion of LGBTIQ jobseekers and employees in North Macedonia and Serbia, with the annual economic loss amounting to 0.51 per cent of GDP and the annual fiscal loss amounting to 0.13 per cent of GDP in North Macedonia and the annual economic loss amounting to 0.5 per cent of GDP and the annual fiscal loss amounting to 0.1 per cent of GDP in Serbia. Furthermore, Miller & Parker (undated) note that signalling openness to LGBTIQ candidates attracts non-LGBTIQ talent as well. Estimates by McKinsey (2023) of the potential GDP gains from advancing women's equality by comparing the current situation with parity in the labour market for employment rates, hours worked when in employment, and participation in higher productivity sectors, suggest that closing the gender gap could increase the annual GDP in Western Europe by 23 per cent.¹⁴⁰ Applying this estimate to the EU GDP as a whole suggest a potential increase of €3.9 trillion.¹⁴¹ Even if increased use of D&I policies contributed to a small reduction in these costs, the benefits would be substantial. Using estimates of the costs of age discrimination of older workers in US¹⁴² suggests an annual loss of GDP of around €640 billion.¹⁴³ As above, even if increased use of D&I policies contributed to a small reduction in these costs, the benefits would be substantial.

Yet, **two fundamental limitations to the available data** must be acknowledged. First, generalisability and comparability are limited because the available evidence differs methodologically (e.g. in approach and region of study). While overarching trends can be identified, it is difficult to draw certain comparisons due to the nature of the evidence. Second, the data focus predominantly on the extent to which D&I policies have been implemented in companies and the aspects that these policies aim to address.

5.5.2. Potential for further developments

Despite the limitations, existing data indicate that there are still **significant gaps in D&I** in European companies and that there is thus a clear **potential for further gains from more widespread implementation of D&I policies**, in particular, if these policies were to be based on the **recognition of all diversity dimensions, rather than focus on one or two specific aspects**. This potential is further underscored by **current demographic characteristics of the EU society and expected future changes** that are anticipated to make the need for D&I workplace policies even more acute in the future.

The analysis in this report suggests that there is a potential to harness further gains and benefits from more widespread implementation of D&I policies in the workplace across all benefit categories analysed in Section 5.4. Despite the progress identified for some of the diversity dimensions (see Section **Error! Reference source not found.**), change has been slow and significant challenges remain. It should also be noted that available evidence focuses on a few diversity dimensions, raising the possibility that there has been even less progress for the less studied dimensions. The conclusion that there is a potential for further gains can thus be applied to all diversity dimensions considered in this study, including sex,

¹³⁸ See Pride Business Forum, no date.

¹³⁹ See World Bank Group, 2023.

¹⁴⁰ McKinsey, 2023.

¹⁴¹ 23% of the EU GDP of around €17 trillion. Source of EU GDP: https://european-union.europa.eu/principles-countries-history/facts-and-figures-european-union_en#:~:text=GDP%3A%20as%20one%20of%20the,EU%20is%20%E2%82%AC17%20trillion.

¹⁴² AARP's (American Association of Retired Persons) study estimated that in 2018, age discrimination costed the U.S. economy about \$850 billion a year (in 2018 dollars).

¹⁴³ This estimate was adjusted for inflation and EU GDP. No adjustment was made for the share of workers aged 55+ since this share is estimated to be similar in the USA and Europe (based on AARP (2018) and Eurostat's labour force survey. This estimate assumes that the level of discrimination of older workers in the US and EU is similar.

racial or ethnic origin, nationality/citizenship, LGBTIQ, disability, neurodiversity, age, religion or belief, socioeconomic status, education/qualification level, political opinion, family composition/parental responsibilities (e.g. single parents, work-life balance) and work experience.

The remainder of this section presents example arguments highlighting the significant potential for further gains for the following four diversity dimensions: sex, age, racial or ethnic origin, and LGBTIQ.

Imbalances between the **sexes** in the workplace are reflected in the employment rates of young women compared to young men across all OECD countries. On average, the employment rates for 25 to 34-year-old women are between 6-25% lower than for men in the same age range, depending on their level of education¹⁴⁴. This is also directly reflected in earnings: on average, young women (25 to 34-year-olds) earn 20% less than young men. The disparity increases with age, with women between 45 and 54 years old earning 25% less than men of the same age¹⁴⁵. Other factors, such as flexible working patterns and job mobility, also play a role in this context¹⁴⁶. These data highlight the need for D&I policies to improve women's participation in the labour market and equal career progression.

Similarly, population ageing and increases in retirement age in the Member States are expected to increase the need for D&I policies that ensure a balanced workforce from the **age** perspective, such as labour market representation of the various age groups (including older workers) and the existence of mixed-age teams. Table 2 illustrates projections of the population's median age in EU27, demonstrating that the population is becoming older. This implies that, in a business-as-usual scenario, demographic trends may exacerbate future age disparities in the workplace, again underscoring the need for D&I policies to alleviate these developments.

Table 2 - Median age of the population in EU27

Entity	2025	2035	2045	2055
EU27 – median age of population (total)	44.8	46.6	47.7	48.3
Source: Eurostat (2023)				

However, if companies were to take additional steps to address the sex disparity in employment and earnings while also considering the role of age, talent pools may be widened, and business performance may be improved (in line with the previously mentioned positive relationship between diversity and business performance identified by Beyond Gender Agenda and EWOB). In addition, **there is a need to ensure balanced labour market participation of all ethnocultural groups. Migration poses an opportunity to harness the potential of increasing ethnic and cultural diversity in the workplace.** Eurostat data demonstrate that the migrant population¹⁴⁷ in the EU27 makes up a sizable part of the working-age population (c.f. Table 3), with the share of the migrant population being greater in younger age cohorts. This suggests that exclusion of minority ethnocultural groups would lead to greater aggregate economic inefficiency in the future due to the greater presence of minority groups in younger cohorts.

¹⁴⁴ OECD (2023), p. 77.

¹⁴⁵ OECD (2023), pp. 91-93.

¹⁴⁶ OECD (2023), p. 95.

¹⁴⁷ Used as a proxy for minority ethnocultural groups. However, it is recognised that the two terms do not fully overlap.

Table 3 - Proportion of migrant population in EU27 by age group

Entity	15-29 years	30-34 years	35-39 years	40-44 years	45-49 years	50-54 years	55-59 years	60-64 years
EU27 – percentage of migrant population	22.4	11.2	10.7	9.5	7.8	6.2	4.7	3.6
<p><i>Please note: The dataset was filtered by country of citizenship (to include migrant population from EU27 (from 2020) except reporting country; European Free Trade Association except reporting country; Non-EU27 countries (from 2020) nor EFTA countries; Non-EU27 countries (from 2020) nor reporting country; Foreign country and stateless).</i></p> <p><i>Source: Eurostat (2023)</i></p>								

Ethnocultural minorities are generally highly educated with the share of ethnocultural minorities with higher education being estimated to be 31% in the Netherlands, 36% in France, 24% in Germany and 44% in Denmark.¹⁴⁸ Implementing D&I programmes that aim to diversify the workforce's ethnic and cultural backgrounds could, therefore, allow companies to access potentially overlooked members of the available workforce in the labour market.

Similarly, there is a potential for significant further gains from fairness and inclusion as regards LGBTIQ job seekers and employees. According to Statistics Netherlands (2024), 18 percent of the population aged 15 or older in the Netherlands (2.7 million people) are LGBTIQ^{149, 150}. At the same time, there is evidence of discrimination in the workplace¹⁵¹ and evidence of LGBTIQ people preferring employers that signal that they will be treated fairly (see Section 5.4). In conclusion, there is thus a significant potential for gains for employers and societies from D&I policies targeting LGBTIQ people.

Whilst much of the above also applies to the private sector, it appears that the challenges in the public sector may in some instances be even greater than in the private sector. The AWEI is a well-known national benchmark for LGBTIQ workplace inclusion in Australia and includes the largest and only national employee survey designed to assess the overall impact of inclusion initiatives on organisational culture, as well as on both identifying and non-identifying employees. It provides a comparative benchmark for Australian employers across all sectors, including public sector organisations. In 2017, for example, 27 public sector entities participated in the Index. The 2017 results revealed some concerning findings for the public sector. While most respondents were neutral about whether being 'out' had impacted their career progression, the percentage who felt it had a positive impact was lower in the public sector (18%) compared to over 32% in other sectors. Additionally, the percentage reporting a negative impact was much higher in the public sector, with 10% reporting this, compared to 5% in the private sector, 3% in higher education, and none in the not-for-profit sector. The percentage of those reporting bullying was also highest in the public sector (39%), compared to 28% in the private sector. Survey results are not published according to individual organisations.¹⁵²

¹⁴⁸ McKinsey, 2023.

¹⁴⁹ LGBTIQ: lesbian, gay, bi-plus, transgender, queer, and intersex.

¹⁵⁰ Statistics Netherlands, 2024.

¹⁵¹ Bruegel, 2022.

¹⁵² See Bruegel, 2022.

5.5.3. Conclusions on the ‘potential’ for further gains from increased D&I

Although the project team could not access comprehensive datasets, we drew insights from various sources, demonstrating that while broad, albeit slow, progress has been made to implement D&I programmes in European companies, there is further room for improvement and, consequently, for gains to be accrued by companies and societies at large.

In particular, companies have struggled with fully implementing D&I policies within their structures and tend to focus their efforts on a few diversity dimensions (such as sex) or processes (such as hiring or recruitment). The *Diveristiteit in Bedrijf* initiative from the Netherlands (see Box 9, and Annex A) outlines how to develop and embed D&I within organisations. The analysis of demographic data indicates that additional benefits and gains could be reaped by promoting diversity across different diversity dimensions and their intersections.

Despite pointing towards a missed opportunity that companies could seize, the available data does not allow us to quantify the precise extent of possible benefits and gains. Key conclusions from this chapter have been summarised in Box 10.

Box 9 - Diveristiteit in Bedrijf case study example

Diveristiteit in Bedrijf (*DiB* – Diversity in Business) is an initiative targeting the advancement of D&I policies and practices across workplaces in the Netherlands. Managed by the Sociaal-Economische Raad (SER), an NGO advisory body on socio-economic matters, *DiB* provides businesses with structured guidance and support on how to “embed (and develop) D&I into [their] organisational DNA”. The initiative offers a comprehensive suite of practical tools and expertise, including a platform for knowledge-sharing and cross-organisational collaboration. By developing environments where employees of all identities, backgrounds, and abilities are empowered, *DiB* encourages organisations to move beyond superficial diversity metrics to initiate meaningful, sustainable cultural and structural change. Its strategic planning frameworks and emphasis on accountability ensure not only internal transformation but also broader societal awareness of the importance of inclusion, making *DiB*, managing the Dutch Diversity Charter, a cornerstone for workplace equity across public and private sectors in the Netherlands.

Box 10 - Key conclusions on the business case

This study identifies a range of potential benefits for private and public sector organisations from D&I in the workplace, including easier staff recruitment and retention, improved performance, increased innovation and creativity, more effective problem solving and decision making, improved organisational culture and team interaction, reputational benefits, improved customer satisfaction, and contribution to societal fairness, equality, and well-being.

Available indicators suggest progress on D&I. However, the pace is slow and there is a need for further progress.

Also, D&I efforts often focus on a few diversity dimensions and there is a need for a more comprehensive approach that targets all diversity dimensions.

There is thus a clear potential for further gains from more widespread implementation of comprehensive D&I policies.

This potential is further emphasised by current demographic characteristics of the EU society and expected future developments. For example, population ageing and other demographic changes are likely to make the need for D&I even more acute in the future.

6. Findings related to impact of Diversity Charters and the EU Platform

This section sets out the findings from the study regarding the impact of the work of Diversity Charters and the EU Platform of Diversity Charters. The focus for the Charters is collective rather than individual (although examples are provided where appropriate to illustrate findings). The aim is to initially present information relating to the scale of Charters' membership across the EU and the motivations for signing up to or not signing up to the national Diversity Charter. We then identify the main types of information and services provided, along with findings relating to which services are considered most useful to signatories. Later sub-sections then explore actions that organisations have put into place following contact with the Charters, barriers that they have faced and the impacts that those actions have had on D&I in the workplace. Findings relating to the national Diversity Charters conclude with identifying additional supports that could lead to increasing the number of signatories and improving the impact of the work of Charters.

The section also provides information on the work of the EU Platform of Diversity Charters, highlighting activities undertaken as well as feedback from the Diversity Charters on the usefulness of the different services that it provides.

6.1. Introduction

The Commission has been funding an EU-level Platform of Diversity Charters since 2010 which now consists of 27 Diversity Charters across all Member States, with Malta being the last one to join the Platform in 2024. Membership of individual Charters has been increasing since the first ones were established.

As detailed on the European Commission website, Diversity Charters at Member State level “encourage organisations (NGOs, public bodies, private companies...) to develop and implement D&I policies¹⁵³.”

Signing up to a Diversity Charter involves organisations making voluntary commitments to promote equal opportunities in the workplace, irrespective of age, disability, gender, racial or ethnic origin, religion or belief or sexual orientation. Once an organisation becomes a signatory to a Diversity Charter, they gain access to support and advice from an organisation running the Charter in a Member State as well as access to an extensive peer network, publications and supporting tools for benchmarking, measuring and monitoring.

6.2. Coverage and activities of Diversity Charters

6.2.1. Charter signatories

Data provided by the Directorate-General Justice and Consumers at the European Commission regarding the number of signatories in each Member State is presented in Table 4 below. This has been supplemented by a review of Commission webpages and Charter websites to identify the year of establishment for each Charter.

¹⁵³ European Commission, no date.

Table 4 - EU Diversity Charters year of establishment and signatories

Member State	Year of establishment	Number of signatories at January 2024
Austria	2010	371
Belgium	2005	217
Bulgaria	2020	68
Czech Republic	2014	120
Croatia	2017	105
Cyprus	2019	63
Denmark	2011	25
Estonia	2012	198
Finland	2012	103
France	2004	5,250
Germany	2006	5,576
Greece	2019	250
Hungary	2016	82
Ireland	2012	66
Italy	2009	940
Latvia	2019	67
Lithuania	2018	27
Luxembourg	2012	294
Malta	2024	-
Netherlands	2015	416*

Poland	2012	293**
Portugal	2016	470
Romania	2018	240
Slovakia	2017	146
Slovenia	2017	213
Spain	2009	1701
Sweden	2010	155
TOTAL		17,456

Source: DG JUST European Commission (by email)

Malta only established in 2024 – no data on membership

* A source from the Charter suggests that there are now more than 500 Charter signatories¹⁵⁴ but the original figure provided by the Commission has been left in the table for consistency with the total.

** An amended figure of 329 for January 2024 has been provided for Poland by the Polish Charter in December 2024, but the original figure provided by the Commission has been left in the table for consistency with the total.

Charters attract signatories of varying sizes and cover a range of organisation types, with SMEs constituting a prominent role in half of those interviewed (5 out of 10). For example, one Southern Charter indicating that its membership is composed of 60% private-sector companies, 25% public-sector entities, and 15% NGOs, reflecting a balanced representation. However, one Eastern Charter has a membership dominated by private companies, with minimal rural participation, highlighting regional and sectoral differences within Member States.

6.2.2. Charter establishment and set-up

The year of establishment for Charters is provided above in Table 4, with the earliest one established in France in 2004 and the most recent in Malta in 2024. Diversity Charters across EU Member States were typically established through a combination of national legislative demands and EU-level support. Many, such as one Western Charter were launched in response to legal developments such as anti-discrimination legislation, aiming to incentivise D&I efforts¹⁵⁵. Similarly, an Eastern Charter aligned with the European Corporate Sustainability Reporting Directive (CSRD), demonstrating how regulatory frameworks sometimes drove support within Member States to establish a Charter. All Charters were initiated as voluntary frameworks, offering organisations structured guidance and support on D&I policies and practices.

¹⁵⁴ SER, no date d.

¹⁵⁵ WCH1 INT.

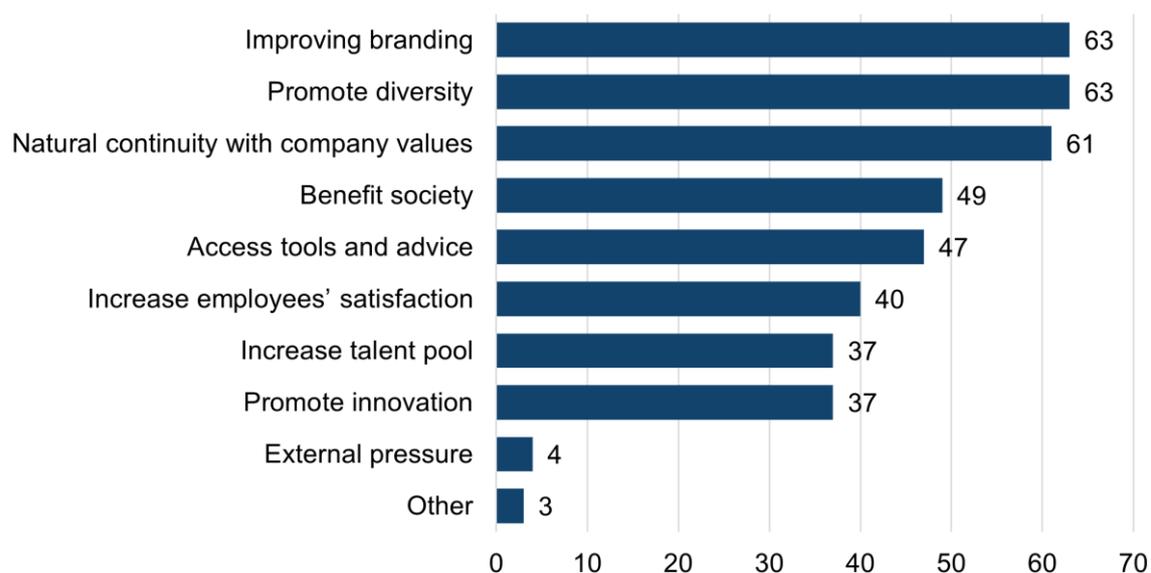
However, both the governance and funding structures exhibit significant variability across Member States. In some Member States, the Charter operates on limited financial resources, often relying on pro bono efforts (e.g. Ireland), which constrained Charter outreach and activity. In contrast, other Member States integrated the Charter into existing governmental bodies (e.g. Netherlands), thus benefiting from partial government backing and financial contributions from municipalities and foundations. Such differences ultimately influenced the scope and accessibility of Charter services. Further, whilst some Charters, such as in Estonia, initially offered free membership to lower participation barriers, others employed a tiered fee structure that varied according to signatory size in order to maintain their operations.

Some distinct regional disparities manifested in the organisational approaches of Charters. Two Charters interviewed in the Southern and Eastern regions¹⁵⁶, noted that regional participation is uneven, with lower engagement in rural areas due to limited awareness or concern for diversity issues as well as economic disparities¹⁵⁷. Meanwhile, Northern and Western Member State Charters, as was the case for one particular Northern Charter, reported high levels of integration with broader NGO initiatives, focusing heavily on member-driven learning¹⁵⁸.

6.2.3. Motivations for becoming a signatory

Survey respondents were asked to identify their reasons for signing up to their national Charter and the following figures provides the results. The most common reasons offered fall into the “societal benefits” category, with promoting diversity and to benefit society being the two most common responses. Other common responses focused on support to implementing D&I policies through the tools and advice provided by Charters and to promote innovation within organisations.

Figure 5 - Reasons for becoming a Charter Signatory



Source: D&I survey. N=80. Multiple answer question.

¹⁵⁶ Please see Annex E which sets out how Member States have been allocated to regions. Reference to Annex E can be made for all further references to Southern, Northern, Eastern and Western regions in the document.

¹⁵⁷ SCH2 INT; ECH4 INT

¹⁵⁸ NCH1 INT.

Charters that were interviewed identified a range of motivations for their members becoming signatories, including:

- access to resources;
- networking opportunities;
- bringing their organisation into alignment with national, international (in the case of multinational companies), and EU-level regulatory frameworks;
- promoting employee engagement; and
- branding benefits for signatories (highlighted by 5 of the 10 Charters interviewed) , with signatories using their membership to their respective national Charters to enhance organisation's image.

Interviews with signatories provided deeper insights into their motivations for signing up to a national Charter. Across the EU Member States signatories, the primary motivation for becoming signatories to their national Charters was their alignment with existing organisational values and internal directives, with over half of interviewees identifying this as a key driver. For example, signatories from Cyprus and Denmark emphasised how the D&I principles exhibited by their national Charters reflected their own core philosophies¹⁵⁹. Similarly, Lithuanian and Italian signatories regarded their Charters as a strategic tool to support previously under-resourced organisations and formalise their existing D&I frameworks¹⁶⁰. In fact, around well over half of signatories interviewed echoed this sentiment, stating that Charters provided organisations with invaluable access to structured frameworks for advancing D&I initiatives. Networking opportunities with other businesses were also a significant motivator for the majority of interviewees, particularly for organisations in Eastern and Southern European regions, where businesses tended to rely more heavily on external support and funding to mitigate their resource limitations.

Indeed, regional differences were identified as additional drivers for attaining signatory status. In Northern and Western Europe, some signatories leveraged their Charters to enhance and mature D&I company initiatives that had been embedded within the organisation for some time¹⁶¹. In contrast, several Eastern European signatories viewed the Charter as an essential collaborative partner for tackling societal issues like mental health, LGBTQIQ rights and anti-discrimination – aspects which still bore some social taboo within their respective national contexts¹⁶². Global socio-political movements like 'Black Lives Matter' and '#MeToo' were cited as external drivers for organisations in the Netherlands and Greece to become Charter signatories¹⁶³. Southern European signatories, including in Italy and Spain, focused on using the Charter to assist SMEs and NGOs in being able to adopt and implement D&I measures¹⁶⁴ – over half of interviewed signatories believed the Charter had a crucial role to play in compensating for an organisation's limited internal resources.

Only a limited number of respondents to the survey provided reasons for not becoming a signatory to their national Charter. These are set out in the following figure which indicates that after a lack of awareness, the most common reason related to their non-signatory status was no immediate need for the organisation to sign up. A number did indicate that they

¹⁵⁹ SIG_CY_1 INT; SIG_DK_1 INT.

¹⁶⁰ SIG_LT_1 INT; SIG_IT_1 INT.

¹⁶¹ SIG_FI_1 INT; SIG_DK_1 INT.

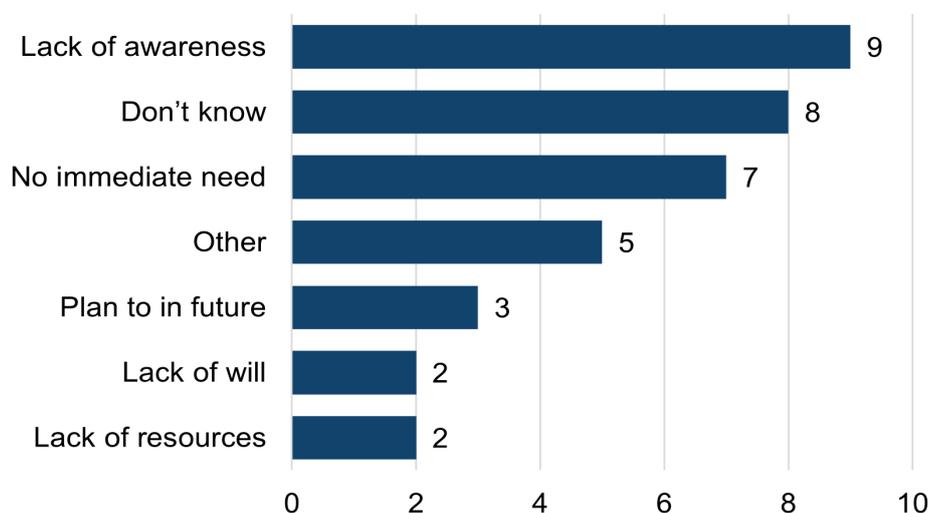
¹⁶² SIG_PL_2 INT; SIG_LT_1 INT; SIG_HR_1 INT.

¹⁶³ SIG_NL_1 INT; SIG_EL_1 INT.

¹⁶⁴ SIG_IT_1 INT; SIG_ES_1 INT.

were planning to do so in the future, with lack of resources and lack of will being identified as other reasons for not becoming a signatory.

Figure 6. Reasons for not becoming a signatory to a Charter



Source: D&I survey. N=33. Multiple answer question. Note: 'lack of capacity' was not selected by any respondents.

Other reasons given for not becoming a signatory to the national Diversity Charter included:

- The Charter does not fully implement D&I.
- Chose not to sign the Charter but continues to work with members to implement D&I in its activities, keeping in mind the Charter framework.

Interviews with two non-signatory organisations provided additional reasons for not signing up to national Charters¹⁶⁵. Reasons were varied, but they reveal commonalities in their critiques of the Charters framework and alignment with organisational realities. According to a Western region non-signatory organisation, their national Diversity was perceived as a “symbolic gesture” rather than standing as a substantive mechanism for delivering on D&I, suggesting that the membership fee grants access to the Charter's logo without ensuring accountability or the monitoring of member actions. This criticism reflected a sentiment expressed by other signatories and non-signatories alike that some Charters lacked enforceable mechanisms to ensure that their principles translated into meaningful actions¹⁶⁶. Additionally, the non-signatory found the Charter's cautious approach and limited financial resources problematic, as these reduced its ability to impose binding measures.

Similarly, a Southern region non-signatory organisation regarded the Charter ill-suited to its small-scale organisational structure, comprising only four staff members. The organisation viewed the formal requirements of the Charter as disproportionately burdensome for micro-organisations, preferring instead to focus on integrating D&I into its own operations informally. The non-signatory has shifted its role to promoting the Charter among its own member organisations rather than opting for its own signatory status; a shift that was initiated by a pragmatic recognition of its organisation's resource limitations. For the Southern region non-signatory, prevalent cultural and political factors play a significant role

¹⁶⁵ Due to the fact that only two non-signatories were interviewed, all information has been anonymised, including internal references which identify the Member States where they are based, for data protection purposes.

¹⁶⁶ Insights from the two non-signatories. See also SIG_EE_1 INT; SIG_CY_1 INT; SIG_EL_1 INT; SIG_NL_1 INT.

in the national discourse, where discussions of D&I, particularly gender equality and maternity leave, remain politically sensitive.

In sum, for the Southern region non-signatory, the prevailing socio-political climate within the region reportedly made engagement with D&I topics more challenging. But as was the case with the Western region non-signatory, their reasons for not signing their national Charter were rooted in perceived systemic and structural inefficiencies within the Charter.

6.2.4. Thematic areas covered by Charters

Diversity Charters cover a range of D&I socio-economic and demographic categories and differ from Member State to Member State. The most common ones across most Member States identified in the literature review¹⁶⁷ were gender/sex, disability/ability, racial or ethnic origin, sexual orientation, age, and religion/belief.

The gender/sex category was mentioned in the literature review as being covered by Charters in 16 Member States, of which most (9) correspond to the Eastern region. A similar pattern can be seen for disability/ability, sexual orientation, ethnic/racial origin and religion/belief. In the case of family circumstances, LGBTIQ diversity, and social and cultural background, these are mentioned in between 5 and 7 Member States, from Eastern, Northern and Western regions. Educational diversity and nationality are mentioned in Member States from Eastern, Western and Southern regions **Error! Reference source not found.**

The full results from the literature review on categories covered by Diversity Charters are presented in Table G-1 in Annex G, along with sources reviewed.

6.2.5. Activities, Information and supports provided

Support in the creation of D&I policies (through the development of actions plans and programmes), training, awareness campaigns, research and publications, workshops, conferences and networking appeared most frequently during the literature review conducted as part of the study. Less commonly reported activities were assistance with recruitment practices/HR policy, supporting and mentoring for refugees or migrants to find jobs and assistance/advice on internal and external communication.

The most often quoted types of information provided by Charters during the literature review were labour market analysis, statistics and publications, best practices and guidelines on D&I policy implementation. Less commonly observed were legal advice information, and information on the benefits and impacts of diversity, and the least often observed were information supporting and mentoring refugees or migrants to find jobs and on internal and external communication.

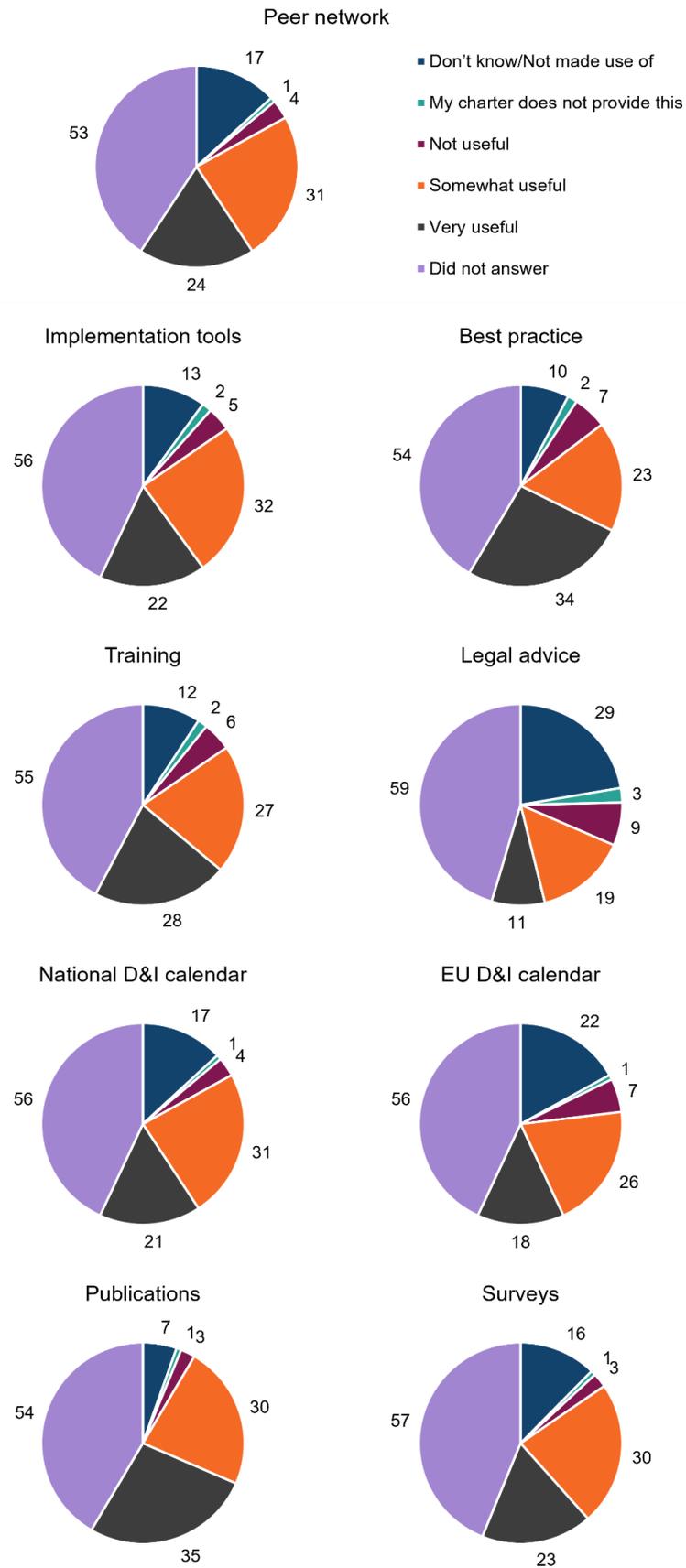
Provision of D&I publications, best practice examples, training and access to the peer network were considered by the most survey respondents as being key services provided by Diversity Charters that were either somewhat useful or very useful to them in their work. Legal advice and an EU calendar of D&I events were considered not useful by a higher proportion of respondents. The full results are depicted in Figure 7 below.

¹⁶⁷ It is important to note that data obtained from the literature review presented in Annex G derive from multiple sources. These sources covered different individual and combinations of Member States. Where a particular category covered by a Member State was recorded in the literature, it is included in Table G-1 in Annex G. However, none of the sources covered all Member States, so if some categories or topics related to D&I were not mentioned in these sources, it does not mean that the Diversity Charters do not cover these.

Accessing support from other sources played a critical role in shaping the D&I strategies of the non-signatories interviewed. The Western region non-signatory organisation revealed that external funding from the government was the primary enabler of their D&I initiatives, with a government ministry providing 90% of the funding for their projects. The organisation also worked with other entities to exchange knowledge and training opportunities. However, there was a notable gap within available support to strengthen internal capacity-building, which ultimately restricted the organisation's ability to advance its operational D&I goals. It is noted that signatory organisations interviewed in the Eastern region also mentioned additional external support provided by other organisations (apart from the national Charter) as helpful for shaping their D&I policies and practices.

Regional government funding was instrumental for the Southern region non-signatory in implementing their targeted projects. This organisation additionally relied upon membership fees in order to provide D&I-related training and resources to its member organisations. Collaboration with other partners further strengthened its capacity to deliver impactful initiatives and mitigate additional financial burdens. However, the lack of D&I frameworks specifically tailored to micro-organisations was cited as remaining a significant challenge.

Figure 7. Usefulness of support/information provided



Source: D&I survey. Single answer question.

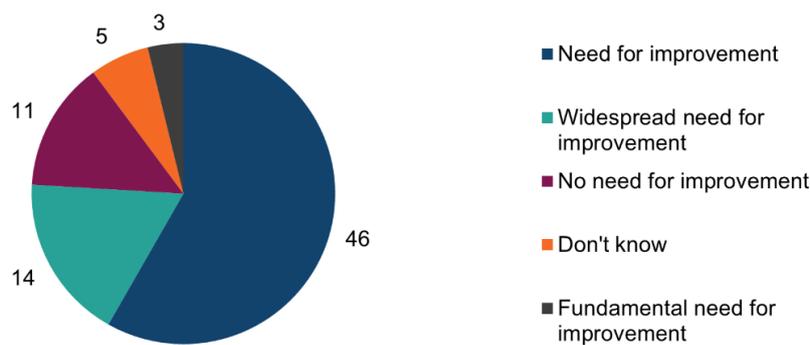
6.3. Actions taken by organisations

6.3.1. Actions taken and introduction/implementation of policies and practices

Status prior to Charter support

The survey provided self-reported status of D&I policies within signatory organisations prior to them signing up to the Charter. The following figure shows that in total, 63 respondents agreed that their organisational D&I policies required improvement, where 46 respondents felt their policies needed improvement and 14 indicated that there was widespread need for improvement, with a further 3 saying that they were in fundamental need of improvement. This pattern was largely mirrored across different sized and types of organisations as well as across the geographical regions. Of the 11 respondents who felt there was no need for improvement, 10 were from Southern and Eastern Europe (5 each).

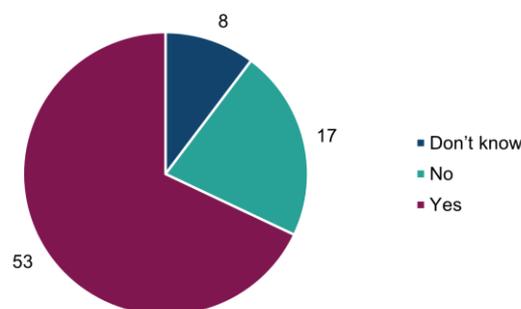
Figure 8. Status of signatories' D&I policies prior to joining Charter



Source: D&I survey. N=79. Single answer question.

Survey results in the figure below suggest that the majority of organisations responding were of the view that membership of a Charter has resulted in increased willingness and impetus within their organisation to introduce new and strengthened D&I policies/practices, although it is noted that around a quarter of respondents answered that it had not.

Figure 9. Becoming a signatory has increased willingness/impetus to introduce new and strengthened D&I policies/practices



Source: D&I survey. N=78. Single answer question.

Overall view of actions taken by organisations after contact with Charters

The most widespread actions taken by organisations following contacts with the Diversity Charters identified in the literature were development and implementation of specific policies, designing specific plans or strategies, training of staff in D&I topics and practices and making specific commitments within organisations. Less frequently mentioned actions were establishing Diversity committees or departments (in 6 Member States), focussing on gender parity (5), promoting LGBTIQ diversity internally (4), and improving human resources practices (4).

Support for working parents and diverse age groups was reported as being implemented in 3 Member States in Eastern and Southern regions and flexible working identified as an action in 3 Member States in Western, Southern and Eastern regions, while support for refugees was provided in 2 Member States from the Eastern region.

Other actions taken by signatories' organisations, in 4 Member States, are:

- Anonymous reporting box and the establishment of a commission to evaluate complaints, in Lithuania¹⁶⁸
- Co-financing healthcare, in Poland¹⁶⁹
- Languages courses, in Malta¹⁷⁰
- Diversity audits, in Slovakia¹⁷¹

The full results from the literature review¹⁷² on categories covered by Diversity Charters are presented in Table G-1 in Annex G, along with sources reviewed.

When asked specifically about policies/actions organisations had undertaken in the survey, eleven responses (the vast majority from organisations in Southern Europe) were received as presented in Table 5 below.

Table 5 - Actions taken following contact with Diversity Charters

Area	Actions
Self-Assessment	<ul style="list-style-type: none"> • Participation in the European Diversity Barometer* • Self-Diagnostics to Assess D&I
Participation in D&I Events	<ul style="list-style-type: none"> • Promoting and participating in the European Diversity Month, joining commemorative day initiatives • Joining D&I campaigns carried out in the region and promoted by the Charter

¹⁶⁸ Diversity development group, no date.

¹⁶⁹ Maturity in Managing Diversity and Inclusion in the workplace in Poland 2021.

¹⁷⁰ PWC, 2023.

¹⁷¹ Sukalova & Ceniga, 2020

¹⁷² Data presented from the literature review presented in Annex G derives from multiple sources. These sources covered different individual and combinations of Member States. Where actions taken in a Member State were recorded in the literature, they are included in the table above. However, none of the sources covered all Member States, so if some actions were not mentioned in these sources, it does not mean that organisations did not take these actions in other Member States.

<p>Training and Learning</p>	<ul style="list-style-type: none"> • Attendance at Unconscious Bias course • Organisation of D&I training seminars for staff • Sharing case study examples as implemented with other organisations
<p>Policy development and implementation</p>	<ul style="list-style-type: none"> • Introduction of a Diversity and Equality policy • Update of the D&I policy in the entire company Group • Adaptation of internal D&I regulations • Development and introduction of internal corporate welfare and well-being policies, mainly oriented towards the enhancement of gender equality • Undertaken path to gender equality certification • Ensuring that Director signs Charter membership letter to secure leadership commitment and raise awareness of commitments both internally and externally
<p>*European Diversity Barometer was initiated by the Luxembourg Charter, with support from the European Commission. It is the first diversity observatory for signatories to the European Diversity Charters and provides a common platform to track progress of diversity & Inclusion policies at national and European levels, as well as providing resources for European Diversity Charters.</p> <p>**European Diversity Month is part of the European Commission's long-term commitment for diverse and inclusive workplaces and societies. Organised each May, it aims to raise awareness about the importance of diversity and inclusion in the workplace and across societies. It sets out to celebrate organisations' efforts that help build equal and inclusive environments for all. Organisation and companies join the European Commission in celebrating diversity and inclusion in the workplace by organising their own internal and external events focused on the topic of diversity throughout the whole month.</p>	

Interviews with organisations running Charters in the Member States provided further information on actions taken by signatories. Charter signatories adopted a broad range of internal measures to advance their D&I policies as a consequence of Charter membership. The most typical of these measures included developing stringent internal policies (monitoring, training and awareness) as well as hosting internal and external discussions with stakeholders about their efforts. A majority of Charters reported that with their assistance, their signatories established various employee resource groups as an effective means of disseminating important D&I matters and information, providing support and raising awareness across organisational structures (see Box 11 and Annex A). For example, according to one Western Charter, a prominent transportation signatory demonstrated their organisation-wide commitment to D&I by appointing board-level diversity representatives, to ensure accountability and representation at the highest levels¹⁷³.

Box 11 - Employee Resource Groups as case study example

Employee Resource Groups (ERGs), or 'Worker Networking Groups', are voluntary initiatives that bring together employees sharing common characteristics such as gender, racial or ethnic origin, sexual orientation, disability or other shared experiences. These groups have been assisting in the ongoing development of D&I policies within organisations across Europe. ERGs strengthen diverse perspectives, provide mentorship opportunities, and promote cultural change by challenging internal biases. ERGs can positively impact career progression, leadership diversity, and workplace culture. Their

¹⁷³ WCH1 INT.

successes have been driven by the presence of executive support and data-driven evaluations.

Two case studies presented in Annex A (see practice 8.13 and 8.16) outline how ERGs are implemented across a range of organisations. The first case study of a software company illustrates how ERGs play a key role in fostering collaboration across diverse identities, both within the company and in local communities. These ERGs focus on important social aspects, including disability awareness, neurodiversity, and LGBTIQ advocacy and by encouraging collaboration among its eight ERGs, the company enhances inclusivity, strengthens partnerships, and reinforces its reputation as a socially responsible employer.

The second case study presentation gives an example of a Polish communications organisation which also utilised the power of grassroots, employee-driven ERGs to drive equality and inclusion. Its women's network evolved from an informal initiative to a formalised pillar of the company's D&I strategy, benefiting from financial and executive support.

Similarly, signatories to one Eastern Charter were greatly focused on applying gender equality initiatives, which included developing balanced management representation, supporting employers in addressing pay disparities (in preparation for mandatory compliance in 2026), as well as implementing work-life balance measures to ensure employee wellbeing and account for varying familial responsibilities¹⁷⁴. Tailored actions often address specific needs or challenges. In a Southern European Charter, construction firms integrated migrant workers by addressing language barriers and providing local housing support¹⁷⁵. An example from Greece outlines how the fair pay and inclusive benefits practice was implemented covering all employees regardless of their role or employment type (see Box 12 and Annex A).

Box 12 - Fair pay and inclusive employee benefits case study example

Since 2017, a canned fruit and vegetable production company based in Greece has been developing and implementing fair pay and inclusive employee benefits to enhance employee recruitment and retention. These practices include fair pay based on objective and transparent criteria, coverage for sick leave and medical expenses, additional paid annual leave, and bonus payments. In 2024, the company earned the 'Great Place to Work' certificate from the Great Place To Work® Institute for fostering a high-trust workplace culture. During the certification process, 94% of employees reported making a meaningful contribution to the company. As a result of these practices, the company has fostered positive employee attitudes towards working conditions and management, which, in turn, improved workforce recruitment and retention.

Monitoring progress

Charters also emphasised the importance of monitoring progress. This was particularly evident in both a Western and Eastern Charter, where structured frameworks for assessment and reporting were integral to the Charters' operations. In this particular Western Charter, signatories were required to develop a D&I action plan within six months of signing the Charter and to report on their progress periodically¹⁷⁶. Starting in 2024, the Charter transitioned from annual to biennial reporting, compiling data from self-

¹⁷⁴ ECH3 INT.

¹⁷⁵ SCH2 INT.

¹⁷⁶ WCH3 INT.

assessments and qualitative interviews with signatories¹⁷⁷. The Eastern Charter example developed an annual survey, conducted since 2020. It stands as another robust example of a Charter monitoring their signatories' D&I progress¹⁷⁸ (see Box 13 and Annex A). This 80-question survey serves as a diagnostic tool, helping organisations assess their D&I practices, benchmark against sector standards, and identify areas for growth. Results are shared with signatories through personalised feedback reports, enabling them to adjust their strategies effectively. Participation in this survey will become mandatory from 2025¹⁷⁹. Another Eastern Charter also performed annual assessments with signatories, using a standardised methodology to track progress in implementing D&I measures¹⁸⁰. These assessments helped Charters to distinguish between assumed and actual challenges, allowing them to prioritise actions based on evidence. An additional Eastern Charter is currently preparing for the introduction of mandatory gender pay gap reporting by 2026, a development that requires signatories to establish data collection and monitoring systems in advance¹⁸¹.

Box 13 - The D&I monitoring measures case study example

The *Diversity IN Check (DINC)* initiative was launched in Poland in 2020 by the Forum Odpowiedzialnego Biznesu – *Responsible Business Forum (FOB)*, the longest-running and largest governmental organisation in the country, responsible for the coordination of the Polish Diversity Charter. The *DINC* survey is certified, meaning it follows and adheres to scientifically rigorous standards and measurement criteria (SDGs, OECD Guidelines, and ISO 26000) to produce an annual diagnostic tool helping organisations to assess their D&I maturity and adopt effective strategies. By promoting accountability and knowledge sharing, *DINC* has empowered participating organisations to improve their processes, policies and practices, leading to transformative changes. As noted by one such participating business, "*DINC is a checkpoint*" that enables organisations to align their D&I practices both comprehensively and consistently across operations, from supply chains to client relations.

Signing the Charter drove transformative changes within organisations, with many signatories reporting significant progress in developing and implementing D&I initiatives. One of the most notable changes was the adoption of structured monitoring systems, with two-thirds of organisations implementing new tools or enhancing existing ones to track their progress. For instance, one Polish communications signatory began using Charter-backed surveys to assess D&I maturity and benchmark themselves against peers, providing clear areas for improvement.

Interviews with signatories allowed those interviewed to expand on the changes made within their organisations. Prior to becoming signatories, only half of the organisations interviewed reported that they had any formal D&I frameworks in place. Instead, they relied on informal practices such as embedded codes of conduct, ad hoc initiatives, or unwritten inclusivity norms. Signing the Charter acted as a catalyst for change, prompting organisations to formalise their D&I efforts and implement structured policies and monitoring systems. An example of a formalised D&I workplace programme is presented in Box 14 (see also Annex A).

¹⁷⁷ Ibid.

¹⁷⁸ ECH1 INT.

¹⁷⁹ Ibid.

¹⁸⁰ ECH3 INT.

¹⁸¹ ECH4 INT.

Box 14 - D&I workplace awards programme case study example

An international automotive industry organisation established the D&I Workplace Awards Programme, a central global initiative designed to recognise employees' efforts and initiatives in fostering diverse and inclusive teams. The Awards highlight workers' and teams' success stories from everyday experiences in the workplace, demonstrating the tangible benefits of implementing D&I principles. By celebrating these achievements, the Awards can inspire staff members and other companies.

For smaller organisations, the Charter framework provided the structure needed to accelerate the adoption of new D&I measures¹⁸². One signatory to the Lithuanian Charter, for example, saw a threefold increase in participation at D&I events, rising from 15 to 50 attendees per session within two years of signing¹⁸³. Similarly, a signatory organisation from Cyprus introduced clearer recruitment processes and job postings to attract more diverse applicants¹⁸⁴.

Recruitment

Recruitment practices were another area of significant development. An organisation in Finland expanded its anonymous recruitment programme to include a larger proportion of new hires, while an organisation from the Netherlands reported a 15% increase in diverse hiring through qualitative tracking methods¹⁸⁵. An organisation in Lithuania introduced accessibility-focused recruitment strategies, such as removing discriminatory language from job advertisements and creating roles designed to include people with disabilities¹⁸⁶. In a Swedish energy company targeted recruitment for migrant workers through initiatives like "warm-up jobs" proved successful, with 80% of participants transitioning into permanent roles within the organisation¹⁸⁷.

A signatory organisation from Cyprus also reported that the Charter framework provided much-needed structure and guidance, allowing them to implement measures such as inclusive job postings more rapidly than would have been possible otherwise¹⁸⁸. Smaller organisations benefited greatly from the Charter's framework, which allowed them to formalise previously informal practices. The organisation from Cyprus, for instance, implemented clearer protocols for diversity-driven hiring, while the one from Croatia focused on creating citizen interaction protocols to address biases in the public sector¹⁸⁹.

A Finnish forestry company expanded its anonymous recruitment capacity to include 25% of new hires, demonstrating a clear focus on reducing bias in hiring practices. A Dutch signatory organisation introduced qualitative data-driven processes to track internal diversity, which directly resulted in a 15% increase in hires from underrepresented groups.

An example of a coordinated international action in a border region is provided in Box 15 and Annex A.

¹⁸² SIG_CY_1 INT; SIG_LT_1 INT.

¹⁸³ SIG_LT_1 INT.

¹⁸⁴ SIG_CY_1 INT.

¹⁸⁵ SIG_NL_1 INT.

¹⁸⁶ SIG_LT_1 INT.

¹⁸⁷ SIG_SE_1 INT.

¹⁸⁸ SIG_CY_1 INT.

¹⁸⁹ SIG_CY_1 INT; SIG_HR_1 INT.

Box 15 – *Interregionale Gewerkschaftsrat Bodensee* as a case study example

Since 2016, the *Interregionale Gewerkschaftsrat Bodensee* (IGR Bodensee), an interregional council of local trade union representatives in Germany, Switzerland, Austria and Liechtenstein, has implemented a joint annual press tour across the four member countries in the region of Lake Constance. The press tour highlights challenges affecting workers in the cross-border labour market and potential solutions shared by its member organisations. It functions as a key tool to support IGR's aim of representing and promoting the socio-economic, ecological, cultural, and political interests of workers around Lake Constance.

Leadership involvement and awareness raising

Leadership involvement increased significantly after signing the Charter. More than half of the signatories established dedicated roles, such as D&I Officers or Well-being Managers, to oversee implementation. One Polish signatory reported the appointment of a D&I lead who spearheaded initiatives like Women's Networks and employee-driven mental health programmes, fostering inclusivity from within¹⁹⁰. External engagement also grew, with several organisations partnering with local institutions to build a pipeline of diverse talent. A signatory in Estonia partnered with local universities to create pipelines for young talent¹⁹¹, a strategy mirrored by a signatory organisation in Italy, which focused on bridging generational gaps through knowledge-sharing between younger and older employees¹⁹². These initiatives highlighted a shift towards integrating D&I into broader societal and community engagement. In addition to internal and external changes, many organisations took steps to improve employee awareness and participation. Charter workshops, for example, inspired one Polish signatory to introduce allyship training programmes, which subsequently became embedded into their onboarding process¹⁹³. Such initiatives reflected a broader effort to cultivate a workplace culture aligned with D&I principles. A case study of strong leadership in D&I policy implementation is provided in Box 16 and Annex A.

Box 16 - A case study example of strong leadership in D&I policy implementation

Correos is the national postal service of Spain and is a state-owned public limited company headquartered in Madrid. Correos employs a range of management tools to encourage D&I. These include their D&I calendar, diversity plan, equality plan, and the framework and collective bargaining agreement. These allow Correos to *“have an ordered set of measures that diagnose, analyse, execute, correct, improve and monitor the actions carried out with the aim of achieving diversity and real and effective inclusion”*. Over 2023, Correos carried out over 130 D&I actions, and identified the benefits of managing D&I such as an improved working environment, more creativity and innovation, a greater sense of belonging, a better corporate reputation, and the ability to attract diverse talent.

Despite the progress, challenges remained. Resource constraints in smaller organisations limited the scope of implementation, particularly in regions like Southern and Eastern Europe. Nevertheless, their respective national Charter provided a critical framework that allowed organisations to implement transformative changes at a pace and scale that might not have been possible otherwise.

¹⁹⁰ SIG_PL_2 INT.

¹⁹¹ SIG_EE_1 INT.

¹⁹² SIG_IT_1 INT.

¹⁹³ SIG_PL_2 INT.

6.3.2. Factors facilitating the development and implementation of D&I policies within organisations

Diversity Charters across Member States reported during interviews that they utilised a combination of internal and external factors to facilitate the development and implementation of D&I policies within their signatory organisations. Leadership involvement was the most common facilitating factor cited as ensuring that top-level employees of organisations were committed, sufficiently informed, and in alignment with executing D&I policies. Indeed, leadership involvement was cited as a decisive component for the effective allocation of resources and driving the prioritisation of D&I strategies in the majority of the Charters. In an example provided by one Western Charter, a prominent signatory of theirs enacted these strategies by prioritising diversity and representation at the board level, ensuring a top-down approach that “led by example”¹⁹⁴.

Compliance with regulatory frameworks and legislation within Member states, and to a lesser extent on an EU-level, also played an important role for just less than half of the Charters¹⁹⁵. One Eastern Charter, for example, was closely aligned with the existing Corporate Sustainability Reporting Directive (CSRD), which compels organisations to develop and report on D&I strategies. Similarly, a Southern Charter’s signatories benefited from non-financial disclosure requirements required by law, which mandates reporting on social and environmental impacts. Organisations are required to comply with a range of national and EU level legislation, policies and frameworks relating directly to or which include provisions for Diversity & Inclusion and these can provide clear impetus for organisations to develop and expand their diversity/inclusion actions and strategies. Such regulatory/policy initiatives include (but are not limited to) the Corporate Sustainability Due Diligence Directive (CSDDD), Corporate Sustainability Reporting Directive (CSRD), Directive on “Empowering Consumers for the Green Transition”, European Sustainability Reporting Standards (ESRS), Green Claims Directive and Sustainable Development Goals (SDGs). Those listed here are described in more detail in Annex B.

Community and collaboration were other essential enablers in the vast majority of Charters, particularly where networking opportunities were structured to promote knowledge sharing. Signatories for one Eastern Charter, for instance, trained other members free of charge while gaining positive exposure, illustrating the mutual benefits of collaborative approaches facilitated by Charter membership¹⁹⁶. Regional initiatives, such as one Southern Charter’s rotation of participating in events across regions, ensured accessibility and helped disparate organisations overcome geographical barriers¹⁹⁷.

Crucially, Charters with well-funded or subsidised operations provided a supportive ecosystem for their signatories. An Eastern Charter attained initial state-backed funding which provided free participation for its signatories for 12 years, significantly lowering the barrier to entry and fostering widespread adoption¹⁹⁸. Similarly, municipal and foundation subsidies in one Western Charter enabled the Charter to maintain its operational scope, negating instances of limited direct government funding¹⁹⁹. A case study example on the dissemination of good practices through different channels is provided in Box 17 and Annex A.

¹⁹⁴ WCH1 INT.

¹⁹⁵ ECH3 INT; ECH4 INT; ECH1 INT; SCH1INT.

¹⁹⁶ ECH1 INT.

¹⁹⁷ SCH1 INT.

¹⁹⁸ ECH4 INT.

¹⁹⁹ WCH3 INT.

Box 17 - Dissemination of good practices through different channels by Fundación Diversidad

Since its foundation in 2009, Fundación Diversidad has been actively promoting and supporting the implementation of D&I policies among companies and public institutions in Spain. The organisation is committed to disseminate D&I good practices through various channels, including training sessions and webinars, communication campaigns, networking activities and D&I awards. Key success factors include leveraging new technologies, such as a well-designed website and online events, to broaden outreach and accessibility, alongside fostering partnerships with role model organisations to inspire peer-to-peer learning. Simplifying processes with ready-to-use tools and adapting strategies to local contexts ensure broader participation and effective implementation of D&I initiatives.

6.3.3. Challenges and barriers related to D&I implementation

Key areas posing challenges and barriers to organisations implementing D&I were identified in the literature review. Some of these focused on the main areas usually covered by D&I policies in terms of the area of discrimination to be addressed (gender equality, sexual orientation/sex/gender identity/harassment, integration of diverse age groups and disability, migrant status), whereas others focused on the challenges/barriers faced by organisations when looking to develop and implement D&I policies (unconscious bias or stereotypes, resistance to change or lack of motivation, difficulties integrating D&I within organisations, measuring the impact of D&I measures, ensuring consistent global implementation and cultural differences/conflicting value systems).

Highlighted were challenges relating to overcoming ingrained cultural biases and securing organisations' long-term commitment to implementing D&I initiatives. Ascertaining, and maintaining, internal support and commitment from employees (internal buy-in) as well as integrating D&I policies within core business strategies were also highlighted as being demanding areas. There were additional concerns regarding unintended consequences, such as negative spillover effects – creating challenges elsewhere within the organisation - or initiatives backfiring.

Resistance to change was mentioned in literature on Member States from Eastern, Northern and Western regions; insufficient resources was mentioned in Member States from Eastern, Northern and Southern regions. Lack of awareness or belief was mentioned in Member States from all regions. Lack of leadership support and language barriers were identified in Member States from Eastern and Southern regions, while lack of expertise, stereotypes, complexity integrating refugees, and absence of formal processes for implementing D&I were only identified by Eastern Member States.

Some of the literature also highlighted that the use of top-down approaches to implementation, an absence of effective employee engagement, or the lack of strong role models, as well as a general deficit in understanding or awareness about D&I's value, could significantly hinder policy implementation. Additionally, financial constraints and the absence of formalised processes make it harder to sustain meaningful changes. Some organisations also suggested that negative responses from non-targeted groups, superficial progress toward diversity goals, and the ineffectiveness of certain tools, like mandatory training or performance ratings may prevent lasting cultural shifts.

The full results from the literature review²⁰⁰ on the challenges and barriers faced by organisations implementing D&I are presented in Tables G-8 and G-9 in Annex G along with sources reviewed.

A range of barriers were identified by Charters during interviews. Barriers to membership involved both financial and cultural challenges. Financial constraints, for example, were mentioned by half of all Charters interviewed, including one Southern and two Eastern Charter examples, where imposed membership fees could often deter smaller organisations²⁰¹. Cultural resistance to LGBTIQ inclusion was also a significant challenge in two Charters from Eastern Europe, constituting half of all Eastern regional Charters interviewed²⁰², potentially reflecting broader societal attitudes and cultural variation across Member States.

Limited resource constraints emerged as the most significant challenge, impacting the majority of signatories interviewed. Smaller organisations, and those within Eastern and Southern Europe (Italy, Cyprus and Poland) were disproportionately affected, facing limited funding and therefore capacity to fully engage with Charter activities and requirements. In the Eastern region, the majority of signatories highlighted financial challenges restricting them to implement extensive D&I initiatives. One Croatian signatory reported additional public-sector restrictions that impeded their flexibility in adopting some of the Charter's more innovative practices²⁰³. Whilst financial barriers were less common for Western and Northern European signatories, they highlighted technological challenges as persistent issues; nearly half of signatories interviewed across these regions noted difficulties in adapting their systems to accommodate for AI and increased EU-wide digitalisation.

Beyond financial aspects, cultural resistance emerged as an additional issue, particularly within regions where certain diversity metrics were still not universally accepted within societies. In Eastern Europe, just less than half of signatories (including one Polish signatory²⁰⁴) found resistance to LGBTIQ inclusion, reporting that some staff regard these initiatives as ideological, rather than immediate organisational priorities. Such resistance was less pronounced amongst Northern and Western signatories, where Danish and Dutch signatories focused on developing inclusivity through legacy systems with client organisations, however these approaches were often slow to implement, once again because of under supported digital technologies²⁰⁵. Such variation would reflect ongoing socio-political differences across the continent and within national contexts.

6.4. Impacts at Organisation level

6.4.1. Positive impacts arising from actions taken

The online survey asked respondents about the benefits arising at organisation level following the introduction of policies and practices with support from Charters. Organisational culture was reported as the benefit by the largest number of respondents,

²⁰⁰ Data presented from the literature review presented here derives from multiple sources. These sources covered different individual and combinations of Member States. Where a particular challenge/barrier was recorded in the literature, it is included in the table above. However, none of the sources covered all Member States, and the data above and in Annex G only captures the number of Member States that were mentioned in the literature sources reviewed and does not imply that they do not apply in other Member States.

²⁰¹ ECH1 INT; ECH3 INT; SCH1 INT.

²⁰² ECH4 INT; ECH2 INT.

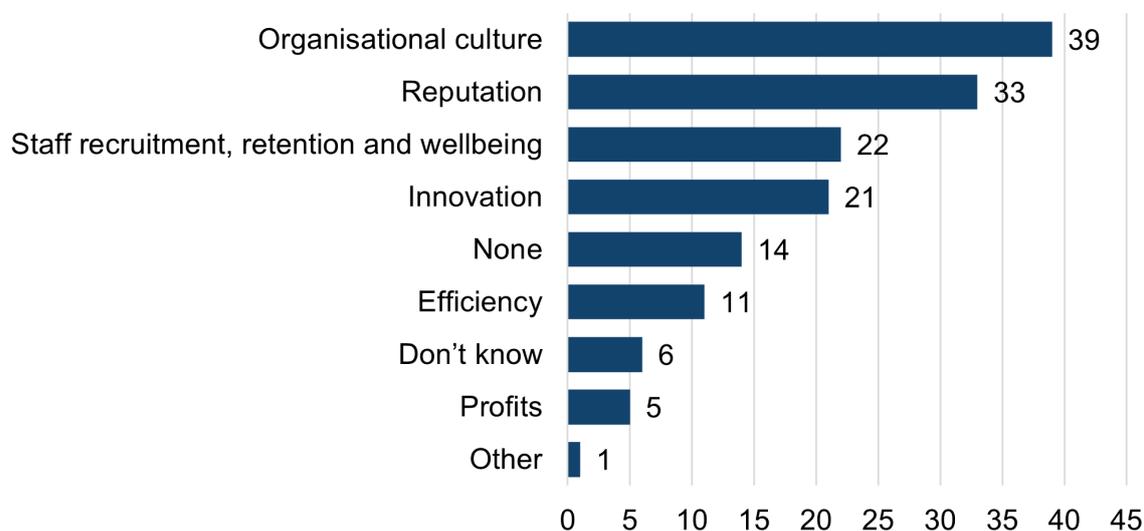
²⁰³ SIG_HR_1 INT.

²⁰⁴ SIG_PL_2 INT.

²⁰⁵ SIG_DK_1 INT; SIG_NL_1 INT.

followed by organisation reputation, staff recruitment and wellbeing and innovation (see Figure 10 below).

Figure 10. Benefits from implementing D&I policies and practices



Source: D&I survey. N=67. Multiple answer question. Note: Responses from signatories only

A similar range of benefits have been identified at organisational level from the literature reviewed as part of this study. Enhanced innovation and creativity was reported in most Member States, closely followed by improved employee engagement/retention and enhanced organisational reputation, followed by a positive atmosphere among employees and teams. Other benefits identified were enhanced flexibility, positive customer relations, improved corporate culture, enhanced cultural understanding, improved relationships between natives and non-natives, better problem-solving capabilities, sustainability, better market position, improvement of internal communication, and increasing trust in community and consumers. Box 18 reports on a range of benefits that resulted from a D&I framework implemented by a large financial organisation (see also Annex A).

Box 18 - A D&I framework implemented by a large financial organisation as an example of a good practice

The D&I framework of a large financial organisation has achieved significant progress in developing an inclusive workplace where all employees can thrive. With a focus on measurable outcomes, the framework has driven notable advancements, including increasing the representation of women in top leadership positions from 5% to 42% over the past decade, surpassing industry benchmarks. These achievements are underpinned by a comprehensive approach that combines strong leadership commitment, robust monitoring systems, and tailored initiatives addressing underrepresented groups. By embedding D&I principles into its business strategy and creating accountability through performance-linked metrics, the organisation ensures that its efforts are sustainable and impactful, benefiting employees, clients, and the organisation as a whole.

The full results from the literature review on the challenges and barriers faced by organisations implementing D&I are presented in Tables G-8 and G-9 in Annex G, along with sources reviewed²⁰⁶.

²⁰⁶ Data presented from the literature review presented in Annex G and summarised here derives from multiple sources. These sources covered different individual and combinations of Member States. Where a particular barrier/difficulty was

The benefits of implementing D&I policies were overwhelmingly positive across signatories during interviews, with the majority of interviewees reporting both enhanced organisational culture, public reputation and improved employee wellbeing and engagement. Enhanced workplace inclusivity contributed to greater team cohesion, innovation, and satisfaction, with one Polish communications organisation quantifying these outcomes through a 20% rise in employee satisfaction scores after participating in a Charter-backed survey²⁰⁷. Southern European signatories reported particularly strong public relations benefits. For instance, a Spanish signatory experienced a €1.57 million increase in media value as a direct result of their visibility and relationship with the Charter, showcasing the potential for D&I policies to enhance external perceptions²⁰⁸. Similarly, a Lithuanian social welfare organisation reported a tripling of employee participation in the Baltic Pride event over two years, reflecting greater employee buy-in and cultural alignment following their adoption of Charter principles²⁰⁹.

Quantifiable benefits were more commonly reported among organisations with robust monitoring systems. A Dutch signatory credited its anonymised recruitment practices with a 15% increase in diverse hires²¹⁰, while a Finnish forestry organisation noted a tangible improvement in retention rates among underrepresented groups, attributed to expanded mentorship programme²¹¹.

In addition to internal benefits, several signatories highlighted the positive societal impacts of their D&I initiatives. A Swedish energy company's "warm-up jobs" programme, which integrates migrant workers into full-time roles, achieved an 80% success rate, demonstrating the potential for well-designed programmes to address broader social challenges while enriching the workplace²¹². Across regions, these benefits highlighted the dual advantage of D&I policies in fostering organisational resilience and advancing societal equity.

During interviews, organisations running Charters suggested that Charter membership had measurable and qualitative impacts for signatories, from enhanced organisational culture to improved compliance with national and EU regulations. For example, a Western Charter commented on a 2020 study that found that 82% of their signatories were planning or implementing D&I measures, compared to just 34% of non-signatories²¹³. This demonstrates the influence of Charter support as a catalyst to elicit tangible organisational change.

Brand and reputational benefits were mentioned by half of all Charters interviewed²¹⁴, where signatories regularly leveraged the Charter's regional visibility to enhance the organisation's public perception. Signatories to a Southern Charter for instance, prominently displayed the Charter logo on their business correspondence (events, websites, internal documents) to show alignment with national and EU D&I standards²¹⁵. Signatories to an Eastern Charter benefited from increased visibility through events like an annual D&I conference, which

recorded in the literature, it is included in the table. However, none of the sources covered all Member States, and the data above only captures the number of Member States that were mentioned in the literature sources reviewed and does not imply that these benefits have not been observed in other Member States.

²⁰⁷ SIG_PL_1 INT.

²⁰⁸ SIG_ES_1 INT.

²⁰⁹ SIG_LT_1 INT.

²¹⁰ SIG_NL_1 INT.

²¹¹ SIG_FI_1 INT.

²¹² SIG_SE_1 INT.

²¹³ WCH1 INT.

²¹⁴ WCH1 INT; SCH1 INT; ECH3 INT; NCH1 INT; WCH3 INT.

²¹⁵ SCH1 INT.

attracted 60,000 online viewers and secured €20,000 in funding gleaned from notable media coverage and publicity of signatories' D&I efforts²¹⁶.

Charters also established accessible platforms for knowledge sharing, which was cited as one of the most valued impacts by the majority of Charters. Networking events, such as a Diversity Gala²¹⁷ or weekly sessions²¹⁸, enabled cross-sector collaboration and inspired signatories to adopt innovative D&I strategies.

Whilst the broader socio-economic impacts tended to not be quantified, specific examples from Charters indicated movement towards positive changes. An example comes from an Eastern Charter, who introduced a public recognition label in 2018 to showcase companies with strong D&I practices. It has enabled organisations to attract diverse talent and foster inclusive work environments²¹⁹. A similar scheme was practiced in other Eastern Charters²²⁰.

The most important lesson shared by signatories was that delivering on D&I requires sustained commitment, flexibility, and frequent adaptation. Data collection and monitoring was a critical tool for both tracking progress and identifying areas for improvement. The majority of signatories emphasised the importance of setting measurable goals and integrating these within organisational systems and strategies to ensure impactful compliance. Further to this was the value of engaging employees at all levels. Organisations like those within a Polish communications company, their Women's Network, were instrumental in driving internal cultural change²²¹. Indeed, bottom-up approaches allowed for D&I efforts to have greater resonance across the organisation and incentivising buy-in and commitment from staff. Overreliance on top-down approaches was reported to result in greater alienation, however, for D&I initiatives to flourish, bottom-up activation and collaborative work was equally as necessary.

Several signatories noted that embracing forms of incremental progress, rather than trying to solve their organisations' challenges in one fell swoop, was essential for managing resistance, motivating staff, and negating potential resource constraints. By setting realistic goals and celebrating small victories in D&I development, organisations were able to maintain their momentum and rally support necessary to elicit long-term changes.

6.5. Future plans and improving work of Charters and future supports

This sub-section is divided into two areas, the first focussing on areas where the work of Charters can be improved, and the second, specifically focused on the needs of non-signatories and incentivising them to join their national Charters.

²¹⁶ ECH3 INT.

²¹⁷ ECH1 INT.

²¹⁸ NCH1 INT.

²¹⁹ ECH4 INT.

²²⁰ ECH1 INT.

²²¹ SIG_PL_1 INT.

6.5.1. Improving work of the Charters

The survey respondents, including signatories, non-signatories and Charters themselves, made the following suggestions for improving the work of Diversity Charters to make them more effective:

- Improved communication;
- Improved access;
- Better adherence to commitments;
- Increased funding;
- Provision of tools.

Notably, many of these suggestions were also noted by non-signatory organisations (see below) as key considerations that would make them consider joining their national Charters.

Table 6 below presents more detail about specific recommendations clustering them by their thematic areas.

Table 6 - Suggestions for improving the work of Charters

Areas	Suggestions
Communication & Networking	<p>More regular communication from Charters on the practical implementation of D&I policies using consistent metrics across the EU. More forums for sharing experience.</p> <p>Establish a network of signatories to Charters and develop a platform for them to communicate directly.</p> <p>Better use of the Teams platform to share and communicate between Charters within the framework of the EU Platform of Diversity Charters (which includes the European Commission).</p> <p>Organise separate meetings for sectors in which to share experiences, ideas, and activities.</p> <p>Better sharing of information/practices through online tools and storage for easy access and retrieval (e.g. possibly through a database) use the EU Platform of Diversity Charters network more to organise joint events across Member States (online) and use experts from Charter signatories; partner more with EU institutions.</p> <p>Participation of members of the EU Platform of Diversity Charters' in national meetings with signatories and representatives of government, local government, or services such as Public Employment Service.</p> <p>Simplification of access to the platform [Comment from a signatory which may refer to either the EU Platform of Diversity Charters or Online Teams platform to exchange knowledge and resources]</p>

<p>Visibility & Outreach</p>	<p>Greater visibility and a more widespread presence on the main social channels (e.g., Instagram or LinkedIn).</p> <p>Greater possibility of benchmarking with similar public companies.</p>
<p>Resources & Support</p>	<p>Increased financial support from the European Commission for activities of Diversity Charters. Creation of a support structure, like a Secretariat, with a budget and operational framework for the Charters. To provide the network of Charters with a legal entity.</p> <p>Economic resources that allow Charters to develop products or services.</p> <p>Increase in staffing of Charters.</p> <p>Additional staffing resources would enable Charters to engage more actively in action-oriented initiatives, encouraging greater collaboration among Charters and their signatories. This would help develop competencies, facilitate knowledge-sharing, and enhance their effectiveness in advocating for the benefits of D&I.</p>
<p>Accountability & Compliance</p>	<p>Organisations to complete self-assessments to demonstrate activities and progress on D&I initiatives and anticipated future outcomes, and make these publicly available.</p> <p>In order for Charters to maintain credibility, membership should be withdrawn where organisations do not adhere to commitments.</p> <p>D&I should not be on a voluntary basis but should be sanctioned and enforced by legislation.</p> <p>Avoid use of Charter membership for the purpose of marketing and branding, as it is perceived as the equivalent of “greenwashing.”</p>
<p>Data & Benchmarking</p>	<p>Enhanced Data and Benchmarking Tools</p> <p>Develop more comprehensive tools for data collection, monitoring, and reporting on D&I progress among member organisations. This data can be anonymized and aggregated to showcase progress, highlight best practices, and identify areas needing improvement.</p> <p>Participation in D&I studies and benchmarking committees</p>

Looking ahead, during interviews signatories outlined ambitious plans to build upon existing D&I efforts, with most prioritising expanded training programmes and stronger external advocacy. The majority of those organisations interviewed expressed a commitment to addressing emerging challenges related to digitalisation and intergenerational collaboration. For instance, signatories from Sweden and Finland identified enhancing digital literacy and preparing the workforce for the impacts of AI and automation as core priorities²²². The Finnish signatory in particular aims to integrate inclusive practices into its technology-driven hiring processes to ensure fairness as digital tools become more prevalent²²³.

Eastern European signatories, such as one Lithuanian signatory, plan to focus on strengthening multicultural integration initiatives, recognising the importance of fostering inclusivity amidst shifting migration policies²²⁴. A Polish signatory, meanwhile, intends to expand its focus on mental health and youth diversity initiatives, leveraging Charter support to address these pressing societal challenges²²⁵.

For many organisations, the ultimate objective is to embed D&I more deeply into their structures and identities, ensuring these values remain central to their operations. For example, a signatory from the Netherlands has plans to refine its diversity metrics to align more closely with broader sustainability and corporate responsibility goals²²⁶. Similarly, a Danish shipping organisation aims to leverage its participation in Charter workshops to stay ahead of evolving D&I trends and maintain its position as a leader in inclusivity²²⁷.

Signatories in Southern Europe, such as a networking organisation in Italy, are focusing on building resilience against potential socio-political challenges by strengthening internal support systems and promoting intergenerational learning programmes²²⁸. This reflects a growing recognition of the need for adaptability and long-term planning in D&I efforts.

In summary, the future for D&I initiatives among signatories is marked by a commitment to innovation, collaboration, and the ongoing integration of inclusive practices. By addressing both internal organisational needs and external societal challenges, signatories aim to set a standard for inclusive workplaces across Europe.

6.5.2. Non-signatory needs

Provision of examples of best practice from relevant industry sectors, more training opportunities, publications/studies/reports and tools to support implementation were noted most frequently by non-signatory organisations in their online survey responses as key factors that would make them consider becoming a Diversity Charter signatory. Lower priority was placed on surveys and EU and national diversity calendars. Figure 11 below provides the full survey results.

Additional suggestions included:

²²² SIG_SE_1 INT; SIG_FI_1 INT.

²²³ SIG_FI_1 INT.

²²⁴ SIG_LT_1 INT.

²²⁵ SIG_PL_2 INT.

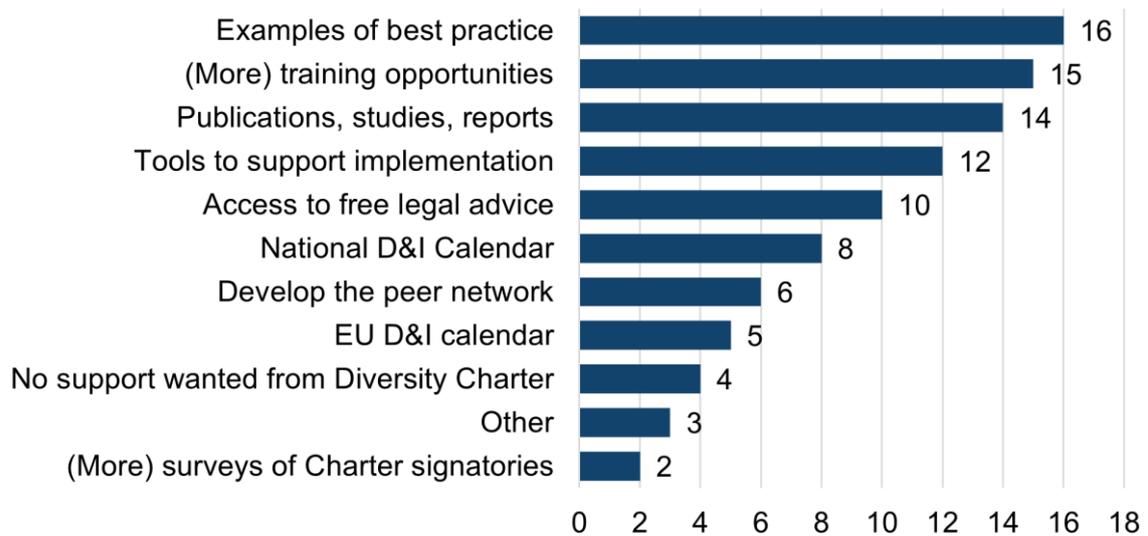
²²⁶ SIG_NL_1 INT.

²²⁷ SIG_DK_1 INT.

²²⁸ SIG_IT_1 INT.

- Enhanced implementation and monitoring, for instance conducting a study how effectively signatory organisations implement measures and policies promoted by the Charters.
- Improved accessibility by fostering a more open network, including non-signatory organisations, to encourage cross-fertilisation of ideas and good practices.
- Improving communication and outreach (including provision of materials in other languages) to ensure that organisations are aware of activities and opportunities created by the Charters.

Figure 11 - Support non-signatories would like to consider becoming signatories



Source: D&I survey. N=32. Multiple answer question.

Future support needs articulated by the non-signatories interviewed highlight the importance of tailored frameworks and accountability mechanisms (which aligns with the view of signatory organisations set out in Section 6.3 on the actions taken by organisations). One organisation advocated for the establishment of independent bodies capable of enforcing verifiable commitments and ensuring transparency. Measures such as mandatory progress audits and measurable performance indicators were identified as critical to fostering trust and legitimacy in D&I initiatives.

To effectively incentivise smaller organisations to join the Charter, non-signatory interviewees suggested creation of simplified and scalable tools that cater to micro-organisations and a clearer communication about the specific benefits of Charter membership. Strengthening collaborative networks to facilitate experience-sharing between organisations at different stages of D&I maturity was another key recommendation²²⁹.

Digitalisation and the increased prevalence of AI-driven decision-making were identified as significant imminent challenges for D&I efforts. For instance, AI posed noteworthy risks of algorithmic bias, which in turn was feared to lead to perpetuating existing inequalities²³⁰. Climate change and resource competition were also expected to exacerbate existing social inequities, with disproportionate effects anticipated to impact vulnerable groups.

²²⁹ NON_SIG_IT INT.

²³⁰ NON_SIG_DE INT.

From the perspective of one of non-signatory organisation, persistent gender inequalities, an ageing workforce, and the need for intergenerational dialogue were pressing concerns. They cited that the rapid pace of technological change demands upskilling and retraining efforts in order to bridge emerging workforce gaps. The non-signatory emphasised the relevance of organisations being able to integrate both social and environmental considerations into sustainability initiatives to address these types of challenges holistically²³¹.

Whilst the non-signatories bore differences in their approaches and operational contexts, both expressed a commitment to advancing D&I. Their critiques of their respective national Diversity Charter give crucial insights for refining their frameworks in order for Charters to better align with and support the needs of diverse organisations within Member States who have yet to become signatories.

6.6. EU Platform of Diversity Charters

The EU Platform of Diversity Charters was established in 2010 with support and funding from the European Commission. It provides an opportunity for Charters to gather together, share experience and discuss topics relating to the promotion of D&I, work of different Charters and to exchange information on best practices. The Platform acts as a central hub to signpost to Member State Charter websites, provide coordination support and also organises events for networking and exchanging best practices, including Platform meetings, expert seminars and high-level forums.

At a practical level, the Platform provides a range of support and services including:

- Charter Implementation toolkit (CIT)
- Diversity Self-assessment tool for organisations
- Newsletters
- Hosting of regular Charters' meetings

6.6.1. Charter Information Toolkit

The aim of the Charter Implementation Toolkit (CIT), designed in 2020, was to develop a comprehensive toolkit that brought together the wide and varied experience of EU Diversity Charters, the different tools developed and learning amassed over the previous 10 years. It is a resource that can be used by D&I personnel to “discuss, organise and build an understanding of the range of actions, ideas and tools that they can use to help signatories.”²³² The toolkit was developed through the collaboration of Diversity Charters and co-funded by the European Commission.

The CIT is designed as a compendium, “to give inspiration and ideas about activities and initiatives” that Charters and others (such as not-for-profit support associations, business intermediary organisations, specialised D&I support units etc.) can make use of.

The tool provides a brief history of Diversity Charters and their work, noting that they vary significantly in their length of time in operation, structure, size and funding mechanisms. Its development included:

- Stage 1 - gathering details on D&I tools;

²³¹ NON_SIG_IT INT.

²³² The Charter Implementation Toolkit (CIT), 2020.

- Stage 2 - assessing and classifying tools;
- Stage 3 - developing a CIT prototype (history of Diversity Charters and key areas of work, benefits of D&I, examples of activities, comprehensive list of resources and tools and global calendar of key D&I days);
- Stage 4 - testing of the prototype;
- Stage 5 - adapting it to the digital environment; and
- Stage 6 - capacity building of Charter personnel.

Regarding content, the tool is divided into sections covering:

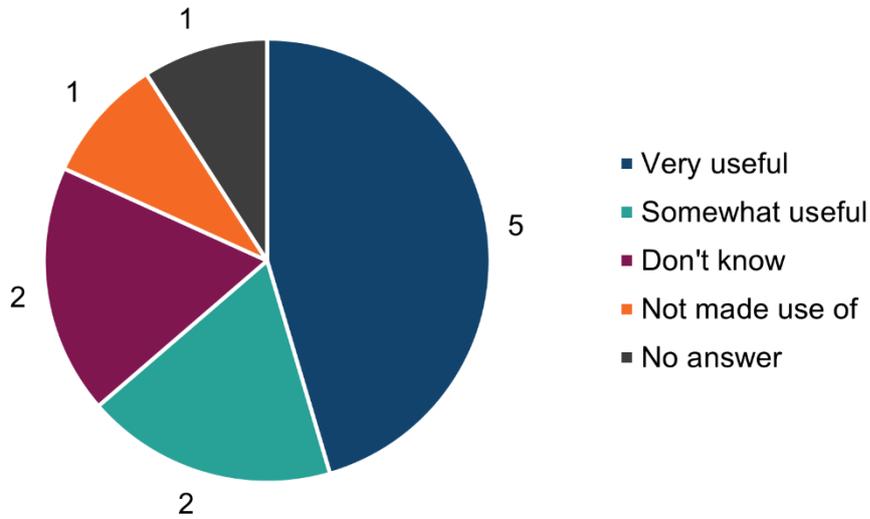
- Building Awareness
- Inspiring Action
- Sharing Resources
- Digital CIT Working Online

The last section covers a number of online tools/checklists that Charters can access online, use and adapt to their own requirements (via interactive password protected part of the CIT for Charters only). These are:

- Digital CIT FORM1_Users Continuing PROFESSIONAL Development
- Digital CIT FORM2 _Diversity Charters VISIBILITY ONLINE
- Digital CIT FORM3_Diversity Charters FEATURED Signatories
- Digital CIT FORM4_Signatory ACTIVITY OVERVIEW
- Digital CIT FORM5_Signatory PERCEPTIONS and CLIMATE
- Digital CIT FORM6_Signatory SCOPING an ACTION PLAN
- Digital CIT FORM7_Signatory DEMONSTRATING IMPACT and VALUE
- D&I Presenting the BENEFITS

During the survey, Charters were asked to provide their views on how useful they felt the Charter Implementation Kit was. In total, 10 Charters responded, with results shown in Figure 12 below. As can be seen from the graph, 7 of the 10 who answered the question said that it was either useful or very useful and no one considered the toolkit as not useful.

Figure 12 - Usefulness of Charter Implementation Tool



Source: D&I survey. N=11. Single answer question.

6.6.2. EU Diversity Self-assessment tool

The EU Diversity Self-assessment tool is targeted at both public and private sector employers, irrespective of size. It sets out to assist organisations in assessing where they currently stand with respect to D&I and covers a broad range of areas as follows:

Table 8 – Areas of the Diversity Self-Assessment Tool

Areas	Content
Organisational Diversity Infrastructure	<ul style="list-style-type: none"> • Diversity management policy • Discrimination grounds covered • Allocation of responsibilities for diversity management • Provision of training and capacity building for staff working on diversity • Degree of monitoring workplace diversity and inequalities • Structures and systems for dialogue with staff from groups covered by discrimination grounds • Mechanisms and procedures for complaints • Addressing inclusive language in communications materials • Signatory or non-signatory to national Diversity Charter
Career Progression	<ul style="list-style-type: none"> • Extent to which career progression processes advance diversity and prevent discrimination • Discrimination grounds covered in career progression processes
Terms and Conditions	<ul style="list-style-type: none"> • Monitoring of gender pay gap and policies to ensure equal pay • Monitoring pay differentials for groups covered by other discrimination grounds and steps taken to address

Recognition for Specific Needs	<ul style="list-style-type: none"> • Steps to enable reconciliation of work and family life/provision of flexible working arrangements • Steps to recognise/accommodate cultural, religious, and language specificities • Steps to recognise and provide for spouses/partners of staff members in same-sex couples in the same manner as those in heterosexual couples • Steps to recognise, respect, and support transgender (trans) staff members in the workplace • Steps to ensure accessibility of the workplace for all groups of people with disabilities • Steps to enable and encourage the retention of older staff members
Recruitment	<ul style="list-style-type: none"> • Procedures acting to advance diversity and prevent discrimination • Discrimination grounds addressed in recruitment procedures

The tool was initially developed by the European Commission with support from a D&I expert and has subsequently been made available on the EU website. No data has been identified on how widely the tool has been utilised by organisations across the EU or on the benefits it has provided. An interview with one Charter did however identify that, whilst they considered the tool rather limited in scope and basic in some respects, they have subsequently developed their own more comprehensive tool, covering management basics, programmes and activities, building commitment and results/outcome indicators²³³. However, it is noted that the purposes of these tools may differ, with the EU Self-assessment Tool being primarily an internal tool for organisations to assess where they are currently in the D&I practices and policies and has 21 questions, whereas the latter is intended for education and internal monitoring, and comprises 80 questions.

6.6.3. Newsletters

Regular newsletters are published (usually 3-4 times annually) covering matters in the D&I field as well as providing updates on news and work of the Charters across the EU. Back copies of the newsletter are published for public access on the European Commission's website.²³⁴

Charter respondents to the survey generally found the newsletters useful, with 9 of 11 respondents finding them useful or very useful.

6.6.4. Hosting of regular Charters' meetings

These meetings are typically held quarterly online and at least once per year in-person in Brussels, providing Charters with the opportunity to meet together, share experience, information and tools and hold discussions on progressing their work with signatories across the EU. Feedback from Charters during interviews in relation to these meetings was overwhelmingly positive, with details provided in Section 6.6.7 below.

²³³ ECH2 INT.

²³⁴ Back copies to 2018 are available at [JUSTICE AND CONSUMERS - Newsletter Archives](#)

6.6.5. European Capitals of Inclusion and Diversity Award

This initiative from the EU provides an opportunity for local authorities to showcase work being done to create more diverse and inclusive spaces for their citizens. The focus is putting diversity and inclusion into practice and providing tangible deliverables. Initiatives covering the following grounds of discrimination and their intersectionality were eligible for the 2024 Award:

- Sex
- Racial or ethnic origin
- Religion or belief
- Disability
- Age
- LGBTIQ identity

No information pertaining to the benefits arising from the European Capitals of Inclusion and Diversity Award has been identified during the study, although it is noted that this initiative was not the focus of this study.

6.6.6. European Diversity Month

The European Diversity Month, which along with the European Capitals of Inclusion and Diversity Award represent key initiatives of the Commission, sets out to “celebrate and promote the power of differences in shaping a modern and forward-thinking workplace where curiosity, fluidity and acceptance thrive and elevate the sharing of knowledge.”²³⁵ Organisations are encouraged each May to organise and take part in activities promoting and celebrating D&I across the EU to share these internally and with others via workshops, social media etc. European Diversity Day in 2024 was the fifth such initiative promoted by the European Commission.

In total, 275 activities taking place across the EU throughout 2024 were listed on the European Commission website. They covered a very broad range of activities including (but not limited to) quizzes, workshops and webinars, specific D&I courses, panel discussions, conferences, written articles, meetings between Charters and signatory organisations etc.

The study team have not been able to identify information regarding participation and outcomes of these different activities, but the number of events organised suggests that a range of organisations were keen on participating in the initiative.

Box 19 provides a case study example of developing and promoting LGBTIQ equality (see also Annex A).

Box 19 – The COFIDES Pride Awards focusing on LGBTIQ equality

The *COFIDES Pride Awards* celebrate individuals and teams who have advanced diversity and inclusion within the organisation, particularly in developing, promoting or championing LGBTIQ equality. This initiative forms part of COFIDES’ *broader Equality Plan and Diversity Strategy*, guided by national, European, and international legislation. Introduced in 2022, the awards have resulted in increased visibility for LGBTIQ employees and allies, enhanced workplace morale, and strengthened COFIDES’ reputation as a national and international leader in inclusivity. Through a combination of

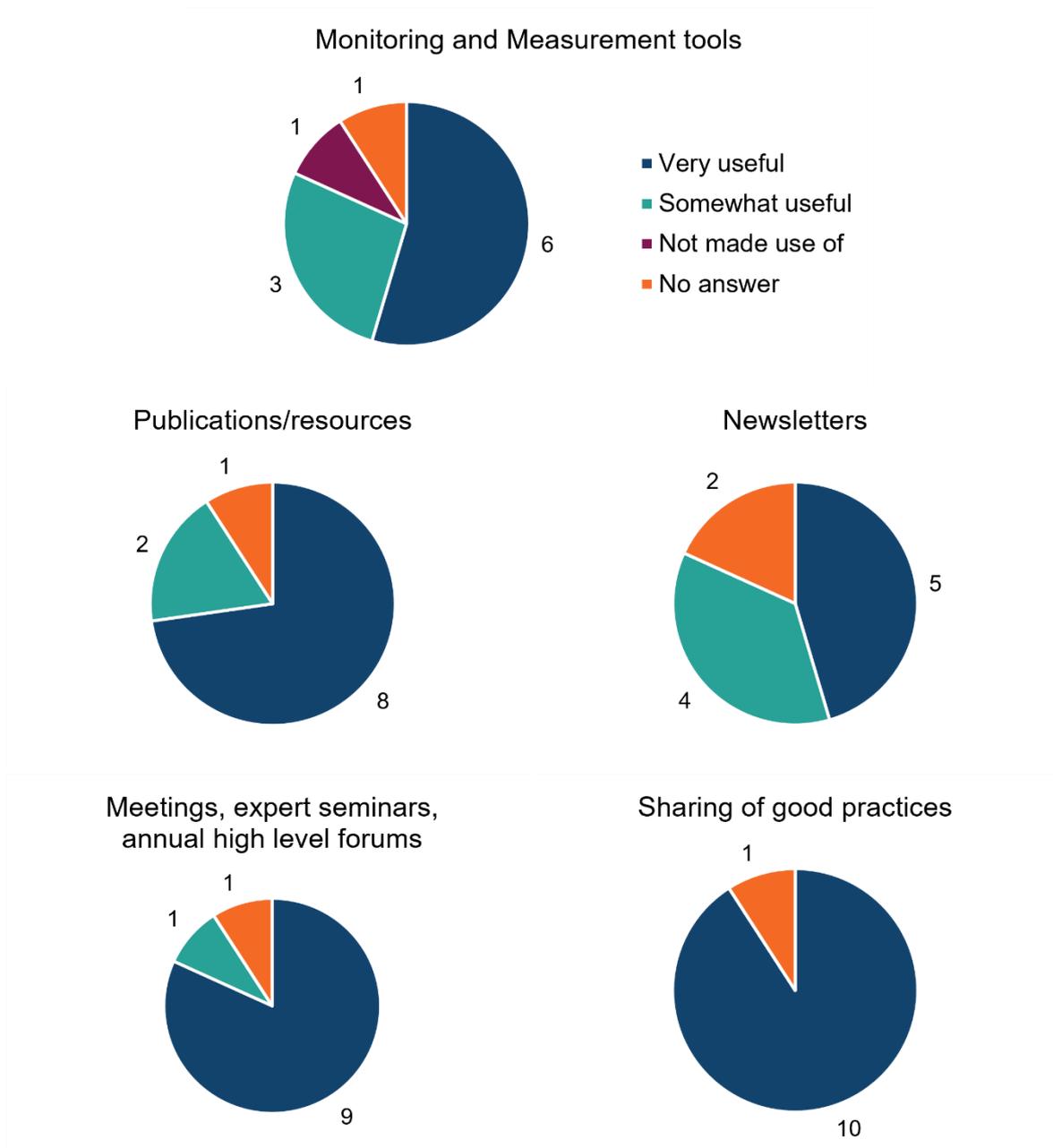
²³⁵ European Diversity Month 2024.

formal recognition and engaging celebratory events, the awards demonstrate the COFIDES' commitment to embedding diversity as a core value in its culture and operations.

6.6.7. Overall feedback on the EU Platform of Diversity Charters

The survey asked a specific question around the usefulness of different aspects of the EU Platform. In total, 11 respondents from Charters provided a response to the questionnaire and responses to this question are provided in Figure 13 below.

Figure 13 - Usefulness of EU Platform



Source: D&I survey. N=11. Single answer questions.

The figure shows that sharing of good practices was rated as very useful by all Charter respondents answering this question, closely followed by meetings, expert seminars and

annual high-level forums (9 rating as very useful) and then Monitoring and Measurement tools (6 rating as very useful). One other Charter respondent identified learning (e.g. peer-to-peer, sharing of good practices and/or challenges), saying that that the Platform is very good for information about policies and also provides access to tender resources although they had not yet taken advantage of this because they felt that the tendering process is burdensome, requiring a significant amount administrative input. Half of the respondents to the survey questions regarding the usefulness of Newsletters and the Charter Implementation Toolkit rated them as “very useful”, although this proportion was lower than for other tools. Overall, survey respondents provided positive view on the usefulness of the EU Platform of Diversity Charters and its tools with no respondents indicating that any of the above elements were not useful.

Additional support from the EU Platform of Diversity Charters identified by survey respondents included training in unconscious bias, support for starting up the Charter at Member State level, representation of the European Commission at Charter meetings/events, co-funding of national Charters’ events during the EU Diversity Month, annual face-to-face meetings and acting as a catalyst for making connections and cooperation with other Diversity Charters.

During interviews with organisations running Charters, a Charter in the Western Europe region indicated that they considered the EU Platform of Diversity Charters a valuable knowledge-hub and that seeing how other Charters approached different challenges was inspiring to others. They particularly appreciated the role of the Platform in facilitating exchanges between Charters and organising regular meetings. They did indicate however that due to limited resources, they were not able to be as active in the EU network as they would like, but indicated they would endeavour to be more so in the future.

A second Charter from Western Europe also indicated that the quarterly meetings with other Charters were a good opportunity to share knowledge, gain insight into how others approach D&I topics and specific challenges, learn from each other and hear about good practices. They suggested that the Platform continues exchanging knowledge and experience but could play a stronger role by providing more systematic data e.g. about signatories in the different Member States and analysing and using this to strengthen the national network elsewhere. This could also potentially stimulate larger companies to sign the Charter across all their operations in different EU Member States. They felt that they were unable to approach the Platform with policy questions and gave an example about sectoral approaches or reaching large groups of employers due to limited internal capacity²³⁶. They also felt that the EU Platform itself should grow with the expansion of the network and that it was crucial to have a good communications strategy. Growing the network might be achieved through potentially admitting EU-level networks, industry associations, business organisations etc. to the Platform and using these networks and organisations to promote the Platform among their members, the majority of which are not signatories.

A Charter from Eastern Europe region indicated that they took part in multiple activities of the Platform and appreciated activities such as the training course run by the Platform on “unconscious bias”. They appreciated the exchange of information on how Charters are implemented in other Member States but wanted more of such activities, including study visits. They further noted that the Platform offers small grants of €3000 for activities at the EU Diversity Month but felt that this was rather limited. The Charter also indicated that as Charter membership increases over time, it would be important to specify particular activities that should be handled in a consistent way across Charters, for example notifications of violation of employment law and protection for whistleblowers, as well as discriminatory practices in the workplace, etc.

²³⁶ Members of the Platform might be able to ask questions, but do not always receive a response.

6.7. Conclusions on the impact of Diversity Charters and the EU Platform

Diversity Charters are now present in all 27 EU Member states, with membership rising since the establishment of the EU Platform of Diversity Charters in 2010 and standing at almost 17,500 signatories at the start of 2024, covering more than 17 million employees. As indicated in the previous sections, national Diversity Charters vary significantly in the areas of D&I that they cover, in their size of membership, their structure and funding and in the services they provide. National and local contexts play a significant role in these differences, and organisations also vary widely in the stage that they are at in their D&I journey.

However, despite these variations (a finding in itself), a number of overall conclusions can be drawn based on the findings of the previous sections, and these are set out in Box 20.

Box 20 - Key conclusions

Key thematic areas of D&I covered across the majority of Charters include gender/sex, disability/ability, sexual orientation racial or ethnic origin, and religion/faith. However, given that organisations vary significantly in terms of where they are at in their D&I journey, it is important that Charters offer as wide a range of services covering as many D&I areas as possible in order to encourage great levels of membership. This is important not just in terms of providing advice and support required by organisations on individual thematic areas, but also to address the intersectional nature of discrimination and exclusion.

Motivations for organisations to sign up to Charters include societal benefits and accessing support to designing and implementing D&I policies. This support needs to be tailored to individual organisations to the degree possible. Non-signatories often do not see a current need or are planning to join in the future, so promoting the benefits of implementing D&I policies as widely as possible (e.g. at events, through trade and business associations at their events) may be beneficial in attracting these organisations.

Signatories have taken a range of actions in furthering D&I within their organisations, including self-diagnosis to assess D&I status, participating in D&I events and campaigns, staff attendance at training course and seminars, and developing and introducing specific D&I policies and actions (including monitoring of progress) across the organisation.

These actions have secured benefits for these organisations which include: positive impact on organisational culture, reputational benefits, improved staff retention/recruitment and wellbeing, and innovation within organisations.

Involving leadership from organisations in the design and implementation of D&I policies and strategies is considered the most important factor in facilitating progress. However, a number of barriers and challenges persist, including ingrained cultural biases, resistance to change/lack of motivation within organisations, and measuring progress/impacts of measures undertaken. Limited resources (human and financial) at organisation and Charter level are a significant constraint.

Overall feedback from the stakeholder was that the EU Platform provided useful information and that the regular meetings were beneficial, providing the opportunity to exchange information and learn from the experiences of others as well as access to specific training/learning opportunities.

7. Recommendations based on main data and key findings of this study

Recommendations for organisations/businesses

Formation of D&I policies

- **Secure a strong mandate and active commitment and participation from senior leadership and board members.** Ensure their engagement in collaboration with employee groups to align on shared priorities. Organise and involve senior leaders in events and awards to recognise and motivate them for their D&I efforts. Ensure their rhetoric is matched with tangible actions, such as the allocation of resources and the integration of D&I into organisational strategy and policy.
- **Develop a compelling business case** to motivate your organisation to adopt or enhance a D&I policy highlighting the benefits and opportunities it offers.
- **Develop, implement and actively manage a D&I policy.** Recognise that the benefits of D&I do not materialise automatically but require deliberate planning, execution and oversight.
- **Making a start is key.** Understand that achieving perfection from Day 1 may not be achieved (and is not necessary). Policies can and should be reviewed, updated and revised over time to ensure continuous improvement.
- For both beginners and established organisations in D&I, **collect diversity data anonymously** to identify areas of underrepresentation, set meaningful goals and targets, and develop actionable and tangible strategies.

Business case for D&I

- **Develop a business case for D&I that is tailored and aligns with your organisation's specific needs and context.** Consider seeking expert guidance and support to conduct a comprehensive audit or review of your current D&I policies and practices. While you can draw inspiration from our report, adapt the business case to suit your sector as certain arguments may resonate more strongly in some industries than in others, thus recognising that effective approaches vary across industries, sectors and organisations of different sizes. For example, as shown in Section 5.4, customer-facing sectors with significant interaction with the general public should consider potential benefits of customer interaction and labour-intensive sectors need to consider the potential benefits from easier staff recruitment and retention.
- **Start with the ethical and fairness rationale for D&I but complement it with economic arguments.** Financial benefits can be persuasive, though they should not overshadow the primary motivation of fostering inclusivity. In fact, there are risks associated with approaches that frame the business case in purely or predominantly economic terms, highlighting the importance of fairness and equity arguments (see Section 5.4.8).
- **Craft a comprehensive and multi-dimensional business case to maximise its persuasiveness.** While focusing on one key aspect can serve as an initial 'door-

opener', ensure that the business case covers a broad spectrum of D&I benefits, including ethical, social and economic dimensions. Use a mix of quantitative and qualitative data, indicators and real-world examples to effectively demonstrate the impact and value of D&I initiatives. As shown in Section 5.2, in order to fully capture the breadth of the positive impacts from D&I, the business case needs to be multi-dimensional.

- **A comprehensive business case should cover the following eight aspects: recruitment and retention; performance; innovation and creativity; problem solving and decision making; reputation of the organisation; customer satisfaction; organisational culture and team interaction; fairness, equality, and well-being.** Each of the eight aspects is assessed in more detail in Section 5.4.
- **Use data and case studies to highlight the tangible benefits and positive impacts of D&I initiatives within your organisation.** Refer to our report for well-researched arguments and insights, using them to persuade stakeholders and build a compelling case for the adoption and support of D&I policies.
- **Leverage** the Corporate Sustainability Reporting Directive (**CSRD**), the European Sustainability Reporting Standards (**ESRS**), and the Corporate Sustainability Due Diligence Directive (CSDDD) (and other legislation in Annex B) to embed D&I as a fundamental aspect of your organisation's due diligence, governance, double materiality assessment and stakeholder engagement. Similarly, prepare for the European Directive "**Empowering Consumers for the Green Transition**" (2024/825) as an opportunity to attract consumers by highlighting the social attributes of your products.
- **D&I efforts should extend beyond headquarters** and instead be integrated across all business units and throughout the entire value chain. This holistic approach ensures that D&I efforts create a meaningful and lasting impact by embedding inclusive practices at every level of the organisation and across all operational areas.
- **Emphasise that 'absence of conscious discrimination' is insufficient when addressing D&I.** While antidiscrimination laws and other regulatory measures provide a baseline of protection, they fail to fully address subtler and systemic forms of exclusion, such as unconscious biases, microaggressions and structural barriers that perpetuate inequality and hinder genuine inclusion. Tackling these nuanced challenges requires proactive strategies and a commitment to fostering cultural transformations within organisations and society.
- **Acknowledge the increasing diversity in the global workforce, which profoundly impacts business dynamics.** Embracing D&I is essential for attracting top talent, particularly in a global recruitment context, as job seekers increasingly prioritise organisations that demonstrate inclusivity and equity in their practices (see Section 5.4.1.1).

Content of D&I policies

- **Ensure that your policy covers both diversity AND inclusion**, recognising that inclusion is essential for unlocking the full potential and leveraging the benefits of diversity (see Section 5.2). Workers need to feel welcomed and valued not only during the onboarding process but throughout their tenure with the organisation to foster genuine engagement and belonging (also see Section 5.2).

- **Ensure that your D&I policy covers all relevant diversity dimensions**, avoiding a narrow focus on only one or two areas. A holistic approach demonstrates genuine commitment and avoids perceptions of ‘tokenism’, ‘green washing’ or ‘diversity fatigue’. Overlooking certain diversity dimensions weakens the effectiveness of the policy and risks diminishing trust among stakeholders. As noted in Section 5.5.1, focus on a limited number of diversity dimensions is a weakness of some existing D&I programmes.
- **Use role models, champions and case studies to inspire others**. A role model will demonstrate that your company has successfully implemented positive change. A success story can inspire and motivate other companies and departments to adopt D&I policies. Consider assigning one of your managers to undertake a secondment within your industry association, federation or chamber of commerce. Draw on the case study examples highlighted in our report for further inspiration.
- **Actively involve allies in D&I initiatives**, such as through employee-led networks as they can amplify positive change and foster a culture of inclusivity. Allies play a crucial role in advocating for underrepresented groups, building momentum for D&I efforts, and creating a supportive environment across the organisation.
- **Eliminate biases from recruitment and promotion processes**. Simplify job advertisements, use gender-neutral language, and conduct structured job interviews to ensure clarity and inclusivity. For promotions, establish diverse committees, apply objective criteria wherever possible, and use structured questions. If using AI or other algorithm-based tools, remain vigilant about the risk of biases and take steps to mitigate them to ensure fairness, equality and equity across organisational processes. Eliminating biases from recruitment and promotion can lead to significant benefits for organisations, as shown in Section 5.4.1.
- **Regularly measure progress in D&I initiatives and benchmark your performance against industry peers to drive continuous improvement**. Benchmarking not only highlights areas for growth but also fosters a competitive spirit that motivates organisations and their leaders to take bold actions and strive for excellence. By comparing your organisation's performance with others, you can identify best practices, set ambitious yet achievable goals, and demonstrate leadership in advancing D&I within your industry.
- **Provide comprehensive training** to leaders and other staff members responsible for the implementation of D&I policies to equip them with the knowledge, skills, and tools needed to create an inclusive workplace culture. The training should be carefully tailored to suit the needs of various learner groups, including leaders, C-Suite executives, board members, managers, supervisors etc to ensure its relevance and effectiveness for each audience.

Success factors

- **Acknowledge that building a truly diverse and inclusive organisation is a complex and ongoing process that requires a holistic D&I approach and long-term commitment**. Address the challenge that many D&I programmes face in achieving maturity (see Section 5.5.1) by recognising that implementation is a process involving multiple interconnected steps that can reinforce one another over time. Strive for continuous improvement by learning from best practices, industry standards, and the experiences of others to ensure that your D&I policies create lasting and meaningful impacts.

- Ensure that **resources are firmly in place** to support D&I initiatives, as insufficient investment can hinder the realisation of expected benefits. Resources should be comprehensive and encompass human resources (leadership, champions, and a dedicated D&I team), financial resources (a budget for specific long-term policies and a separate budget for specific initiatives), and information and communication channels (internal and external communications, stakeholder engagement plans, and feedback mechanisms). Additionally, provide support measures such as IT, tools, infrastructure, relevant data and indicators, robust reporting systems. Training and development programmes are essential, alongside sufficient time and planning resources to allow for effective implementation, ongoing monitoring, and evaluation framework.
- **Focus on implementing robust structures rather than relying on isolated actions.** Single actions often fail to create lasting change, whereas well-designed, long-term frameworks provide the foundation for sustained progress. Prioritising structural solutions over short-term projects ensures that D&I efforts are deeply embedded within organisational practices and this, in turn, leads to more consistent and meaningful results.
- **Integrating top-down and bottom-up strategies enhances the likelihood of success in D&I initiatives.** A top-down approach ensures strong leadership commitment, clear policies, and resource allocation, while a bottom-up strategy encourages employee engagement, grassroots innovation, and widespread ownership of D&I goals across all levels of the organisation. Combining these approaches creates a comprehensive and inclusive framework that supports sustainable and impactful outcomes.
- **Embed a D&I culture within your organisation.** Cultivating an inclusive culture fosters an environment where D&I becomes a core value, reinforcing positive behaviours and creating a foundation for sustained progress. A well-established D&I culture reinforces positive change, ensures that initiatives are not seen as standalone efforts but as integral to the organisation's identity and long-term success.

External communication

- **Communicate externally that your organisation is D&I friendly by showcasing it prominently in job advertisements and other outreach materials.** Highlighting your diversity policies can significantly enhance your organisation's attractiveness to job seekers, broadening the applicant pool and improving retention rates (as shown in 5.4.1). By fostering an environment where individuals are treated equitably and fairly, your organisation becomes more attractive to potential job seekers and employees, and reduces staff turnover (see Section 5.4.1.1 and 5.4.1.2). Prospective candidates highly value diversity and are more inclined to consider employment with companies that visibly demonstrate a commitment to D&I (see Section 5.4.1.1).
- **Ensure that external communication about your D&I initiatives is tactful and carefully tailored to the specific needs and experiences of different diversity dimensions.** Thoughtfully crafted diversity statements can help avoid unintentionally fostering feelings of inferiority or exclusion among certain groups.
- **While building your communication around the business case for D&I can highlight organisational benefits, it carries the risk of deterring candidates if the messaging appears driven solely by self-interest.** Review the need for a multi-dimensional business case that centres on fairness and equity arguments in

Section 5.2. Balance your messaging to emphasise genuine commitment to equity, fairness and inclusion to ensure that all candidates feel valued and respected.

Recommendations for the Diversity Charters

Coverage, outreach and targeting

- **Become champions on voluntary disclosure.** Encourage enterprises and their employees to participate in surveys and other activities that will allow the collection of relevant information on diversity and inclusion and publish the results, providing benchmarks for companies to compare their performance against peers
- **Promote Charter work and extend membership.** Actively promote your work and encourage membership from underrepresented organisation types, sizes and locations. Address challenges, such as cost barriers for smaller organisations by considering a tiered signatory structure based on the size of the organisation.
- **Collaborate and learn from other Charters.** Charters will benefit from networking with other Charters to learn from each other on the best ways in which to support signatories. Keeping up to date with best practices via networking and exchanging experiences is encouraged and then passing on that best practice to others. The EU Platform of Diversity Charters provides a good networking opportunity, so active participation is encouraged.
- **Engage leadership groups within organisations.** Charters should target leadership teams in their engagement with organisations. Feedback from some Charters is that engagement with leadership teams in organisations is critical in getting buy-in to delivering on D&I.
- **Mutualise and aggregate intelligence** on D&I awareness, capacity building, methodologies, data, tools and best practice together with Sustainability/CSR Networks which work closely with Chief Sustainability Officers (or equivalent) and whose task is to balance risk management and value creation with Boards and other functions within the organisation and across the value chain. Among them, new insights can be obtained on underserved diversity dimensions requiring specific needs of e.g. young people not in education, employment or training (NEET), carers, gender balanced violence.
- **To accelerate the D&I movement and reach impact, collaborate with federations and associations to expand and deepen support.** Charters will benefit from collaborative working with federations and associations in addition to their members. Sectoral differences require different approaches, focus and Charters can benefit from the in-depth sectoral knowledge these bodies can provide, as well providing the opportunity to engage with their members more widely. This can be through a range of initiatives, including participation in events and engaging in D&I promotional and introductory sessions etc.

Provision of tools and supports

- **Offer diverse support.** Organisations are moving at different paces, at different stages in their D&I journey, advanced in some areas but only beginning in others and requiring different types of support. Charters will be able to benefit a wider range of signatories if they are able to offer support and information on the widest range of D&I topics, policies and tools. Small and medium-sized organisations face unique challenges and need more/bespoke support in adopting D&I policies and practices.
- **Develop digital tools.** With the emergence of AI and extensive digitalisation, consider developing new or utilising existing employer resources addressing technological advancement. For example, the prospective use of AI in recruitment

and screening processes is an area with some concerns for D&I and could become prevalent in the future. See the *Manifesto for Responsible & Sustainable AI*²³⁷

- **Tailor services to the needs of signatories.** Tailor services to the specific needs and contextual situations in which the signatory organisations operate. Context and situation are very important aspects in relation to an organisations' ability to introduce, implement and embed D&I policies and strategies. Provision of support and advice tailor-made to the specific needs of signatories is highlighted as an important aspect of Charters' work, by both Charters and signatory organisations.
- **Support organisations to monitor progress of D&I implementation and embedment in the signatory organisations.** Assistance with self-monitoring on progress of signatories on their D&I journeys should be an integral part of support provided. It provides both an incentive to signatory organisations to move forwards with the development of policies and their implementation, as well as a means to develop co-operative relationships, provide impetus to make progress beyond an initial commitment, learn lessons around what works and what doesn't and work towards a long-term goal with sustained D&I practices.
- **Offer and expand networking opportunities and exchange of good practices.** Networking events and knowledge sharing platforms (including on best practice) are widely considered to be important and effective tools in promoting, developing and delivering on D&I initiatives. Providing guidance and advice about quality design, implementation and embedment of D&I policies and practices is key. Charters are encouraged to support and extend these kinds of initiatives as much as possible going forward.
- **Provide high quality legal support where appropriate.** Organisations are required to comply with any legal requirements regarding D&I in the Member States where they operate. Where Charters can provide specific supports in this area, it not only makes use of an "open door" but also creates an entry point to deepen the wider D&I support that can be provided.
- **Enhance resources for Diversity Charters.** To effectively implement their mandates, Diversity Charters require robust resources (including financial) to develop and execute comprehensive action plans that support EU-level activities and effective advocacy at the Member State level. Additionally, adequate funding and support will empower Charters to lead collective efforts in building awareness, fostering meaningful dialogue, and implementing communication strategies that resonate across diverse stakeholder groups. By investing in these areas, Charters can strengthen their impact, facilitate alignment with EU objectives, and ensure sustained progress in advancing inclusive practices throughout Europe.

Recommendations for the European Commission

Regulatory, legal and policy provisions

- **Strengthen the implementation of existing legislation and policy frameworks, and links between D&I initiatives,** including non-discrimination and equality laws, to uphold provisions and commitments at the EU level and send a strong signal to Member States. Promote legislation that eliminates structural barriers, combats discrimination and fosters equality.
- **Evaluate whether existing provisions comprehensively and effectively address all relevant diversity dimensions,** and **address** remaining legal and policy **gaps** to ensure all dimensions are adequately covered. Integrate D&I assessment into the evaluation of regulations, laws and policies.

²³⁷ Manifesto for Responsible & Sustainable AI, Forética, available at https://foretica.org/wp-content/uploads/2024/06/Manifesto_for_Responsible_and_Sustainable_AI.pdf

- **Adopt a coordinated, cross-Commission approach** to regulatory and policy frameworks, fostering collaboration **across** various Directorate-Generals of the European Commission and agencies, e.g. DG EMPL, DG JUST and DG GROW (policies on inclusive up-skilling, just transition, sector skills blueprints, draft EU Anti-Poverty Strategy), DG RTD (Industry 5.0), DG FISMA (sustainable finance, transparency, taxonomy), EISMEA (support for SMEs requiring tailored assistance in developing, implementing and embedding D&I policies and practices).
- **Maintain D&I as a priority on the political and policy agenda and** emphasise its significance **in dialogues with Member States**. Ensure a high level of commitment to and implementation of D&I policies and practices within the EU institutions. Advocate for and champion a commitment to social and cultural changes.
- **Mandate monitoring and measurement of progress, and compliance with legal requirements** to advance equal opportunities and eliminate discrimination. **Leverage on relevant legal and policy requirements**, such as the Sustainable Development Goals (SDGs), the CSRD, the ESRS, the Corporate Sustainability Due Diligence Directive (CSDDD), The Green Claims Directive and the Directive on “Empowering Consumers for the Green Transition” **to outline uniform requirements for monitoring and reporting**. This should include outlining the organisations to which the reporting mandate would apply. Before extending such mandates, evaluate the effectiveness and impact of current reporting mechanisms, identifying best practices and areas for improvement. Putting these initiatives and requirements in place and enforcing them provides direct impetus for organisations to develop and introduce D&I policies, strategies and reporting systems (see Section 6.3.2 and Annex B). **Aggregate information and data and encourage stakeholders** (governments and organisations) **to prioritise D&I in fulfilling reporting requirements** to improve and accelerate D&I strategic practice.
- **Assess the impact of digitalisation and technological advancements**, including the use of AI and algorithmic management in recruitment and screening processes, **identifying their implications for D&I**. Assess the likely prevalence and impact of these technologies in the future, and determine how regulatory and policy frameworks should adapt to address emerging challenges and opportunities. In the context of the EU AI Act, consider establishing an EU-level policy and practice focused Leaders Group to ensure the integration of AI within D&I strategies and the incorporation of D&I principles into AI applications to strengthen ethical and inclusive technological advancements.

Strengthen the knowledge base

- **Understand and disseminate evidence on the importance and benefits of diversity**, including the advantages of social inclusion and cohesion, the costs of discrimination and social exclusion, and the impact on global competitiveness.
- **Communicate the multidimensional aspects of a D&I business case**, emphasising both ethical/fairness and economic/financial benefits. Highlight the necessity of inclusion to realise the benefits of diversity.
- **Develop, compile and share a comprehensive repository of D&I resources and training materials covering all diversity dimensions** to demonstrate the tangible benefits and impacts of D&I, and to inspire and drive change. Collaborate with the Diversity Charters, signatories and wider organisations to develop materials **on how to embed D&I into policymaking and practice** at EU, national, regional and local levels. Ensure sufficient and adequate resources, including financial support, are allocated for creating a robust knowledge base (including training materials, guides, toolkits, studies, data, reviews, case studies, good practices, surveys etc.) to support these efforts efficiently.
- **Consider developing a one-stop portal for D&I resources**. A centralised portal would enhance stakeholder access (Charters, businesses, wider organisations) to high-quality information, best practices and tools for implementing and advancing D&I initiatives effectively.

- Consider establishing a continuous Practice Check to evaluate and refine D&I initiatives. Consider introducing a D&I Consumer Voice Process involving consumer organisations to regularly gather and address practitioners' concerns to ensure that feedback is integrated into policy and practice. Explore and test alternative engagement models that position D&I as a key driver of business innovation and competitiveness.

Capacity building: support, tools and good practice examples

- **Tailor services and tools** (including digital solutions) **to meet the needs and contextual circumstances** of Diversity Charters and broader **stakeholders**. Recognising the specific contexts in which stakeholders operate is crucial, as this influences their ability to introduce, implement and embed D&I policies, strategies and practices.
- **Encourage and support stakeholders to embed monitoring, evaluation and learning (MEL) to assess progress in D&I implementation** and provide opportunities for them to share experiences and lessons learnt from using MEL tools. **Share examples of effective MEL tools.**
- **Establish a digital platform** for continuous collaboration and to enhance communication between Charters on a permanent ongoing basis rather than just having the periodic meetings. This platform could integrate with the proposed one-stop portal for D&I resources to provide a seamless hub for sharing insights, best practices and updates in real time.
- **Provide support to organisations to ensure both commitment and resources are in place** to support D&I efforts. Resources should include: human resources (leadership support, champions, dedicated team), financial resources (budgets for specific long-term policies, dedicated budget for specific initiatives), information and communication (internal and external communication channels, stakeholder engagement plan, feedback mechanisms), support measures (IT infrastructure, tools, data, indicators, reporting frameworks), training and development programme, and time and planning resources (dedicated time for implementation, monitoring and evaluation frameworks).

Strengthen stakeholder engagement, outreach and dissemination

- **Adopt a more comprehensive approach to stakeholder engagement by involving allies.** Expand and broaden the EU Platform of Diversity Charters stakeholders' base by building partnerships with wider EU-level networks, federations, associations, Member State authorities, employers, thematic experts, CSR networks, and other relevant stakeholders. Leverage their in-depth sectoral and thematic knowledge and expertise and explore opportunities to engage with their members more broadly. **Consider establishing extended European sector alliances on D&I** to strengthen collaboration and build ecosystems that foster innovation and enhance talent access and retention. By working together, stakeholders can better coordinate efforts to upskill and upscale D&I initiatives, positioning them as a key driver to transform businesses and to create value.
- **Raise awareness of evidence highlighting the importance of D&I.**
- **Continue collaborating through** diverse activities and initiatives, such as **joint events, networking, mutual learning, sharing materials and exchanging good practices.**
- **Promote the work of Charters and support the expansion of their membership.** Assist Charters in promotional activities, sharing materials, and actively seeking memberships from a variety of organisations.
- **Engage with Member State authorities** to advance implementation of D&I policies and practices in collaboration with national Charters. Inspire and encourage Member States to undertake activities exceeding the minimum legal requirements.

- **Actively promote the EU Platform of Diversity Charters and maintain and enhance its website.** Ensure that the website remains up-to-date and an accessible hub for resources, news and updates. Develop and implement a comprehensive communication strategy to raise awareness of the Platform using diverse communication channels, such as social media, newsletter, webinars and events to highlight the Platform's initiatives, achievements and opportunities for engagement. Foster partnerships with key stakeholders to amplify its reach and visibility.

Provision of financial support

- **Review existing funding models** (e.g. existing funding programmes) to identify how they can better support stakeholders at the national level in implementing and monitoring D&I policies and practices, including support for networking events and knowledge sharing platforms.
- **Revise and strengthen funding conditionalities** to further incentivise Diversity Charters to adopt more collaborative approaches, foster partnerships and develop and use shared tools. This could include linking funding to measurable outcomes in collaboration and tool utilisation across Charters. Additionally, consider providing increased financial support to the EU Platform of Diversity Charters to expand its capacity and enable more impactful initiatives. Allocate dedicated funding to national Charters to enhance activities, allowing them to implement innovating D&I programmes and address region-specific challenges.
- **Evaluate the need for additional funding streams** to address future demands and opportunities.

8. Annex A: Full narratives of the case studies

ID	Practice name	Country
1	Inclusiecollectief Ambassadeurs (Inclusive Collective Ambassadors) - HVO-Querido	The Netherlands
2	Fair pay and inclusive employee benefits	Greece
3	Avoin tiedolle -yhdenvertaisuuskampan (Open to Knowledge campaign) - Akava -	Finland
4	LavoriamoCi & Soci Caffè (Let's Work on It & Members Cafe) – Impronta Etica	Italy
5	Activities promoting talent and excellence and equitable gender culture - EnterprisInGirls	Italy
6	Diversity IN Check - Forum Odpowiedzialnego Biznesu	Poland
7	Premios Orgullo COFIDES LGTBIQ (COFIDES Pride Introduction) – COFIDES	Spain
8	Diversity and Inclusion Workplace Awards Programme	Romania and Slovakia
9	Diversiteit in Bedrijf (Diversity in Business) - SER	The Netherlands
10	Diversity and inclusion framework of a large financial company	France
11	Dissemination of good practices through different channels - Fundación Diversidad	Spain
12	Business Uniting Talents 2030 - Prince Philippe Fund/ AXA Insurance	Belgium
13	D&I in a global organisation – Oracle	Greece
14	Diversxs con sello propio (Diversity with their own stamp) - Correos	Spain
15	The sponsorship programme – Toyota Motor Europe	Belgium / EU

16	Employee Resource Groups	Poland
17	Elevate Pledge – Business in the Community Ireland	Ireland
18	Exchange and transfer of practices within a large international financial corporation (Diversity & Inclusion Corporate Group Framework)	France and Poland
19	Interregionaler Gewerkschaftsrat Bodensee (Interregional Trade Union Council Lake Constance)	Germany – border region
20	Inclusive Communication – IMS Luxembourg	Luxembourg

8.1. *Inclusiecollectief Ambassadeurs*²³⁸ (Inclusive Collective Ambassadors) – HVO-Querido

8.1.1. Introduction

The *Inclusiecollectief Ambassadeurs* initiative, implemented by HVO-Querido, uses **storytelling and representation** to foster diversity and inclusion (D&I) within the organisation, as well as to spread awareness of D&I topics at external events. Originating as an informal workshop in 2022, it evolved into a **formalised platform** where ambassadors are able to **share personal stories, give representation to diverse communities, and provide guidance and expertise regarding the importance and development of D&I policies** in businesses within the Amsterdam municipality. This initiative aims to **connect the personal narratives of ambassadors with structural D&I goals**, ensuring that **authentic representation** and **company engagement** are present across organisational levels.

8.1.2. Practice Overview

The *Inclusiecollectief Ambassadeurs* initiative was first introduced in 2022 in the Netherlands by HVO-Querido, a third-sector charitable organisation in the health and social care sector, based in Amsterdam. In 2023, HVO-Querido became a signatory to the Charter Diversiteit²³⁹ (Dutch Diversity Charter). HVO-Querido currently employs 1,700-1,800 individuals who aim to provide health and social services to around 2,000-3,000 beneficiaries, most of which constitute as “vulnerable people” (homeless, sex workers, individuals with mental health problems). HVO-Querido’s services include **offering temporary shelter or housing support, professional and personal guidance, recovery-oriented support groups and counselling**.

The *Inclusiecollectief Ambassadeurs* initiative seeks to **bring D&I efforts to life by sharing personal stories**. Staff members volunteer to serve as ambassadors - **representatives of diverse groups** such as LGBTIQ employees, neurodiverse individuals, or members of specific cultural or ethnic minority communities. These ambassadors **play a key role in developing understanding and engagement** by creating **personal connections and building rapport** with both **internal colleagues and external stakeholders**. Rather than relying solely on formal policies, the initiative uses **storytelling** and **interpersonal relationships** to highlight core D&I matters in a more impactful and relatable way. Ambassadors ensure that voices from all parts of the workforce are heard, especially on matters that affect their communities²⁴⁰. They also **contribute** actively to **shaping future policies**, helping the organisation **stay inclusive and responsive** to the needs of its diverse team. The **flexible structure** of the programme ensures that **all employees** - whether full-time, part-time, permanent, or temporary—**can participate** and benefit from the Ambassador scheme with **roles tailored to their comfort and competencies**²⁴¹.

Inclusiecollectief Ambassadeurs initiative began as **an internal series of storytelling workshops**, where employees shared personal experiences related to challenges with D&I or significant moments that had shaped their perspectives. These workshops proved **highly**

²³⁸ HVO-Querido

²³⁹ SER (no date).

²⁴⁰ GP_1_WRK INT.

²⁴¹ GP_1_ORG INT.

effective at increasing staff engagement and deepening understanding and appreciation of D&I matters. Building on this success, the informal conversations evolved into a structured programme with groups of 11–12 ambassadors guided by facilitators. Ambassadors **meet regularly to set priorities, participate in training, and advocate for their communities at external events**. At these events, HVO-Querido **showcases portraits and stories** of the ambassadors, creating a **powerful visual representation of their experiences**²⁴². This storytelling approach **resonates** deeply with audiences – *"People resonate much more to this than dry, nicely written policies"*²⁴³ – and thus offers a **more relatable and interactive experience** for showcasing D&I matters than through typical policy documentation. The programme's design allows ambassadors to tailor their roles and communication styles, ensuring broad accessibility and fostering inclusivity across diverse audiences.

8.1.3. Case study achievements and impact

The initiative has resulted in the achievement of several key impacts:

- **Employee Engagement and Representation:** The initiative empowered ambassadors to **adopt an advocacy position** for D&I, amplifying employee voices and bridging gaps between the workforce and leadership. HVO-Querido's guiding principle of *"Nothing about us without us."*²⁴⁴ allowed for authentic representation and helped in shaping and influencing policy developments. Ambassadors facilitated **open conversations** on sensitive topics, **creating a safe environment for dialogue:** *"Now we can openly speak about being different"*²⁴⁵. Beyond internal advocacy, ambassadors could **represent the concerns of employees at external events as a means of giving visibility to issues and topics** impacting their demographic whilst sharing their organisational experiences with others. This dual role created a *"domino effect"*²⁴⁶ of cultural awareness, expanding the programme's reach outside of the organisation.
- **Beneficiary Operations:** *Inclusiecollectief Ambassadeurs* facilitated **enhanced client-facing practices**, where **improved awareness** training equipped social workers to better navigate cultural, religious, and neurodiverse sensitivities effectively. This allowed for more equitable care and support for HVO-Querido's 3,000 beneficiaries.
- **Representation facilitates more inclusive workplace Culture:** The initiative transformed workplace culture by **lowering barriers to discussing discrimination and inequality**, meaning these topics were better able to be addressed openly. Ambassadors served as **relatable role models**, helping employees **connect** with the values that the programme was promoting. As reflected upon by one interviewee *"You're going to identify yourself with somebody."*²⁴⁷ Thus, **employees now felt seen, heard, and valued** in an inclusive environment by seeing themselves represented within the company. This cultural shift created a sense of belonging and

²⁴² This bears similarities to an already existing project in Denmark, see The Human Library (no date).

²⁴³ GP_1_ORG INT.

²⁴⁴ Ibid.

²⁴⁵ GP_1_WRK INT.

²⁴⁶ Ibid.

²⁴⁷ Ibid.

encouraged employees to take ownership of initiative development and the implementation of new policies.

- **Professional and personal development of ambassadors:** Ambassadors benefited from **additional training to develop their skills** in communication, advocacy, and leadership. This was considered to improve the effectiveness of promoting D&I topics internally and **contributed to their personal and professional growth**. Becoming an Ambassador “*gives you a lot of confidence.*”²⁴⁸.
- **Institutional Integration of D&I:** The programme reshaped recruitment practices to **promote inclusivity across all organisational processes**. Ambassadors contributed to refining the hiring processes, promoting equitable representation across the workforce. While consulted stakeholders assess that progress has been significant, they also observed that challenges, such as addressing systemic issues like racism, persist: “*We talk about diversity and inclusion...but we don’t talk about racism.*”²⁴⁹

Challenges pertained to **time constraints** for upper management’s involvement and **GDPR restrictions that limited data collection** on diversity metrics, such as racial or ethnic origin, or religion. To mitigate these, the organisation utilised qualitative assessments, including updating their internal records to include additional data collected through employee interviews. At present, the organisation is currently exploring more systematic approaches to measurement.

Key success factors of the programme included **the dedication and passion** of staff members who actively supported the initiative. These individuals were willing to engage fully and speak openly about D&I matters, **contributing authenticity** and impact to the programme. Structured support was equally crucial, with regular team meetings and formalised training sessions providing a strong foundation for its continued effectiveness and long-term sustainability.

The initiative’s success was also closely aligned with HVO-Querido’s three-year D&I action plan (2023–2026), which outlines targets across five key levels²⁵⁰:

1. **Organisational Level:** Embedding D&I principles into the organisation’s core operations and values.
2. **HR/Management Level:** Promoting diversity in leadership and recruitment practices.
3. **Collective Level:** Establishing an internal D&I committee and appointing representatives in each office location.
4. **Leadership Level:** Ensuring leaders participate in diversity programmes and act as role models for inclusivity.
5. **Individual Level:** Educating employees on D&I topics to inspire greater awareness and engagement.

Finally, the **programme’s flexibility**—allowing ambassador roles to be tailored to individual work schedules and communication styles—was instrumental in making the initiative accessible to all employees, encouraging broader participation.

²⁴⁸ Ibid.

²⁴⁹ Ibid.

²⁵⁰ GP_1_ORG INT.

8.1.4. Transferability and Lessons Learnt

Inclusiecollectief Ambassadeurs demonstrates how **personal storytelling, structural support, and representation** can create a unique, compelling and effective approach to D&I. Insights from the organisation revealed an adaptable model for business across sectors. Interviews revealed the success of this practice hinged upon three critical factors:

1. **Structural Support:** By embedding D&I into the organisational framework, and allocating dedicated work hours to ambassador activities, the programme ensured commitment to its continuation. *"You don't have to do it outside your hours."*²⁵¹.
2. **Authentic Representation:** The inclusion of employees from underrepresented groups allowed the initiative to resonate across audiences, both within the company and beyond, including beneficiaries and external stakeholders.
3. **Training and Development:** Equipping ambassadors with the skills to engage effectively at all levels, from internal discussions to external advocacy, protected the initiative's sustainability.

For other organisations aiming to implement similar programmes, the following lessons were gleaned from one HVO-Querido interview²⁵²:

- ***"Hire someone...who can make connections within and outside the company"*** Appointing individuals and providing them with clearly defined responsibilities meant that organisational D&I remained a priority.
- ***"[Developing and implementing D&I] processes take time...this process is going to take 5, maybe 10 years."*** D&I initiatives require sustained effort and time to establish lasting cultural change. Patience and long-term commitment are essential.
- **Leverage Storytelling for Impact:** The use of personal narratives, as opposed to formal policies, resonates deeply with stakeholders, fostering connection and this, in turn, facilitates acceptance and understanding.

Organisations with diverse workforces and client bases—such as healthcare, education, and public services—stand to **benefit significantly from adopting an ambassador-led model**. Flexibility, in regard to **fitting Ambassador duties within the daily workload of employees** was a key component to the success of these roles, and a **commitment to diverse representation** will help to adapt this initiative to varying contexts and organisational needs. By **integrating storytelling alongside structural support**, the *Inclusiecollectief Ambassadeurs* initiative showcases how authentic representation and targeted D&I efforts can transform organisational culture, operations, and external perceptions. The programme's successes and lessons provide a roadmap for other organisations striving to achieve meaningful inclusivity.

²⁵¹ Ibid.

²⁵² GP_1_WRK INT.

8.2. Fair pay and inclusive employee benefits – Green canned fruit and vegetable production company

8.2.1. Introduction

Since 2017, the Greek canned fruit and vegetable production company has been developing and implementing fair pay and inclusive employee benefits to enhance employee recruitment and retention. These practices include fair pay based on objective and transparent criteria, coverage for sick leave and medical expenses, additional paid annual leave, and bonus payments²⁵³. In 2024, the company earned the 'Great Place to Work' certificate from the Great Place To Work® Institute for fostering a high-trust workplace culture²⁵⁴. During the certification process, 94% of the employees reported making a meaningful contribution to the company²⁵⁵. As a result of these practices, the company has fostered positive employee attitudes towards working conditions and management, which, in turn, improved workforce recruitment and retention.

8.2.2. Practice Overview

The company is a canned fruit and vegetable production company based in Greece. Its workforce includes both permanent and temporary employees, with up to 600 workers during peak season fruits and vegetables collection and processing²⁵⁶. The staff performs both skilled and unskilled tasks. **The fair pay and inclusive benefits practice covers all employees regardless of their role or employment type.** The company is a signatory of the Diversity Charter.

Since 2017 it has been developing and implementing fair pay and other inclusive employee benefits to enhance employee recruitment and retention.

Employee salaries are reviewed annually based on the average wages for specific jobs in Greece. The 2023 Sedex members ethical trade audit (SMETA) report²⁵⁷ revealed that, while the legal minimum salary in Greece at the time of audit was € 713, the site paid a minimum wage of € 900. The audit found that even the lowest-paid production workers earned more than the legal minimum wage in Greece. The SMETA audit concluded that **all human resources decisions**, including compensation, **are based on objective and transparent criteria.**

To attract university graduates, the company offers salaries ranging from €1000 to €1200. After six months, based on performance appraisals, employees can expect a raise to €1400 – €1500. According to the company data, the wages increased by 30% to 35% between 2017 and 2024²⁵⁸.

All employees are eligible for various benefits, including:

²⁵³ GP_2_ORG INT.

²⁵⁴ GP_2_ORG INT; Great Place To Work® Institute, 2024.

²⁵⁵ GP_2_ORG INT.

²⁵⁶ Company's website, no date.

²⁵⁷ European Inspection and Certification Company, 2023.

²⁵⁸ GP_2_ORG INT.

- The company pays full salary during sick leaves to offset reduced income from standard social security payments. In 2023, it paid € 60000 to cover 280 sick leaves due to COVID-19 between July and September.
- Coverage of medical expenses, such as surgery, can be covered by the company as well. These cases are less frequent than sick leaves.
- All employees are provided three additional days of annual leave, in addition to the annual leave granted by Greek law. More additional days are granted for employees donating blood to a local blood bank.
- Performance-based bonuses at the end of the production season for all employees.

8.2.3. Case study achievements and impact

In 2024, the company earned the ‘Great Place to Work’ certificate for fostering a high-trust workplace culture²⁵⁹. This certification scheme measures five dimensions of an employee experience through an anonymous survey, including leader actions and building trust (credibility, respect, and fairness), and relationships among coworkers and the wider organisation (pride and a sense of belonging)²⁶⁰. According to the certification findings, **94% of employees felt that they made a meaningful contribution to the company**²⁶¹. The company received a score of 77 out of 100.

According to the company management, fair pay and support activities resulted in a **strong employee recruitment and retention**²⁶². Despite labour market shortage, the company does not face any **workforce recruitment challenges**. The company also reports improved retention, with employees staying for an average of 12 years with the company²⁶³.

Overall, employees are highly satisfied with working conditions and maintain a positive attitude towards the workplace and management.

Both the management and the employee representative agreed that **open communication and training** are key success factors to the company’s activities, including fair pay and inclusive benefits. Employees are informed on the policies, including salary and benefits, through introductory training for new hires and regular ongoing training sessions. Employee feedback is gathered through an anonymous complaint box and easy access to management²⁶⁴.

The company also **maintains close and strong ties with the local community and actively uses social media** to promote its D&I programmes. These initiatives are not only key to attracting and retaining staff but also ensure that employees, regardless of their background or contract type, benefit from an inclusive workplace. By offering targeted support, such as tailored training and flexible work arrangements, the company fosters a sense of belonging and equal opportunity, reinforcing its commitment to D&I beyond standard job benefits.

²⁵⁹ Ibid.

²⁶⁰ Great Place To Work® Institute, no date.

²⁶¹ Great Place To Work® Institute, 2024.

²⁶² GP_2_WRK INT.

²⁶³ GP_2_ORG INT.

²⁶⁴ GP_2_WRK INT; GP_2_ORG INT.

8.2.4. Transferability and Lessons Learnt

Fair pay and inclusive benefits practices are transferrable to other organisations as they do not rely on industry- or region-specific solutions. The company actively promotes its D&I practices to other Greek companies in their region. However, for certain organisations, e.g., industry or business associations that implement D&I policies within their member networks, this case study may not be suitable as it focuses on direct benefits to employees rather than to the organisation's members.

8.3. Avoim tiedolle -yhdenvertaisuuskampan (Open to Knowledge campaign) - Akava

8.3.1. Introduction

The *Open to Knowledge* campaign,²⁶⁵ implemented by Akava, Confederation of Unions for Professional and Managerial Staff in Finland, is part of a wider range of activities the association carries out to develop D&I within the organisation, its members, and Finland in general. This initiative aims to **inform and discuss about LGBTIQ discrimination issues** among politicians, activists and various organisations active in the labour market. In the context of this campaign, Akava also works for a better equity legislation **by collaborating with the relevant Ministries** in Finland.

8.3.2. Practice Overview

The *Open to Knowledge* campaign²⁶⁶ was firstly introduced in 2023 and it was repeated in 2024 in Finland by Akava, a trade union organisation comprising 36 affiliates with over 600,000 individual members. This initiative took place ahead of PRIDE and was partly aimed at celebrating it.

As a first step in the campaign, **the organisation commissioned a survey**²⁶⁷ from an external provider **to explore the views of highly educated Finns** under 35 years old specifically asking whether they had witnessed any discrimination related to sexual orientation or gender identity. A media campaign was developed alongside the survey and named #Opentoknowledge. Akava prepared **ready-to-use materials and communication plans** for all their members to use during the campaign²⁶⁸.

Akava collaborated with SETA, a Finnish advocacy organisation focusing on human rights and inclusion, to conduct training sessions for both Akava's affiliates and SETA's employees. These **trainings sessions** covered various topics, including **inclusive recruitment practices and understanding how working life can differ** for diverse groups of people.

Furthermore, **a seminar was organised with other labour market organisations** where LGBTIQ discrimination was discussed among politicians, activists and other stakeholders active in the labour market²⁶⁹.

The initiative **complemented earlier efforts** to improve equity legislation, which Akava has pursued through participation in working groups of the relevant Ministries during 2022 and 2023²⁷⁰. Together, these two actions - the renewal of the equality legislation and the #Opentoknowledge campaign - formed a cohesive effort which strengthened Akava's ability to promote better D&I policies, both within the organisation and more broadly.

²⁶⁵ Akava, 2024.

²⁶⁶ Ibid.

²⁶⁷ Juko, 2023.

²⁶⁸ GP_3_ORG INT.

²⁶⁹ Ibid.

²⁷⁰ Ibid.

8.3.3. Case study achievements and impact

Key success factors of the initiative included²⁷¹:

- **Trainings.** The campaign included training sessions delivered by certified trainers on a range of topics. These sessions were open not only to Akava's members, but also to all the employees of affiliated member organisations. Although the training sessions were held during working hours, which initially made it more difficult to recruit participants, the final turnout was good, demonstrating strong interest and engagement.
- **Change in the marketing and communication approach.**
 - **Language:** The association has significantly changed its internal and external communication by adopting gender-neutral language. For instance, when conducting studies for members, staff now carefully consider whether asking for gender is necessary: If it is deemed relevant, additional categories beyond male or female are included.
 - **Materials:** Communication and marketing materials have become more inclusive. For example, diverse individuals are now more prominently represented in communication materials, such as photos, illustrations and other media used by the association.
- **Highlight the importance of D&I.** The campaign provided an opportunity to demonstrate to Akava's members and their affiliates that D&I are taken seriously. The initiative showcased how these principles are embedded in the organisation's advocacy efforts and broader activities.

Measuring impact and challenges

The association **measured the impacts** of the initiatives by analysing media coverage during the campaign, **tracking and monitoring the number of participants** in the training sessions, and **collecting feedback** from attendees.

Akava received positive feedback on the training sessions, with participants particularly valuing the presentation of data from studies highlighting the challenges faced by LGBTQIA+ members and how they were addressed in the workplace.

8.3.4. Transferability and Lessons Learnt

This type of campaign is well-suited to a large organisation with a diverse audience and many different members. It enables broad engagement at the employee level through the development of training sessions and materials tailored to suit all unions and their members.

Key lessons learnt included:

Collaboration. Akava emphasised the importance of finding allies and partnering with them. Being open to networking with organisations that share similar views on specific D&I topics provided an important strategic advantage in raising issues on the political agenda and influencing policies and legislation. Moreover, collaboration with like-minded partners enhanced the **cost-effectiveness** of the initiative.

High-level organisation. The campaign's central coordination by Akava, an umbrella association, was highly valued by interviewees for several reasons:

²⁷¹ GP_3_WRK INT.

- All unions and members discussed the same topics simultaneously, amplifying their collective voice and fostering a sense of belonging among employees.
- Member organisations saved costs, resources, and time, because all materials were developed centrally by Akava and were ready for use by its members.
- Employees across all unions could participate in unified training sessions, avoiding the need for each union to organise their own separate sessions and materials.

Choosing the right time. Akava highlighted the importance of strategically timing the discussion on specific D&I topics. Aligning these with existing political agendas or significant public events, such as PRIDE, helped to maximise the impact. However, the organisation also stressed that work on D&I should not be confined to a single campaign but must be continuous and embedded in the organisation's core values.

8.4. LavoriamoCi & Soci Caffè²⁷² (Let's Work on It & Members Cafe) – Impronta Etica

8.4.1. Introduction

The *LavoriamoCi* initiative, developed by Impronta Etica, combines **practical workshops** and **collaborative exercises** among the organisation's members to embed D&I principles within workplace practices. *LavoriamoCi* serves as a **structured programme** addressing D&I in areas such as **recruitment practices**, **workplace language**, and **organisational culture**. It runs in tandem with *Soci Caffè*, a series of **informal discussions between member companies** on key sustainability aspects. Through open discourse and providing **tools for real-world application** of D&I strategies for business, the initiative aims to establish inclusive environments where **values are integrated into daily operations**. Combined, *LavoriamoCi* and *Soci Caffè* connected **best practice exchange** with tangible D&I **business goals** to assist Impronta Etica's members move from theoretical understanding to actionable change, creating a safer, more inclusive environment and external interactions.

8.4.2. Practice Overview

Founded in 2001, Impronta Etica is a non-profit organisation focused on improving sustainability (viewed holistically to integrate environmental and social aspects) through collaboration among business, institutions and civil society. Over the two decades of its operations, it has grown to include **36 member companies** and is widely regarded within the Emilia Romagna region in Italy as a hub for sustainable innovation and transformative practices. Through its two flagship initiatives – *LavoriamoCi* and *Soci Caffè* – it aims to promote inclusive practices and corporate responsibility to ensure its members contribute meaningfully to shared societal goals.

The *LavoriamoCi* initiative was introduced in May 2024, building on an increased level of interest observed by member organisations on D&I topics, as discussed throughout the 2023 *Soci Caffè* sessions. The aim of *LavoriamoCi* was to **develop these informal discussions into a structured engagement programme** that equipped members with the necessary **knowledge base and practical skills**²⁷³ to address prevalent D&I topics such as gender disparities, cultural differences, and mental health within member organisations.

As a consequence, the initiative targets a broad range of diversity matters and workers within participating organisations including HR professionals, senior management, and operational staff. To bolster the effectiveness of the initiative, it encourages participation from underrepresented groups in D&I discourse, particularly male employees regarding discussions on gender parity. Special attention was given to ensure that a **safe, non-judgemental environment** was established where all workers could engage freely with discussions, promoting inclusivity across full-, part- and temporary staff members.

To ensure that the *LavoriamoCi* initiative yielded both practical and impactful outcomes for organisations, the project was **compartmentalised into distinct phases**²⁷⁴. This allowed for a gradual increase in understanding, application and engagement, which benefitted members in identifying how their learning could be applied to their everyday business

²⁷² Impronta Etica (2023a); GP_4_ORG INT.

²⁷³ GP_4_ORG INT.

²⁷⁴ Ibid.

practices. Each stage was designed to address specific aspects of D&I topics. *LavoriamoCi* unfolded in four stages:

1. **Learning Phase:** Participants were introduced to key D&I topics and their relevance to the workplace was highlighted via interactive roundtables. These sessions established a “foundation” for understanding systemic challenges and how to address them. As noted by a participating Italian social welfare organisation: “We started from the challenges on the topic and then we went to the tools to *sol*ve that challenge”²⁷⁵.
2. **Application Phase:** The previously acquired theoretical understanding was then contextualised via group discussions about potential scenarios that required D&I awareness and training.
3. **Tools and Resources:** Members were given prepared tools such as inclusive language guides and “scenario-planning” exercises to learn from and apply to situations.
4. **Interactive Workshops:** These were collaborative sessions that allowed members to engage in role-playing exercises, tackling real-world scenarios surrounding issues of unconscious bias, recruitment discrimination and sensitive language in a practical way.

Each session was facilitated by external D&I experts to allow for credible advice and actionable insights that were tailored specifically to the business environment. In the case of an Italian social welfare organisation, their participation in the *LavoriamoCi* initiative led to the formation of an internal ‘Gender Equality Committee’ which helped the organisation achieve gender equality certification in 2023²⁷⁶. The opportunity to collaborate with other enterprises through *LavoriamoCi* was invaluable, with the Italian social welfare organisation noting: “*Being part of a network is a very big opportunity because you can get different perspectives from companies operating in different sectors*”²⁷⁷.

8.4.3. Case study achievements and impact

LavoriamoCi and the *Soci Caffè* have achieved notable success in advancing workplace inclusivity and awareness within Impronta and its member organisations. Insights gleaned from an Italian social welfare organisation interview revealed a series of organisational changes²⁷⁸.

- **Cultural Transformation and Behavioural Change:** Workshop discussions on unconscious bias and gender stereotypes facilitated increased staff engagement with D&I topics. Employees began to openly participate in public events and forums about inclusion. This supported the establishment of the Italian social welfare organisation’s Gender Equality Committee, a dedicated group responsible for guiding employees, tackling internal harassment and discrimination, and ensuring compliance with newly developed policies. The culmination of these efforts led to the attainment of gender equality certification, a legally recognised award that highlights a businesses commitment to gender equity.
- **Policy Development:** Participation in *LavoriamoCi* resulted in a redesign of the Italian social welfare organisation’s recruitment practices and HR leadership. The organisation developed new strategies to ensure that fairness and respect for new hires was implemented to increase the diversity of talent. As noted by the Italian

²⁷⁵ GP_4_WRK INT.

²⁷⁶ Ibid.

²⁷⁷ Ibid.

²⁷⁸ Ibid.

social welfare organisation, “*They are talking about [D&I topics], and we started a bigger conversation...this was one of the first results*”²⁷⁹.

- **Staff Wellbeing and Inclusivity:** The Italian social welfare organisation was able to recognise and subsequently incorporate staff wellbeing within their D&I policies as a result of their participation.
- **Practical Support:** The initiative “Job Club Programme” in collaboration with the Spazio Donna Centre provided vulnerable women with support in CV writing, interview preparation, and job searching guidance. In addition to this, it provided psychological counselling and language courses.

The interview with Impronta representatives synthesised the key success factors of this initiative into three areas:

- **Expert Facilitation:** Involving D&I specialists to provide workshops and events with enhanced credibility and the ability to provide members with tailored feedback.
- **Practical Engagement:** Using hands-on workshops with a focus on real-world applications.
- **Collaborative Environment:** Establishing a non-judgemental atmosphere to encourage candid discussions and broader participation.

Outcomes and measurement were assessed through a series of qualitative feedback measures, namely informal staff interviews, and general observations of workplace changes²⁸⁰. The Italian social welfare organisation, for example used informal feedback approaches after each training session to gauge its impact. In the *Spazio Donna* initiative, the Italian social welfare organisation distributed “*empowerment questionnaires*” to participants to help measure the impact of the sessions. Feedback mechanisms ultimately helped the Italian social welfare organisation to track the progress and effectiveness of their own initiatives. Beyond measurable aspects, the Italian social welfare organisation observed benefits across individual (empowerment of women, increased job readiness and confidence), organisational (increased prioritisation of inclusion), and societal (contributing to reducing regional gender inequalities) levels²⁸¹.

Despite the benefits felt by the Italian social welfare organisation (and other participating organisations), *LavoriamoCi* was not without challenges. Finding ways to balance training with operational responsibilities was a significant barrier, as was organisations being able to secure sufficient resources. In the instance of the Italian social welfare organisation, these challenges were mitigated by enshrining D&I as a strategic goal and leveraging government funding from the region. According to the Italian social welfare organisation, networking and exchange of best practices with other member organisations further supported cost-effectiveness of implementation²⁸². More generally, Impronta Etica highlighted aspects such as resistance from senior management as a prevalent issue, as some individuals regarded D&I initiatives as time-intensive or non-essential. To counter this, Impronta Etica framed D&I as a strategic advantage for talent retention and operational flexibility²⁸³.

²⁷⁹ Ibid.

²⁸⁰ GP_4_ORG INT; GP_4_WRK INT.

²⁸¹ GP_4_WRK INT.

²⁸² GP_4_WRK INT.

²⁸³ GP_4_ORG INT.

8.4.4. Transferability and Lessons Learnt

The informal beginnings of *LavoriamoCi* highlight the value of cost-effective engagement strategies as a precursor to more structured interventions. *LavoriamoCi* provides a highly transferable model for promoting D&I across diverse organisational contexts. Its phased structure, starting with informal discussions and progressing to structured workshops, offers an adaptable roadmap for organisations seeking to advance inclusivity. Networking provided opportunities to exchange ideas and enrich their own policies with broader relevance and applicability. Key lessons include:

- **Engage Through Collaboration:** Diverse participation fosters richer insights and shared ownership of solutions.
- **Prioritise Practical Learning:** Interactive workshops were more effective in driving behavioural change than theoretical approaches.
- **Frame D&I Positively:** Emphasising inclusion as an opportunity rather than a challenge encouraged leadership buy-in.

Having regular dialogue on D&I matters, whether formally or informally, was cited by both representatives as an essential element to this initiative. Holding discussions raised awareness and encouraged long-lasting, positive cultural changes. Additionally, extending D&I training to all employees beyond HR staff, was beneficial in amplifying the message and effectiveness of new inclusive policies. Tailoring initiatives to the specific needs of organisations, while leveraging partnerships and funding opportunities, will be critical for replication²⁸⁴.

²⁸⁴ GP_4_ORG;GP_4_WRK.

8.5. Activities promoting talent and excellence and equitable gender culture - EnterprisinGirls

8.5.1. Introduction

Since 2014, EnterprisinGirls²⁸⁵ has undertaken various activities aimed at building a network to enhance talent in the labour market by **developing relationships among micro, small and medium-sized companies**. The association also has a broader transversal objective of contributing to the dialogue for **achieving gender equality**, extending beyond the workplace. Its activities include **awards, campaigns and information activities** designed to promote talent and excellence while fostering gender-conscious culture to challenge and overcome stereotypes.

8.5.2. Practice Overview

EnterprisinGirls is an association founded in 2014 by a group of freelance entrepreneurs and women working in the third sector. While the network operates nationally in Italy, it **maintains strong international relations** with associations in other European countries, fostering interactions on various occasions. The driving force behind its creation and ongoing activities has been a commitment to promoting cultural change, where diversity is valued and recognised as mutually enriching²⁸⁶.

In 2016, the association began conducting **information campaigns** across universities and schools in Italy focusing on topics such as the portrayal of the female body in advertising, cognitive biases in machine learning and artificial intelligence systems, and the use of gender-inclusive language²⁸⁷.

Furthermore, the association is dedicated to challenging stereotypes in the workplace, including the misconception that there are distinct 'male' and 'female' economies. Instead, it advocates for the understanding that there is only a singular economy but expressed in a different approach to work.

The association has also established **two awards**:

1. **EnterprisinGirls Award**²⁸⁸: Established in 2016, this award honours women who have pursued professional careers typically considered non-traditional for women, therefore have paved new paths. The award was created to showcase positive role models of women who can inspire others.
2. **Literary Award for the Literature of Roots**²⁸⁹: Launched in 2023, this award recognises texts that focus on the construction of identity paths. These narratives are not limited to the phenomenon of immigration experiences but also encompass

²⁸⁵ EnterprisinGirls, no date.

²⁸⁶ EnterprisinGirls, no date; GP_5_ORG INT.

²⁸⁷ GP_5_ORG INT.

²⁸⁸ EnterprisinGirls, no date

²⁸⁹ EnterprisinGirls, 2024.

the transmission of memory. This project emerged from another project started in 2022 by one of the association's members, who is part of the board that founded a cultural newspaper, "*Le Disobbedienti*"²⁹⁰. The newspaper reviews editorial news dedicated to the stories of women who, by challenging the social norms of their time, have forged new paths.

Over the past two years (2022 and 2023), the association has participated in the event "**4Weeks4Inclusion**", an annual initiative organised by the Italian telecommunication company Tim²⁹¹. It is a month of online events in which people discuss inclusion in its various dimensions. EnterprisinGirls has contributed to the initiative during two editions:

1. 2022: EnterprisinGirls contributed to two online events²⁹²:
 - "*The Inclusiveness and Sustainability of Roots Tourism*". This event focused on the inclusion of descendants of Italians who had migrated abroad and now return to the country to rediscover their roots.
 - "*Women 4 Women: the footprint of women in the economy, work and technology*". This event focused on the inclusion of women of all ages and socio-economics characteristics in the workforce, with particular emphasis on the tech sector.
2. 2023: The event focused on *teaching as a tool for inclusion*²⁹³.

The association is also committed to the **eradication of age discrimination** through the creation of diverse working groups, consisting of younger and older associates, to promote continuous and meaningful exchange. The overarching goal is to challenge the stereotype and prejudice that older workers are incapable of adapting to digital advancements and emerging new phenomena in the workplace.

8.5.3. Case study achievements and impact

This practice has been recognised as a best practice for its achievements and tangible **results by two prominent European networks**: European Network for Innovation²⁹⁴ and WEgate - European gateway for women's entrepreneurship²⁹⁵, a network launched in 2015 by the European Commission (DG GROW).

Furthermore, it received **external recognition** from the International Coaching Federation (ICF), which invited the association to participate in their IGNITE project²⁹⁶. This project promotes coaching in Italy, generating positive impacts to support Quality Education and Gender Equality, the goals number 4 and 5 of the 17 goals for Sustainable Development of the UN Agenda 2030. By fostering coaching initiatives, the association has contributed to

²⁹⁰ IIMondodiSuk, no date.

²⁹¹ GruppoTIM, no date.

²⁹² EnterprisinGirls, 2021

²⁹³ EnterprisinGirls, 2023.

²⁹⁴ EnterprisinGirls,2021.

²⁹⁵ EnterprisinGirls,2016.

²⁹⁶ EnterprisinGirls, 2024.

addressing key societal challenges, including narrowing gender disparities and enhancing educational opportunities²⁹⁷.

The organisation has observed a range of significant positive outcomes and tangible results emerging from its activities²⁹⁸. Among these, one of the most notable achievements has been the cultivation and enhancement of strong collaborative abilities among participants. This development has not only improved teamwork and communication but also fostered an inclusive environment where individuals can work together harmoniously toward shared goals. Moreover, the organisation has demonstrated a unique ability to bring together people from diverse age groups, bridging generational gaps and promoting mutual understanding and respect across different demographics.

In addition to these interpersonal successes, the organisation's initiatives have driven meaningful changes in the operational and structural patterns of various workplace settings.

Despite these successes, the association faces several **challenges** in its activities:

- Building the right connections to establish its presence and visibility in Italy.
- The reluctance of companies and associations in Italy to collaborate and share ideas, activities, and projects with other companies and associations.
- The lack of dedicated departments or resources for diversity, inclusion and equity in micro, small, and medium-sized enterprises.

To address these challenges, the association has implemented several strategic approaches:

Establishing partnerships: The association has proactively sought like-minded organisations and companies at both the Italian and European levels, fostering partnerships that facilitate the exchange of ideas and best practices. Through these collaborations, they have developed joint projects that amplify their impact and extend their reach.

Enhancing visibility through networking events: To build connections and establish a stronger presence in Italy, the association has participated in and organised networking events, conferences, and workshops. These events serve as platforms to showcase their initiatives, engage potential collaborators, and attract stakeholders aligned with their mission.

8.5.4. Transferability and Lessons Learnt

The EnterprisinGirls model is replicable by other associations with similar objectives, as it is not tied to industry-specific or region-specific solutions, and it is based on concrete experience.

The association emphasised the importance of **collaboration and teamwork** between companies and associations, highlighting the importance and value of having partners, particularly at the European level. Such partnerships provide opportunities to illustrate this

298 GP_5_ORG INT.

working method and promote it as a model that can be adapted, replicated and implemented by other organisations.

8.6. Diversity IN Check - Forum Odpowiedzialnego Biznesu

8.6.1. Introduction

The *Diversity IN Check (DINC)* initiative was launched in Poland in 2020 by the Forum Odpowiedzialnego Biznesu – *Responsible Business Forum (FOB)*²⁹⁹, the longest-running and largest governmental organisation in the country, responsible for the coordination of the Polish Diversity Charter³⁰⁰ (Karta Różnorodności). The *DINC* survey is certified, meaning it follows and adheres to **scientifically rigorous standards and measurement criteria** (SDGs, OECD Guidelines, and ISO 26000)³⁰¹ to produce an **annual diagnostic tool** helping organisations to **assess their D&I maturity** and **adopt effective strategies**. By **promoting accountability and knowledge sharing**, *DINC* has empowered participating organisations to improve their processes, policies and practices, leading to transformative changes. As noted by one such participating business, “*DINC is a checkpoint*”³⁰² that enables organisations to **align their D&I practices both comprehensively and consistently across operations**, from supply chains to client relations.

8.6.2. Practice Overview

The *DINC* survey is intended as an **educational and internal monitoring tool** for organisations to **assess their performance** in D&I management and the **implementation** of diversity policies and practices. Through this, it aims to:

- Provide organisations with a thorough assessment of their maturity in managing D&I;
- Identify strengths and areas for improvement;
- Enhance business innovation and contribute to improved financial performance;
- Promote social cohesion and inclusive workspaces; and
- Facilitate knowledge sharing of best practices among organisations.

Participating organisations receive **detailed feedback, tailored recommendations, and certification**. High performers (organisations receiving a high number of points, reflecting high levels of D&I maturity) are **recognised on a public list of Poland’s leading D&I employers**, allowing others to assess their D&I performance, and boost their employer branding. The overall results of the *DINC* **remain anonymous**, meaning that the names of organisations that underperform are not publicly listed. Instead, the report remains for their internal use only for continued guidance. As noted by one interviewee³⁰³, this provided a “*big, but at the same detailed picture of the whole DEI arena*”³⁰⁴ on a national level, allowing the company to **address existing gaps within company policies**, such as introducing neurodiversity-oriented measures.

²⁹⁹ Forum Odpowiedzialnego Biznesu, no date a.

³⁰⁰ Forum Odpowiedzialnego Biznesu, no date b.

³⁰¹ DG JUST, 2021; CH-PL-1 INT.

³⁰² GP_6b_WRK INT.

³⁰³ GP_6A_WRK INT.

³⁰⁴ GP_6a_WRK INT.

Since 2020³⁰⁵, it has attracted 131 organisations to participate, with the latest iteration in 2024 drawing 77 participants – a number that one interviewee³⁰⁶ foresees to incrementally rise annually. The 4th edition of the survey (2024) included businesses from diverse sectors such as **services and transport (41%)**, **finance (18%)**, **consumer goods (18%)**, **energy and industry (16%)**, and **administration (4%)**³⁰⁷. The survey was originally tailored to suit individual sectors but has now been **refined for uniformity**. The survey is designed in a consistent way for **questions to be applicable to any organisations and business operations processes** – covering services, manufacturing, language used in communication, and how groups of workers are represented in communication materials³⁰⁸. Upon receiving feedback from stakeholders, in 2023, a supplement for the creative industry was introduced, allowing for **the inclusion of micro-enterprises** from this sector.

DINC consists of two components: **Research**, which assesses D&I maturity through quantitative data, and **Listing**, which highlights organisations that meet specific D&I standards. Data from the *DINC* survey is **systematically collected, verified, and analysed** across **five thematic areas** and **verified against source documents and interviews**, allowing for a robust evaluation framework of D&I maturity:

- **Management Basics:** diversity strategy and implantation, risk management in counteracting discrimination, dimensions of diversity important for the company.
- **Programmes and activities:** equal opportunities in remuneration, good practice initiatives that increase accessibility and support employees, education on D&I in the workplace.
- **Building engagement:** commitment of board and management, tools for internal communication, company involvement in external activities.
- **Results indicators:** indicating metrics for sex, disabilities, citizenship as well as gender parity in management, promotion and turnover.
- **Products and Services**³⁰⁹: accounting for groups at risk of discrimination in the creation of products and services.

Each year, organisations can take part in the survey, with the content and format of the questions changing slightly across the years. In 2024, participating organisations completed an online application and an 80-question survey on their 2023 D&I practices. *DINC*'s impact extends across sectors and includes SMEs, micro-organisations, and large businesses. Non-Charter members could also participate but had to pay an additional fee.

8.6.3. Case study achievements and impact

Insights from two organisations with regular participation in the *DINC* initiative revealed the impact it has had on refining their existing D&I policy frameworks and implementation of novel, yet impactful, initiatives. The achievements can be categorised as:

- **Enhancing D&I Policies and Practices**
- **Driving Organisational Change**
- **Improving Employee Engagement and Retention**

³⁰⁵ An earlier version of the DINC survey was conducted by Deloitte; however, high participation fees were seen as prohibitive, deterring many organisations from taking part. As a result, the survey was predominantly comprised of participants from the banking and financial sectors (insights from GP_WRK_6b).

³⁰⁶ GP_ORG_6 INT.

³⁰⁷ Forum Odpowiedzialnego Biznesu, 2024.

³⁰⁸ GP_ORG_6 INT.

³⁰⁹ Added as of 2024 to involve participation from creative industries. See FOB, 2024.

For one Polish telecommunications company, *DINC* was originally regarded as a “*certification exercise*” but it has **since evolved into a strategic operational overhaul**, culminating in initiatives to develop sensory-friendly workspaces and tools for neurodivergent employees. As noted by the interviewee, “*We were aware of neurodivergence, but there were no [current] direct measures until this year.*” Insights from *DINC* participation highlighted underperforming D&I areas, prompting the adoption of a neurodivergent-friendly strategy tailored to employee needs. This approach reportedly **enhanced workplace inclusivity and improved employee retention**³¹⁰.

Similarly, a participating Polish bank cited the *DINC* experience as “*eye opening*” and utilised its insights to **extend their focus beyond physical accessibility**, incorporating digital and material accessibility tailored for individuals with visual and auditory impairments. The organisation used detailed *DINC* reporting to **measure their progress and identify areas requiring attention**. For example, less favourable survey outcomes motivated them to enhance psychological safety for LGBTQ+ employees during gender-transitions. Additionally, the Polish banking organisation launched impactful campaigns, such as addressing gender representation on banknotes, highlighting a dedication to broader (societal) inclusivity³¹¹.

Both participating organisations praised *DINC* as a **catalyst for further innovation**. The Polish banking organisation³¹², for example, was able to transform its previously “*fragmented*” HR efforts into a **cohesive organisation-wide strategy** to target inclusivity based on **data-driven insights** from *DINC*. The success of this approach was greatly facilitated by encouraging **employee-driven participation** and **establishing a culture** where all levels of staff felt acknowledged in their ability to contribute to change. For the Polish telecommunications organisation, the development of Employee Resource Groups (ERGs)³¹³ played a critical role in the organisation being able to ensure any new initiatives targeted the needs of their staff. In this instance, it was the telecommunications organisation’s ERGs that enabled the implementation of sensory-friendly environments. Developing **clear communication channels** were also essential in **translating and disseminating survey findings into actionable practices**, raising **employee engagement** with core issues and **fostering ownership** of D&I efforts.

Challenges to implementing good practices were mitigated through proactive measures, such as **addressing gaps in staff awareness through open communication campaigns**³¹⁴. The importance of **transparency** was illustrated by one representative, stating “*If we have practices and no one uses them, it’s equal to not having practices*”. When a lack of formal D&I training was faced, the Polish banking organisation took the initiative and began **increased participation in regional *DINC*-provided workshops**, allowing them to build their own internal expertise through a “*learning-by-doing*” approach³¹⁵.

8.6.4. Transferability and Lessons Learnt

The transferability of *DINC* lies in its **structured yet adaptable approach** which allows it to meet the needs of diverse organisations and sectors. Its dual status as both a **diagnostic**

³¹⁰ GP_6a_WRK INT.

³¹¹ GP_6b_WRK INT.

³¹² GP_6a_WRK INT.

³¹³ Employee Resource Groups (ERGs) are voluntary collectives that bring together employees sharing common characteristics such as gender, racial or ethnic origin, sexual orientation, disability or other shared experiences (see ManagerHR, 2024).

³¹⁴ GP_6a_WRK INT.

³¹⁵ Ibid.

and educational tool equips participating organisations with **actionable insights** through **comprehensive feedback** and benchmarking. Its methodology, rooted in rigorous standards, ensures relevance across varying sectoral contexts, organisation sizes and types (public, private, NGOs). As evidenced by its 2023 modification to include a creative industry supplement, the *DINC* survey demonstrates a **scalable readiness to address unique sectorial challenges** whilst retaining its intended purpose. Additionally, *DINC*'s *core features* of knowledge sharing, events, workshops, and webinars promotes a collaborative and interactive environment where organisations can exchange best practices and learn from peers.

Both participating organisations emphasised **the importance of businesses having dedicated resources** for D&I related activities, policies and practices to foster equality and implement change. According to one interviewee, “[practices] cannot develop further without someone [being] accountable for it”³¹⁶. Similarly, the Polish banking organisation stressed that **integrating D&I measures into broader corporate structures was essential** in ensuring businesses **remain responsive to changing standards**³¹⁷. Benchmarking and self-assessment, facilitated by initiatives like *DINC*, proved to be critical for progress. For instance, data from *DINC* allowed the Polish telecommunications organisation to **track policy outcomes through regular employment satisfaction surveys**, attaining an 85% participation rate and notable improvements in retention and inclusivity³¹⁸. Equally, the Polish banking organisation used *DINC* data to identify weaknesses in the company’s existing strategies and D&I policies, thus motivating them to develop novel practices such as their expanded accessibility initiatives³¹⁹. Employee feedback and participation were also of great value for both organisations, and ERGs in particular (regarding the Polish banking organisation) ensured that initiatives were employee-driven and accountable.

As both organisations have shown, participation in *DINC* not only leads to **tangible improvements**, but **drives innovation, inclusivity**, and a **broader cultural shift toward sustainable D&I practices**. These features make *DINC* a helpful tool for advancing D&I in participating organisations, and more widely through sharing good practices and examples from best performing organisations.

³¹⁶ Ibid.

³¹⁷ GP_6b_WRK INT.

³¹⁸ GP_6a_WRK INT.

³¹⁹ GP_6b_WRK INT.

8.7. Premios Orgullo COFIDES LGTBIQ (COFIDES Pride Introduction) – COFIDES

8.7.1. Introduction

The *COFIDES Pride Awards* **celebrate individuals and teams who have advanced D&I within the organisation**, particularly in developing, promoting or championing LGBTIQ equality. This initiative forms part of COFIDES' *broader Equality Plan and Diversity Strategy*, guided by national, European, and international legislation³²⁰. Introduced in 2022, the awards have resulted in increased visibility for LGBTIQ employees and allies, enhanced workplace morale, and strengthened COFIDES' reputation as a national and international leader in inclusivity. Through a combination of formal recognition and engaging celebratory events, the awards demonstrate the COFIDES' commitment to embedding diversity as a core value in its culture and operations.

8.7.2. Practice Overview

COFIDES is a Spanish public-private development finance institution supporting sustainable international projects that drive economic growth and create positive social impact. COFIDES' D&I practices aim to ensure a workplace that embraces equity, diversity, and respect, ensuring that all employees feel valued irrespective of their gender, sexual orientation, or other characteristics. This is operationalised through policies and initiatives aimed at eliminating discrimination and promote equal opportunities. As one representative emphasised, "*We don't just talk about diversity; we operationalise it in everything from hiring practices to investment strategies.*"³²¹.

The *COFIDES Pride Awards* were introduced in 2022 as a means of recognising and celebrating individual contributions to LGBTIQ equality. The *Pride Awards* form part of COFIDES' **response to both progressive legal frameworks**, such as Spain's General Law on the Rights of Persons with Disabilities (updated in 2022), and international standards like ILO Convention 190 concerning workplace violence and harassment³²². COFIDES also adheres to the Spanish Diversity Charter, which it signed in 2023, demonstrating its commitment to anti-discrimination principles.

Operating in the Spanish finance sector, COFIDES implemented its LGBTIQ policy in 2019, marking the start of a comprehensive approach to diversity. This policy expanded in 2020 with the signing of the **UN Standards of Conduct** and saw further refinement in 2022 with the adoption of an **Equality Plan** and **membership in REDI**, Spain's leading LGBTIQ diversity network. COFIDES employs 99 staff members, comprising a mix of full-time and part-time employees. A notable demographic feature is the gender balance among senior and technical managers, with women representing 52% of leadership roles and 65% of technical positions³²³. The Equality Plan ensures that all staff—regardless of gender, contract type, or seniority—benefit equally from opportunities, operating under "*a framework*

³²⁰ COFIDES, 2023a; GP_7_ORG INT; GP_7_WRK INT.

³²¹ GP_7_ORG INT.

³²² COFIDES, 2023a.

³²³ COFIDES, 2023b.

to ensure that respect for human rights and non-discrimination are embedded in everyday practices.”³²⁴.

COFIDES’ D&I strategies are **action-oriented**, evident in its regular participation in Diversity Month, which includes visible initiatives such as Rainbow Jumper Day and the *Pride Awards*. The organisation’s policies incorporate additional measures **like gender-sensitive recruitment, targeted training on LGBTIQ equality, and new employee onboarding through a Buddy Programme**. Events like the REDI *Diversity in State-Owned Enterprises Conference*, hosted by COFIDES in 2023, showcase its leadership in D&I discourse³²⁵. These efforts are supported by **clear compliance with legal frameworks** such as Spain’s Law 4/2023 on transgender rights and international instruments like the ILO Convention 111 on employment discrimination³²⁶. The *Pride Awards* are **implemented collaboratively between staff and management**, with the Equality Commission **soliciting nominations through anonymous surveys and employee feedback**³²⁷. Recipients are chosen **based on their contributions to advancing workplace inclusivity**, with the final decision made by a panel comprising leadership and commission members³²⁸. Awards are presented during Pride Month **at celebratory events** featuring **high-level speakers**, including the Spanish Minister of Equality. Following the awards ceremony, informal gatherings like breakfast sessions allow employees to engage in a relaxed setting. This “*blend*” of formal and informal activities ensures both inclusivity and accessibility.

8.7.3. Case study achievements and impact

The *Pride Awards* have achieved both internal and external changes related to **workplace inclusivity, employee morale, and strengthening COFIDES’ reputation**; “*Breaking barriers and allowing people to feel free to be themselves is one of the most impactful outcomes of our DEI initiatives.*”³²⁹ These awards have been instrumental in increasing the **visibility of LGBTIQ employees and community allies**, with the awardees ranging from senior leaders to employees who have openly advocated their support. An example of this, illustrated in one interview, was the recognition of COFIDES’ first openly lesbian employee, an act that **inspired broader cultural acceptance** within the organisation. “*The focus is to give some visibility to gay and allies, to people who work for human rights in the company,*” they explained³³⁰. By **celebrating individuals at all levels**, COFIDES promotes their belief of **inclusion being a shared responsibility for all employees** to engage with.

The awards highlight **the importance of leadership** in driving D&I initiatives. **The CEO’s active participation** in presenting the awards has sent a powerful message about the organisation’s priorities³³¹. Indeed, **having unwavering support** and engagement **from leadership** - and the wider team - was **instrumental in the success of the initiative**. One representative believed that “*The support of the CEO and senior management makes*

³²⁴ GP_7_ORG INT.

³²⁵ COFIDES, 2023b.

³²⁶ COFIDES, 2024.

³²⁷ GP_7_ORG INT; GP_7_WRK INT.

³²⁸ GP_7_WRK INT.

³²⁹ GP_7_WRK INT.

³³⁰ GP_7_ORG INT.

³³¹ GP_7_ORG INT.

everything easier,”³³² reiterating that **visible leadership involvement encouraged widespread employee engagement**. This “*top-down*”³³³ approach was supported and guided by COFIDES’ Equality Commission which **monitors the effectiveness of their initiatives** by collecting **employee feedback through regular surveys and polls**. The most recent survey achieved a 40% staff participation rate and received an overall effectiveness rating of 3.8 out of 4 stars³³⁴.

External recognition from across business sectors has further validated the initiative’s success. In 2023, COFIDES was awarded the ‘*Igualdad en la Empresa*’ mark by Spain’s Ministry of Equality³³⁵ and was also endorsed by the United Nations for its contributions to diversity management³³⁶. These accolades demonstrated the alignment of the Pride Awards with global best practices.

Full participation remains an area for improvement, as only 40% of the workforce attended DEI training sessions in 2023, as reported in the Equality and Sustainability Reports³³⁷. Despite attendance being voluntary, COFIDES are keen to raise participation rates going forward. Further, “*Resistance, especially around language changes, is one of the hardest barriers to overcome*,”³³⁸ particularly regarding the **corporate use of inclusive language**. COFIDES continues to make efforts to address these challenges by **reframing diversity training initiatives as opportunities for personal growth** and ensuring that participation is confidently encouraged and remains flexible to accommodate staff schedules³³⁹.

The financial investment in the awards is modest, with costs ranging from €3,000 to €5,000 annually. This includes expenses for events and materials, such as the €3,000 allocated for breakfast receptions and €500 for awards³⁴⁰. Non-financial costs include the time and effort contributed by the 17 employees who volunteer regularly to plan and implement DEI initiatives.

8.7.4. Transferability and Lessons Learnt

The Pride Awards exemplify how organisations can effectively operationalise inclusivity and adapt D&I practices when **universal support from management and staff is regarded as a priority**. As emphasised by a COFIDES representative, “*leadership support transforms DEI from an abstract goal into actionable policy*,” highlighting the **critical role of visible management involvement**. By **embedding D&I into its internal Equality Plan** and engaging in evident, accessible year-round events, COFIDES has created a sustainable approach to implementing D&I measures with widespread impact.

The success of the awards is rooted in **continuous engagement and collaboration**. By involving employees through surveys, focus groups, and voluntary committees, COFIDES ensures that its **initiatives remain both relevant and responsive** to changing needs. One COFIDES representative explained, “*We mix formal events like panels with informal*

³³² GP_7_WRK INT.

³³³ Ibid.

³³⁴ Data shared by GP_7_ORG. (Not sure how I would reference this as it was an email)

³³⁵ Ministerio de Igualdad, 2024.

³³⁶ GP_7_ORG INT; COFIDES, 2024

³³⁷ COFIDES, 2023b.

³³⁸ GP_7_WRK INT.

³³⁹ GP_7_ORG INT.

³⁴⁰ GP_7_ORG INT.

*celebrations to make the initiative engaging and accessible,*³⁴¹ demonstrating the impact that combining structured activities with informal opportunities for connection can have on promoting broader engagement on D&I aspects within a company.

This initiative is transferable to other organisations, particularly those seeking to find ways to **integrate inclusivity into their core operations and business procedures**. However, *“Each organisation’s DEI strategy must reflect its unique challenges, opportunities, and market. One size does not fit all.”*³⁴²; factors such as organisational culture, sector-specific barriers, and the availability of leadership support **must be considered when adopting similar practices**. Therefore, COFIDES representatives recommended that whilst leadership support and visibility of D&I matters were critical, individual businesses needed to be **cognisant of their own needs, communities, and strategic goals when implementing inclusion policies**³⁴³.

Playing a **visible and exemplary role to other businesses** is also key to success. COFIDES has actively and consistently shared its best practices with other organisations through forums and panels in collaboration with the Spanish Chamber of Commerce and other external institutions³⁴⁴. By **leveraging collaborative partnerships**, such as its membership in the Spanish Diversity Charter and REDI, COFIDES amplifies how effective networking can positively impact and provide resources for other companies aiming to replicate similarly successful strategies in D&I areas.

³⁴¹ GP_7_ORG INT.

³⁴² GP_7_WRK INT.

³⁴³ GP_7_ORG INT; GP_7_WRK INT.

³⁴⁴ GP_7_ORG INT; COFIDES, 2023a.

8.8. Diversity and Inclusion Workplace Awards Programme³⁴⁵

8.8.1. Introduction

An international automotive industry organisation established the D&I Workplace Awards Programme, a central global initiative designed to recognise employees' efforts and initiatives in fostering diverse and inclusive teams. The Awards highlight workers' and teams' success stories from everyday experiences in the workplace, demonstrating the tangible benefits of implementing D&I principles. By celebrating these achievements, the Awards can inspire staff members and other companies.

8.8.2. Practice Overview

The company is a very large supplier in the automotive industry with branches in 43 countries around the world. The company has around 3,000 employees in Slovakia and 150,000 globally³⁴⁶.

In 2019, the company launched the D&I **Workplace Awards Programme**. The initiative is global and involves all branches of the company, which are located all around the world. However, because interviewees for this practice were based in Slovakia, the perspective of how this initiative and D&I policies in general were adapted to the Slovak context will be also considered and described.

The process begins with **a call for nominations at the start of each year across various categories**, such as multiculturalism, age-diverse workplace, women in technology, women in operations, disability-friendly environments, and living by core corporate values. The call for nominees is **translated into local languages** of countries where the business operates, including Slovak and English. Employees submit nominations and must provide a rationale and a story behind each nomination. A committee reviews the submissions and selects winners in each category, with a celebration held to honour them. The nominations address several D&I aspects, such as D&I behaviours that promote diversity, and the benefits of D&I, for instance specific career paths.

While the D&I Workplace Awards Programme is organised at the Group level, and most D&I policies are developed and implemented centrally, national branches can undertake country-specific activities.

In Slovakia, for instance, policies and initiatives focus on improving gender balance in recruitment and on encouraging more women to pursue engineering careers, for instance by promoting dedicated events, such as 'Girls Day'.

A **communication campaign** was also launched in Slovakia by the Slovak branch of the company to enhance understanding among employees of people of different nationalities. The campaign emphasised recognising both the cultural differences and shared values to foster collaboration and respect of cultural differences.

³⁴⁵ Forvia, no date a.

³⁴⁶ Company's website

Additionally, the Slovakian branch provides **training** for recruiters and hiring managers focusing on building diverse teams, breaking biases, and understanding the benefits of D&I³⁴⁷.

8.8.3. Case study achievements and impact

Participation in the D&I Workplace Awards Programme has grown significantly in recent years, with 680 nominations received in 2023 from company branches located in 15 countries³⁴⁸. During the 2019, 2020, and 2021 editions, nominations focused exclusively on women in the workplace. However, the aim of the awards was to encompass a broader range of D&I aspects going beyond gender balance, including multiculturalism, age-diverse workplace, and disability-friendly environments. In 2024, six award categories were introduced, and numerous nominations were submitted globally.

- Women in tech
- Women in operations
- Best Open-mindedness ambassador
- Best Multicultural environment advocate/initiative
- Best Disability-friendly environment advocate/ initiative
- Best age-diverse environment advocate/ initiative

To evaluate the success and achievements of its D&I practices, the company conducts **qualitative monitoring methods at global level**. For instance, the results from an annual employee engagement survey indicate that staff members are satisfied in the workplace. Since 2013, the survey includes four direct questions about D&I³⁴⁹:

- *Do you feel the company will not tolerate behaviour that discriminates against people based on personal background or characteristics? (For example gender, race, background).*
- *To help us understand where we can improve: where, do you feel, the company should focus to demonstrate greater care for employees? Please choose a maximum of two topics (D&I is listed as one of the possible options)*
- *Do you feel that the company values and promotes employee diversity?*
- *Do you feel that in your in your work environment, everyone is treated fairly, regardless of personal background or characteristics?.*

The Group has also set **KPIs focusing on gender diversity**. These include the percentage of women in external recruitment and in managerial positions, which are measured and tracked monthly. The Group aims to achieve 30% representation of women among its top 300 leaders and 35% among managers and professionals by 2030³⁵⁰.

Although the company does not directly measure the impact of diversity on **productivity**, indirect evidence suggests positive outcomes. For example, following the communication campaign focused on addressing cultural differences and shared values among employees of different nationalities in the Slovakian branch, the atmosphere in the Slovakian production plants (employing workers from 23 different nationalities) improved, alongside increased productivity.

³⁴⁷ GP_8_ORG INT.

³⁴⁸ GP_8_ORG INT.

³⁴⁹ Ibid.

³⁵⁰ Ibid.

Challenges

Interviewees identified a general cultural conservatism in the country as a challenge to the acceptance of D&I policies. For example, when the Group began to implement gender diversity KPIs, employees in Slovakia perceived them as “artificial”³⁵¹. Interviewees agreed that open communication between employees and management, as well as employees’ trainings on the topic, were fundamental to address this challenge and to help change employees’ perception on these policies.

8.8.4. Transferability and Lessons Learnt

The D&I Workplace Awards Programme is highly transferable and can be adapted to other workplaces, in particular large organisations, where various departments and teams can serve as role models to others by developing best practices and integrating D&I policies into their daily operations.

According to the company representatives, **open communication** is essential, both internally within the company and externally with other entities and organisations.

Moreover, it is important to consider the specific cultural and socio-economic context of the country where the company operates to ensure the effectiveness and relevance of the programme.

³⁵¹ GP_8_ORG INT.

8.9. *Diversiteit in Bedrijf* (Diversity in Business) - SER

8.9.1. Introduction

Diversiteit in Bedrijf (*DiB* – Diversity in Business) is an initiative targeting the advancement of D&I policies and practices across workplaces in the Netherlands. Managed by the Sociaal-Economische Raad (SER), an NGO advisory body on socio-economic matters³⁵², *DiB* provides businesses with **structured guidance and support** on how to “*embed (and develop) D&I into [their] organisational DNA*”³⁵³. The initiative offers a **comprehensive suite of practical tools and expertise**, including a **platform for knowledge-sharing and cross-organisational collaboration**³⁵⁴. By developing environments where employees of all identities, backgrounds, and abilities are empowered, *DiB* encourages organisations to move beyond superficial diversity metrics to **initiate meaningful, sustainable cultural and structural change**. Its **strategic planning frameworks** and **emphasis on accountability** ensure not only internal transformation but also **broader societal awareness** of the importance of inclusion, making *DiB*, which also manages the Dutch Diversity Charter a cornerstone for workplace equity across public and private sectors in the Netherlands.

8.9.2. Practice Overview

DiB was established in 2015 to advance D&I in workplaces across the Netherlands. A core function of *DiB* is managing the Dutch Diversity Charter, through which member organisations **commit to formalising their D&I policies by drawing up an Action Plan**³⁵⁵. Upon signing the charter, organisations have access to a network that **provides access to webinars, knowledge-sharing sessions**, and an expansive **national and international (EU-wide) community of organisations working** collaboratively on D&I initiatives. Since 2015, there are **now more than 500 Charter signatories benefiting from *DiB*'s support**³⁵⁶. The need for *DiB* was derived by an **increased awareness** for workplaces in the Netherlands to embrace D&I as an **ethical imperative and strategic business necessity** as well as equipping organisations to **meet challenges such as labour shortages and evolving societal expectations**³⁵⁷. *DiB*'s relevance grew significantly in 2020 during the global pandemic and the Black Lives Matter movement, which highlighted the **urgency of addressing systemic inequalities**³⁵⁸. According to SER, “*Diversity without inclusion is incomplete*”, thus regarding *DiB*'s main objective as aiding in businesses adopting practices that create **equitable work environments** where employees feel “*safe and valued*”³⁵⁹. *DiB*'s scope for organisational Action Plans focuses on **strengthening or developing policies** aimed at **improving conditions** across various dimensions of

³⁵² SER, no date c.

³⁵³ GP_9_WRK INT.

³⁵⁴ SER, no date a; SER, no date b; GP_9_ORG INT.

³⁵⁵ SER, no date d; GP_9_ORG INT.

³⁵⁶ SER, no date d.

³⁵⁷ GP_9_ORG INT.

³⁵⁸ Ibid.

³⁵⁹ Ibid.

diversity, including **gender, cultural and ethnic representation, LGBTIQ inclusion, generational diversity, and accessibility for individuals with disabilities**³⁶⁰.

As a facilitating body, *DiB* offers organisations **tailored support** to enhance their D&I efforts, typically via the provision of free resources, practical tools, and strategic frameworks, a method that has ensured **greater accessibility for organisations of varying sizes**, particularly those that might **otherwise lack the budget for consultancy services**. *DiB* also **connects less experienced participants with those further along** in their D&I journey. For one provincial organisation utilising *DiB*'s assistance, this network was **instrumental in learning best practices** from leaders in the field: "*When we encounter a problem, it is really helpful when DiB say: 'Here are some companies that have it working for them.'*"³⁶¹.

A "significant portion"³⁶² of this initiative is its **structured approach to accountability and monitoring**. A *DiB* representative stated that they "require more than just signing a paper as organisations must demonstrate motivation and a willingness to make real change"³⁶³. Participating organisations are **required to articulate their objectives and monitor their progress** towards meeting D&I goals. These are assessed using a **biannual monitor utilising quantitative** (Likert-scale responses) and **qualitative insights** (detailed feedback on success and challenges) to hold organisations accountable, and where appropriate, reformulate Action Plans³⁶⁴.

8.9.3. Case study achievements and impact

The impact of *DiB* has seen participating organisations report **cultural, operational, and structural shifts**. One governmental organisation having benefitted from *DiB*'s support, described the initiative as a "*flying wheel*," initiating **a momentum that helped to reshape and guide their approach**

Changes in the workplace culture

The most noticeable change was reported within workplace culture. Through *DiB*'s guidance and resources, the provincial organisation implemented and coordinated a **company-wide Ambassador Programme** appointing representatives from every department to give visibility and support to critical D&I matters³⁶⁵. This decentralised approach meant that D&I was not restricted to HR or managerial departments, but became a way to ensure that **the whole company attained "A baseline level of D&I"**, a move that became a powerful stepping stone for the evolution of further initiatives like an annual 10-day Diversity Festival, workshops on sign language and inclusive communication, and a keynote speech on social exclusion which attracted 80 participants (double the usual turnout) - "*We are seeing that with each year, more people are coming*"³⁶⁶.

Operational and structural changes

³⁶⁰ SER, no date a; GP_9_ORG INT.

³⁶¹ GP_9_WRK INT.

³⁶² GP_9_ORG INT.

³⁶³ Ibid.

³⁶⁴ GP_9_WRK INT; GP_9_ORG_INT; SER, no date a.

³⁶⁵ Ibid.

³⁶⁶ Ibid.

Beyond cultural shifts, *DiB* encouraged the organisation to **fully integrate D&I into its management structure and daily operations**, guaranteeing that these aspects were not treated as a “*standalone project*” but as a **fundamental aspect of its overall strategy**. A significant focus was placed on the **retraining of managers and staff** on recognising and mitigating problematic thought patterns in order to promote a more **inclusive and equitable hiring process**. “*Managers are being educated on how to not go into their unconscious bias,*” explained the provincial organisation³⁶⁷. These efforts were also being extended to the use of inclusive communication policies, which replaced gendered forms of address with neutral alternatives, such as using “*Dear Reader*” in official correspondence.

These initiatives translated into **visible results**. Although GDPR restrictions prevented the organisation from actively tracking sensitive diversity metrics, anecdotal evidence from the provincial organisation’s interview pointed toward an increased representation of employees of colour and greater inclusion of LGBTIQ and neurodiverse staff, stating that “*Because we acknowledge it, we show that it’s alright to be yourself...if I look around, I do see more people of colour than when I started three years ago*”³⁶⁸. Overall, the organisation believed that their cultural and organisational restructuring around D&I matters **instigated greater levels of retention and employee wellbeing**.

However, embedding D&I into the provincial organisation’s systems required **consistent effort and leadership commitment**, which presented the organisation with some initial challenges. Whilst leadership support for initiatives was strong, **translating executive endorsement into concrete, lasting changes remained a hurdle**, particularly with the concern that embedding D&I into the company’s permanent structure would be **hindered by time and financial restraints**. Externally, **shifting political priorities and reduced government funding posed additional obstacles**. The organisation expressed concerns regarding the changing sociopolitical climate and the potential for resources and investments to be significantly reduced in the future: “*Politics are difficult right now...some subjects are now getting less attention.*”³⁶⁹.

DiB therefore played a **critical role in mitigating these challenges**. By offering organisations structured tools, such as templates for annual planning, free resources (some of which are available to non-members or organisations only in the contemplation stage of joining *DiB*³⁷⁰), and progress monitoring, *DiB* helps organisations to **remain on track and committed to meeting their diversity goals**. *DiB*’s role as a **connector**, linking organisations to share insights and strategies has proven highly valuable to its members. This collaborative approach has allowed participating business to navigate complex matters like legal concerns about privacy and data collection as well as financial and resource constraints in ways that assist in the continuation of their D&I progress.

8.9.4. Transferability and Lessons Learnt

DiB provides a model that **integrates both D&I into organisational strategies**. Key features, such as the development of **Action Plans**, regular progress monitoring, and emphasis on cultural transformation, have been essential for its effectiveness. The structured process, with **clearly defined goals, regular progress measuring**, and providing **tailored guidance**, makes it a reliable model for other workplaces to adapt to achieve **meaningful D&I changes**. As the provincial organisation noted, “*Our methods*

³⁶⁷ Ibid.

³⁶⁸ Ibid.

³⁶⁹ Ibid.

³⁷⁰ GP_9_ORG INT; SER, no date b.

*ensure organisations don't just pay lip service to D&I but implement meaningful change*³⁷¹ illustrating the usefulness of *DiB*'s practical and data-driven approach.

However, *DiB* may require refinement in order to adjust local **socio-political** and **cultural contexts**. For example, **countries with less governmental backing** for D&I might struggle with funding or policy support, so there may be a need to explore alternative models, like partnerships with foundations, trusts or NGOs. Nonetheless, the core principles of *DiB* — establishing actionable, measurable D&I plans and offering guidance and cross-organisational collaborations — offer organisations a reliable and supportive approach to D&I.

Several key lessons have emerged from *DiB*'s implementation:

- **D&I must be an organisational imperative** and must be embedded into the organisation's fabric and daily strategy in order to be successful. It must also be regarded as an ongoing process that is executed in all areas, from recruitment to leadership training and performance reviews. As the provincial organisation stated D&I is "*not a checkbox exercise; it's a lively, ongoing process that requires full integration into business practices*"³⁷² for its longevity and success.
- **Cross-sector collaboration** and networking with other organisations is an essential means of sharing successes and challenges. *DiB* establishes a community of practice that can accelerate learning and allow organisations to implement best practices at a faster rate. The work of *DiB* as a mediator facilitating connection between less experienced organisations and those further along their D&I journey is critical for fostering development and continuous improvements.
- **Clearer frameworks and measurable goals** are essential for motivating participation and holding businesses to account. A data-driven approach allows organisations to identify areas where progress is lacking and adjust accordingly.
- **Leadership commitment and employee engagement** can significantly bolster the success of initiatives. Crucially, it is important that leadership is not only supportive, but actively involved in driving policies as a means of ensuring long-term sustainability.
- **Sustainability beyond initial efforts**, meaning that the organisation must recognise and be in alignment with the notion that D&I requires continual work and adaptation to emerging challenges in order to elicit the best outcomes for employees and business operations.

³⁷¹ GP_9_ORG INT.

³⁷² Ibid.

8.10. Diversity and Inclusion Framework of a large financial company³⁷³

8.10.1. Introduction

The D&I framework of a large financial company has achieved significant progress in developing an inclusive workplace where all employees can thrive. With a focus on measurable outcomes, the framework has driven notable advancements, including increasing the representation of women in top leadership positions from 5% to 42% over the past decade, surpassing industry benchmarks³⁷⁴. These achievements are underpinned by a comprehensive approach that combines strong leadership commitment, robust monitoring systems, and tailored initiatives addressing underrepresented groups. By embedding D&I principles into its business strategy and creating accountability through performance-linked metrics the organisation ensures that its efforts are sustainable and impactful, benefiting employees, clients, and the organisation as a whole.

8.10.2. Practice Overview

The diversity and inclusion (D&I) framework at the organisation aims to encourage a respectful, equitable workplace where all employees are valued and free from bias or stereotypes. The organisation promotes inclusivity by making decisions based on competence and performance while removing barriers for disadvantaged groups. It ensures fair recruitment and provides support for specific employees, such as those with disabilities.

Introduced progressively over two decades, the D&I framework has been shaped to **meet the needs of a global workforce** in the banking, insurance, and real estate sectors. With approximately 180,000 employees across 60 countries, the organisation is committed to implementing inclusive policies that reflect the diverse populations it serves, including **achieving gender balance** and **providing equal opportunities** for underrepresented groups. To achieve this the organisation established a role of the D&I head manager supported by around 40 diversity officers for the whole organisation (corporate group).

The framework encompasses all employees, including full-time, part-time, permanent, and temporary staff. Specific measures ensure fair representation in recruitment, promotion, and training opportunities, with initiatives like tailored job descriptions, partnerships with community organisations, and specialised programmes for underrepresented demographics, including women, ethnic minorities, and neurodivergent individuals.

Implementation involves a **hybrid approach**, combining top-down leadership commitment with local adaptation. **A Diversity Committee meets regularly** to guide policies, and a Validation Committee ensures global alignment of training programmes. **Knowledge-sharing tools**, such as a comprehensive Diversity Book, allow teams worldwide to access and replicate successful practices. **Progress is tracked through metrics**, including gender diversity targets, employee perception surveys, and regular reporting in the Universal Registration Document, ensuring continuous improvement and transparency.

The organisation has implemented a **formal diversity procedure** supported by internal agreements and a pioneering **Global Social Agreement**. This agreement, signed in

³⁷³ The organisation's preference is to be anonymised in this study. It is a large transnational financial corporation.

³⁷⁴ GP_10_ORG INT.

collaboration with the UNI Global Union³⁷⁵, a federation recognised by the International Labour Organisation (ILO)³⁷⁶, establishes comprehensive global standards and principles for D&I. It also incorporates specific metrics to ensure accountability and measurable progress. In effect since 2018, the agreement underscores the organisation's commitment to transparency and continuous improvement, with annual progress reports shared with UNI Global Union to track and evaluate the organisation's advancements in fostering inclusivity.

8.10.3. Case study achievements and impact

The D&I framework at the organisation has achieved significant results, demonstrating the organisation's commitment to fostering an inclusive workplace. A key achievement lies in advancing gender diversity at leadership levels. Over the past decade, the proportion of women on the Executive Committee (Comex) has increased from 5% to 42%, surpassing the average of 28% for the SBF 120³⁷⁷, which represents the top 120 European corporations. This success reflects not only the organisation's commitment to equity but also its strategy of appointing women to business-critical roles, rather than secondary or symbolic positions. These efforts align with broader gender diversity targets set at management levels, monitored rigorously through performance-linked metrics.

The organisation makes use of internal dialogue initiatives for workers to share views on D&I and other aspects that are important to them, and in parallel several bottom up initiatives have been initiated by workers, including networks focussing on women, persons with disabilities, several initiatives related to LGBTIQ as well as sharing expectations for neurodiversity and a more open organisational/company culture. Mandated budgets have been allocated to addressing legal/regulatory requirements such as for workers with disabilities and female workers and the organisation's HR and CSR also allocate funding to other initiatives. When the Work-life balance Directive (Directive EU 2019/1158) was transposed in 2023, the organisation actively reached out to workers regarding their parental rights and encouraged fathers (second parents) to take the non-transferable part of parental leave.

Monitoring and assessment are integral to the organisation's approach. Since 2009, the organisation has conducted biennial employee perception surveys, capturing insights into how D&I are experienced at all organisational levels. These surveys ask questions such as, "Do you feel you can be yourself without worrying about being judged?" and provide qualitative data to guide improvements. Additionally, quantitative metrics, such as gender representation across recruitment and management, age distribution, and national diversity, ensure that progress is both measurable and transparent. The organisation also tracks localised indicators in regions where specific data, such as ethnic diversity statistics, can be legally collected.

However, some challenges remain, such as for example, employees may hesitate to disclose personal information, including sexual orientation or disabilities, even when legal protections are in place, due to concerns about stigma. For instance, LGBTQ+ employees entitled to parental recognition under French law might not claim their rights if the working environment feels unwelcoming. Similarly, employees with disabilities might avoid disclosing their needs, such as mobility aids or flexible schedules, which could impact their productivity and engagement. The organisation addresses these challenges by fostering an inclusive culture through awareness campaigns and training. Tailored programmes and

³⁷⁵ UNI Global Union, no date.

³⁷⁶ International Labour Organisation, no date.

³⁷⁷ The SBF 120 (Société des Bourses Françaises 120 Index) is a French stock market index.

barometers targeting aspects like sexism and LGBTQ+ inclusion further help identify and mitigate barriers.

The organisation's success is rooted in strong leadership commitment to D&I, which drives the integration of D&I into the business strategy. The organisation links managerial remuneration to D&I goals, ensuring that managers are held accountable for progress. Specific D&I indicators help measure this progress, directly influencing their rewards. By embedding D&I goals into managerial remuneration, the organisation ensures that progress is tied to accountability. Its structured framework, including the Global Social Agreement and extensive reporting mechanisms, enables consistent alignment with international standards. This comprehensive approach not only strengthens employee well-being but also enhances the organisation's ability to mirror the diversity of its global client base, ensuring long-term impact and sustainability.

8.10.4. Transferability and Lessons Learnt

The D&I framework implemented by the organisation demonstrates significant potential for transferability to other organisations and contexts. The success of this example stems from its hybrid approach, combining **top-down global governance with bottom-up local adaptation**. Global committees provide a **structured framework**, set policies, and validate actions, while local teams tailor these initiatives to meet country-specific needs and legislative requirements. This approach ensures **consistency in principles while allowing for flexibility in implementation**, making it highly adaptable across different sectors and regions.

A key lesson learnt from the organisation's experience is **the role of leadership commitment**. Visible support from the CEO and executive committee, anchors the D&I agenda as a strategic priority, ensuring alignment with business goals and fostering a culture of accountability. The organisation's emphasis on integrating D&I metrics into managerial remuneration further reinforces the importance of these initiatives and creates a performance-driven incentive structure that can be replicated elsewhere.

Another important takeaway is the value of transparent governance and knowledge sharing. The organisation's Diversity Book serves as an effective tool, enabling global teams to access information about successful initiatives, collaborate across borders, and avoid duplication of efforts. This system not only promotes innovation but also builds a sense of collective responsibility for driving progress.

Challenges such as addressing unconscious bias and ensuring inclusivity in practice require sustained attention. The organisation mitigates these obstacles through continuous awareness training and targeted initiatives to support underrepresented groups. The organisation's focus on understanding "who is missing in the room"³⁷⁸ during decision-making highlights a proactive effort to identify and address gaps in representation and participation.

By embedding D&I within its broader business strategy and tailoring actions to local contexts, the organisation provides a model for other organisations to emulate. Its ability to balance global principles with local adaptability ensures relevance and effectiveness, making this framework a compelling blueprint for businesses seeking to implement impactful and sustainable D&I practices.

³⁷⁸ GP_10_ORG INT.

8.11. Dissemination of good practices through different channels - Fundación Diversidad

8.11.1. Introduction

Since its foundation in 2009, Fundación Diversidad³⁷⁹ has been actively promoting and supporting the implementation of D&I policies among companies and public institutions in Spain. The organisation is committed to disseminate D&I good practices through various channels, **including training sessions and webinars, communication campaigns, networking activities and D&I awards**. Key success factors include **leveraging new technologies**, such as a well-designed website and online events, to broaden outreach and accessibility, alongside **fostering partnerships with role model organisations** to inspire peer-to-peer learning. **Simplifying processes** with ready-to-use tools and adapting strategies to local contexts ensure broader participation and effective implementation of D&I initiatives.

8.11.2. Practice Overview

Fundación Diversidad is a Spanish organisation that manages the Diversity Charter in Spain. Based in Madrid, it collaborates with organisations from all regions in the country. The organisation is responsible for promoting and implementing the Diversity Charter in Spain among businesses and public institutions.

Fundación Diversidad conducts a variety of activities to promote and disseminate D&I, considering diversity from a broad perspective. It advocates for the inclusion of people of different ages, origins, genders, and sexual identities. Its efforts focus on various aspects of business operations, in particular recruitment, talent retention, and supplier diversity. The supplier diversity concept refers to companies establishing and holding contracts with other businesses that are also committed to D&I. Additionally, the organisation **considers diversity in the marketing of products and the development of new products**, such as ensuring accessibility in product design for people with disabilities.

Trainings and webinars³⁸⁰

Since 2020, the organisation has conducted around 6 training sessions per year for the Charter's signatories. The trainings focus on specific good practices in various aspects of D&I, including:

- Age inclusion
- Disabilities
- Women in managerial positions
- LGBTIQ
- Employees resource groups
- Work-life balance
- Supplier diversity

During the training sessions, one or two selected companies share their good practices on the specific topic. Recordings of the trainings are made available on YouTube allowing people to watch them at their convenience.

³⁷⁹ Fundación Diversidad, no date a.

³⁸⁰ Fundación Diversidad, no date b.

Additionally, companies can enrol their employees in an **online course about unconscious bias**³⁸¹: While the organisation manages the course, companies can decide when their employees start it and handle organisational aspects. The course is designated to be easy and flexible, and, to date, 4000 people have participated in it.

Communication campaigns

The organisation has carried out two highly successful communication campaigns focused on disseminating good practices.

- 1) Campaign for non-discrimination at work (1 March 2024): This campaign, in collaboration with the Spanish Ministry of Foreign Affairs, took place on the national day of non-discrimination at work (1 March). Around 10 good practices were selected covering various D&I aspects, such as age, gender, physical appearance, LGBTIQ, racial or ethnic origin, and disabilities. The organisation created flyers, images and videos for use on social media and websites. Participating companies could add their logos and use the materials to demonstrate their commitment to combating workplace discrimination and promoting inclusion. Fundación Diversidad published these good practices on its website and disseminated them via a newsletter reaching approximately 8000 contacts.
- 2) Pride campaign (June 2024): During Pride Month in 2024, the organisation launched a campaign focused on LGBTIQ inclusion, showcasing around 10 good practices.

Creating connections among companies

Fundación Diversidad has observed that many organisations were reaching out to them with a common concern asking whether others were facing similar challenges and how these challenges were addressed. One example involved employees with invisible disabilities, such as neurodivergence, who often choose not to disclose their condition due to fears of being treated differently. This reluctance can result in missed opportunities to provide support and foster inclusivity. To address this issue, some organisations have launched internal campaigns to create a safe and supportive environment, empowering employees to feel confident and motivated to share their experiences.

To further assist, Fundación Diversidad facilitates connections between companies, enabling them to exchange practices and insights. By fostering collaboration, organisations can learn from one another's strategies and build stronger, more inclusive workplaces. Additionally, Fundación Diversidad hosts events throughout the year focused on specific topics, providing a platform for companies to share experiences, discuss challenges, and explore innovative solutions together.

Fundación Diversidad Awards³⁸²

The Fundación Diversidad Awards, established in 2014, recognise organisations and individuals committed to D&I. These awards **honour achievements across various categories**, including SMEs, large companies, NGOs, public institutions, public enterprises, and the Spanish Special Employment Centres (where at least 70% of the staff must have recognised disabilities). Additionally, a special award is reserved for an individual or group making a significant impact in advancing D&I.

To participate, companies must complete **a comprehensive questionnaire detailing their workforce demographics**, such as the proportion of women in leadership roles, LGBTIQ representation, and the share of employees with disabilities, along with their D&I policies. High-scoring companies advance to the finals, where they present their most impactful

³⁸¹ Fundación Diversidad, no date c.

³⁸² Fundación Diversidad, no date d.

workplace inclusion project. A jury then evaluates these projects and selects the winners. NGOs, due to their smaller scale, focus exclusively on presenting a standout project.

8.11.3. Good practice achievements and impact

The initiative has generated significant impacts, as evidenced by **the results of a 2023 survey** conducted among the Charter signatories. Over 100 companies responded, highlighting that the most valued aspects of the initiative are the trainings, webinars, and the exchange of good practices. Organisations particularly appreciate learning from real examples of how other entities address shared challenges with innovative approaches, which can inspire them to adopt similar strategies.

Quantitative metrics are used to measure the initiative's outreach and success. Attendance at webinars and events, along with the number of views on YouTube and visits to various pages of the updated website, serve as tangible indicators of engagement. Since the website was modernised and enriched with new content in 2022, visitor numbers have increased significantly. Social media activity is another metric, including the number of likes and views on posts across platforms such as Instagram, LinkedIn, X, Facebook, and YouTube, where new content is shared almost daily. A high engagement level could indicate that organisations are aware of and actively engage with the posted materials and examples. Therefore, it could be assumed that they are making use of this content within their organisations.

Several factors have contributed to the success of this initiative³⁸³. **Flexibility** is a cornerstone, ensuring that even busy companies can participate and engage. **Webinars are recorded and made available for on-demand viewing**, allowing participants to learn at their convenience. **Communication campaigns** are designed to be **simple for companies to implement**. Pre-prepared materials, including hashtags and texts tailored for each social network, make implementation straightforward and efficient.

A proactive approach to information sharing has also been instrumental. **A curated database**³⁸⁴ of publications and studies on D&I is available on the website, organised by topic for ease of use. **Monthly newsletters** keep companies informed, while **an online guide** published this year offers practical advice for new signatories, including templates for employee communications and social media posts.

One of the challenges faced by organisations is that many companies, especially smaller ones, lack dedicated personnel to focus on D&I matters, and busy schedules limit participation in training sessions. To address these challenges, **the initiative prioritised accessibility and efficiency**. By providing ready-to-use materials and recorded webinars, companies can engage without needing significant additional resources or time.

These measures ensure that even organisations with limited capacity can benefit from the initiative, fostering broader participation and a more inclusive impact across a diverse range of companies.

8.11.4. Transferability and Lessons Learnt

The practice has strong potential for transferability to other Diversity Charters and other organisations promoting and enhancing D&I policies and practices. A key takeaway is **the importance of leveraging new technologies to broaden outreach and engagement**. A

³⁸³ GP_11_ORG INT.

³⁸⁴ Fundación Diversidad, no date e.

well-designed website, active social media presence, and online events significantly extend the reach of D&I initiatives. While in-person events remain valuable for fostering deeper connections, incorporating streaming and online content ensures accessibility for a wider audience, particularly for companies with limited time or resources.

Another critical element is **the involvement of strong partners**: companies with exemplary D&I practices that can serve as role models. By highlighting successful examples and encouraging peer-to-peer learning, these partnerships inspire other organisations to adopt and adapt effective D&I strategies.

Simplifying the work for companies by **providing ready-to-use tools and materials**, such as communication templates and pre-packaged resources, is also essential as it reduces barriers to participation and enables organisations to implement D&I initiatives more efficiently.

It is important to note, however, that every country operates within a unique context. Legal frameworks, cultural norms, and workplace dynamics differ significantly across regions. For example, Spain's specific D&I legislation and social realities may not fully align with those of other EU countries. Organisations must adapt their tools, messaging, and practices to align with the specific needs and realities of each country to ensure successful transferability and impact.

8.12. Business Uniting Talents 2030 - Prince Philippe Fund/ AXA Insurance

8.12.1. Introduction

The Prince Philippe Fund³⁸⁵ established in 1998 as part of the King Baudouin Foundation, has long been a champion of fostering dialogue among Belgium's diverse ethnic communities. In 2021, the Fund, in collaboration with the Business Uniting Talents 2030 (BUT 2030 Project)³⁸⁶, took steps toward trying to **address ethnic minority under-representation** in the Belgium workforce. The aim of the partnership was to develop a more forward-thinking and scalable approach to tackling socio-demographic shifts and labour market challenges with innovative solutions to embed D&I into the operational fabric of Belgian businesses.

8.12.2. Practice Overview

Belgium faces significant challenges in integrating ethnic minorities into the workforce. Nearly 30-40% of the population identifies as part of an ethnic minority, yet employment rates for these groups lag 20% behind the national average³⁸⁷. These stark disparities place Belgium among the EU's poorest performers in labour market integration, as highlighted by recent OECD studies³⁸⁸.

The BUT 2030 Project³⁸⁹ emerged in response to this pressing matter, launching in 2021 with the aim of bridging these gaps to foster multi-cultural D&I, reduce inequalities in access to employment opportunities and build new inclusive business models. Its inception was driven by a confluence of factors, including rising migration from Northern and Sub-Saharan Africa, the absence of legislative frameworks to guide D&I efforts in the private sector, a labour market under strain from an aging workforce and widening skills gaps. Recognising the growing need for inclusive employment practices, the project sought to **build on academic research while creating practical frameworks** for businesses.

In the initial launch phase, between October 2020 and March 2022, nine leading companies in Belgium (Axa, AGC, Atelier Jean Regniers, Engie, Janssen, L'Oréal, Port of Antwerp, Solvay and Telenet) came together to **identify and develop frameworks, templates and workstreams to support initiatives** that would address perceived gaps in private sector D&I policy. The oversight and thought leadership of Belgium's largest corporate enterprises was recognised as a critical step in developing, supporting and bringing scale to the project.

8.12.3. Good practice achievements and impact

From the outset, the main focus of the initiative was to enable participating companies to assess the current state of their D&I policies. To achieve this an **Ethnic D&I Assessment**

³⁸⁵ De Belgische Monarchie, no date,

³⁸⁶ CSR Europe, no date.

³⁸⁷ National Bank of Belgium, no date.

³⁸⁸ OECD, 2023.

³⁸⁹ CSR Europe, no date.

Tool and Business Model³⁹⁰ was created as the cornerstone of the BUT 2030 Project. This tool offers companies a structured method to evaluate and benchmark their current D&I practices and to identify areas for improvement. Its design emphasises **three key pillars** and phases: **strategic commitment, effective management processes, and ongoing rigorous measurement**. This model of self-assessment and benchmarking gives a clear indication of the current state of D&I practices within an organisation as a critical starting point. Companies participating in the programme also **gain access to personalised reports, providing actionable insights** into their diversity landscape.

The D&I Assessment Tool generates tailored and anonymized benchmarking reports, helping organisations to:

- Evaluate their current D&I practices;
- Identify gaps and develop targeted pilot projects; and
- Foster improvements through policy advocacy, employee engagement, and industry sector collaboration.

The process not only highlights gaps but also gives support in the planning and implementation phase of pilot activities to overcome downfalls identified in the assessment, overseen by a task force of D&I specialists. **A Best Practice Booklet and toolkit is also provided to showcase examples** of successful inclusive business processes to encourage the adoption of more diverse recruitment strategies, targeted upskilling programmes, and creation of more open channels of communication across the company. A key part of the framework included in these initiatives has been to establish Employee Feedback Committees to support and gather together workers from outside the EU to discuss challenges, give feedback and make recommendations.

As the project gained traction it became evident that there was a varied level of maturity towards D&I policy across different industry sectors and also between Enterprise and SME companies. The role of sector federations as project stakeholders was therefore seen to have practical potential to be even more influential and effective across this spectrum. As a result, a secondary phase of the project was developed to create a new 'sector support' workstream. The primary project initiatives previously outlined were further developed to create a Multi-Cultural Diversity & Inclusion Checklist targeted at SME's, a sectoral blueprint for D&I and further creation of sector level Employee Feedback Committees to provide more comprehensive feedback on policies across entire industries. Training programmes were also developed to arm industry federations with the right tools and knowledge base to promote Multicultural Diversity & Inclusion in their business networks with the aim to achieve further and more impactful results for the now 30 companies currently participating³⁹¹.

The nascent project's impact has been encouraging. Companies that have embraced its principles, report enhanced employee satisfaction, particularly among underrepresented groups, as well as noticeable progress in increasing ethnic minority representation in leadership roles³⁹². Participants in the project believe that culturally, workplaces in Belgium are becoming more open to discussions on diversity, creating an environment where employees feel more valued and empowered to contribute³⁹³. It is believed that these cultural shifts will, in time, drive tangible business outcomes, including improved innovation,

³⁹⁰ CSR Europe (no date).

³⁹¹ CSR Europe (no date).

³⁹² GP_12_WRK INT.

³⁹³ GP_12_ORG INT.

stronger alignment with diverse markets, and increased customer satisfaction as the socio-demographic landscape in Belgium evolves³⁹⁴.

Recognition has been a crucial motivator in sustaining these efforts. High-profile events, such as award ceremonies at the Royal Palace, provide public acknowledgment of companies' commitments, inspiring continued participation and engagement. The initiative's collaboration with sector federations further amplifies its reach, fostering knowledge-sharing and collective action across industries³⁹⁵.

8.12.4. Transferability and Lessons Learnt

One of the most notable aspects of the BUT 2030 Project is its **adaptability**. The initiative's tools and methodologies are designed to be scalable, making them applicable to both SMEs and multinational corporations. By **centring the approach on company benchmarking and employee feedback**, the project ensures that **its strategies remain relevant and grounded** in real workplace experiences. Resources such as the Best Practice Booklet and pilot activity support mechanisms offer practical guidance for other organisations looking to replicate its success³⁹⁶. Interviewees acknowledged that the ongoing engagement and support of both senior leadership and industry sector federations are paramount in sustaining momentum and delivering quantifiable progress³⁹⁷.

While the programme has achieved milestones, it has also encountered challenges. Resistance to change, resource and budgetary constraints, and deeply ingrained cultural biases have posed obstacles. However, the initiative has addressed these barriers through targeted training programmes, strategic resource reallocation to sector federations and increased focus on employee networks to drive a culture of inclusivity in the programme itself. The engagement of high-profile cultural figures, industry leaders and sector federations has been particularly instrumental in overcoming these challenges, towards creating a network and culture of shared learning and mutual support³⁹⁸.

³⁹⁴ Ibid.

³⁹⁵ Ibid.

³⁹⁶ GP_12_WRK INT.

³⁹⁷ GP_12_WRK INT; GP_12_ORG INT.

³⁹⁸ GP_12_ORG INT.

8.13. D&I in a global organisation - Oracle

8.13.1. Introduction

Oracle Corporation, one of the world's leading software companies, has embedded Diversity and Inclusion (D&I) into its organisational culture and operations. With its headquarters in Austin, Texas, Oracle serves as a global technology leader, offering database software, cloud computing services, and innovative technological solutions. The company's D&I practices reflect a robust and intentional approach to addressing systemic inequities while promoting inclusivity across all levels of its global workforce. Operating in over 60 countries, Oracle faces unique challenges due to cultural and legal variations, but its initiatives aim to foster meaningful and measurable progress in D&I.

8.13.2. Practice Overview

With an extensive global footprint, the company is required to navigate diverse cultural, legal, and regulatory landscapes to implement its D&I initiatives effectively.

Oracle has embraced D&I as a core business priority, recognising that creating an inclusive environment is not only **ethically responsible but also strategically beneficial**. The company acknowledges that diversity fuels innovation, enhances problem-solving, and strengthens its ability to serve an increasingly global and diverse customer and employee base. Oracle's D&I strategies are now deeply embedded into its organisational structure, with clear alignment to its broader business goals. To ensure that D&I policies and practices are focussed and deliverable, Oracle has mandated that senior and middle management leadership at all levels is **held accountable** to their implementation, with behaviour-based D&I objectives **integrated into performance evaluations alongside financial targets**, ensuring that inclusivity becomes a shared responsibility across the organisation. Oracle believes that their approach goes beyond just meeting diversity quotas or superficial compliance towards focus over time on creating meaningful, measurable change by addressing systemic barriers to inclusion. To achieve this end, Oracle prioritises the use of its own data to measure the effectiveness of all of its D&I programmes and has **developed an in-house HR Tool** to track every aspect of inclusivity in its employee base³⁹⁹.

Oracle understands the need to build a workplace culture where all employees feel valued and empowered. One of the most successful initiatives has been the Gen O programme⁴⁰⁰, which aims to broaden access to careers in technology for underrepresented groups. It has also **invested significant support and resources into Employee Resource Groups (ERGs)**, to foster employee collaboration across intersecting identities both within the company and externally in the communities in which they have business operations. As outlined above, its use of advanced **HR technology to track progress and provide actionable insights** underscores its commitment to using data-driven strategies to achieve its D&I goals.

By integrating D&I into recruitment, talent development, and community engagement, Oracle has positioned itself as a leader in inclusive business practices. Its efforts not only

³⁹⁹ GP_13_ORG.

⁴⁰⁰ Oracle, no date b.

address the immediate need for a diverse workforce but also contribute to long-term business resilience and societal impact, setting a high standard for other organisations to emulate⁴⁰¹.

8.13.3. Good practice achievements and impact

Oracle has implemented several innovative practices to embed D&I into its core operations. One of its most notable achievements, outlined above, is **the Gen O Programme**⁴⁰², which aims to redefine recruitment practices by targeting untapped talent pools. This initiative provides **a one-year training programme** for participants regardless of prior qualifications or experience and equipping them with foundational skills in technology and business. The programme **pre-defines a 50/50 gender balance** and then integrates participants into cross-functional teams, thereby exposing them to Oracle's broader ecosystem. Its impact has been significant, with participants diversifying team dynamics and challenging stereotypes about the tech industry. Most notable of its success is the strong retention rates of participants in the programme who remain at the company, indicating the programme's success in establishing long-term employee satisfaction and engagement⁴⁰³.

Another key initiative is the use of **Employee Resource Groups (ERGs)** to address intersectionality and foster collaboration among diverse employee groups. These ERGs focus on real community needs, working across areas such as disability awareness, neurodiversity, and LGBTIQ advocacy. By encouraging collaboration among different ERGs (eight in total), Oracle builds a culture of inclusivity within the company itself while ensuring its D&I efforts address a broad spectrum of issues externally within the community. This approach enhances employee belonging, strengthens external partnerships, and reinforces Oracle's reputation as a socially responsible employer⁴⁰⁴.

As already outlined, Oracle also integrates D&I into leadership accountability. All managers have behaviour-based D&I goals tied to their performance metrics. This ensures that leadership is actively engaged in fostering inclusivity and driving cultural change from the top down. Additionally, initiatives like reciprocal and reverse mentoring schemes enhance cultural understanding and collaboration across different levels of the organisation. Oracle measures the success of its initiatives through a combination of data tracking, employee feedback, and business metrics. These include retention and growth of diverse employees, innovation outcomes, and team performance improvements⁴⁰⁵.

A Gig Model is applied to each inclusion project. It is a flexible and dynamic approach to staffing for D&I initiatives. This scalable model addresses the fluctuating demands of certain projects or periods of activity without requiring full-time, permanent hires for each task. It offers flexibility, allowing individuals to balance these roles with their main jobs or personal commitments, while gaining new skills. It encourages diversity by bringing fresh perspectives and promotes knowledge sharing. This approach is cost-effective, as it provides expert help without overburdening full-time staff⁴⁰⁶.

⁴⁰¹ Oracle, no date a.

⁴⁰² Oracle, no date b.

⁴⁰³ GP_13_ORG INT.

⁴⁰⁴ Ibid.

⁴⁰⁵ Ibid.

⁴⁰⁶ Ibid.

8.13.4. Transferability and Lessons Learnt

Oracle's D&I framework offers a replicable model for other organisations seeking to implement inclusive practices. Its focus is on creating and measuring behavioural change over time instead of trying to meet arbitrary diversity quotas, coupled with effective leadership engagement to ensure scalability and adaptability. The use of technology as a central tool for monitoring progress and providing actionable insights is particularly noteworthy, as it enables data-driven decision-making.

Several lessons emerge from Oracle's experience:

- **Legal and Cultural Adaptation:** Organisations must navigate varying legal regulations and cultural contexts while ensuring compliance and inclusivity.
- **Leadership Accountability:** Engaging both senior leadership and middle management is critical for success. Performance objectives tied to D&I outcomes ensure sustained commitment.
- **Inclusive Programmes:** Initiatives like the Gen O Programme and ERGs show the importance of targeting underrepresented groups and fostering collaboration across diverse communities.
- **Flexibility in Execution:** Oracle's gig model, which uses a dynamic staffing approach for D&I initiatives, highlights the value of flexibility and resource optimization.
- **Behavioural Change Focus:** Emphasizing inclusion behaviours over numerical diversity targets drives sustainable cultural transformation.

These practices can be tailored to other workplaces, provided they are aligned with local laws and cultural norms. Oracle's focus on measurable outcomes and long-term engagement ensures that its D&I initiatives are not only impactful but also scalable and sustainable⁴⁰⁷.

⁴⁰⁷ GP_13_ORG INT.

8.14. Diversxs con sello propio (Diversity with their own stamp) - Correos

8.14.1. Introduction

Correos is the national postal service of Spain and is a state-owned public limited company headquartered in Madrid⁴⁰⁸. Correos employs a range of management tools to encourage D&I. These include their **D&I calendar, diversity plan, equality plan, and the framework and collective bargaining agreement**. These allow Correos to *“have an ordered set of measures that diagnose, analyse, execute, correct, improve and monitor the actions carried out with the aim of achieving diversity and real and effective inclusion.”*⁴⁰⁹ Over 2023, Correos carried out over 130 D&I actions, and identified the benefits of managing D&I such as an improved working environment, more creativity and innovation, a greater sense of belonging, a better corporate reputation, and the ability to attract diverse talent.

8.14.2. Practice Overview

Correos began in 1716 as a national public service. It is now the *‘main company in the Spanish postal market and one of the main operators in the e-commerce services sector’*⁴¹⁰.

D&I can be an ongoing process, that is formalised over a period of several years.

Correos has gradually developed their D&I work, beginning in 2011 and consolidating the five areas of diversity that their Diversity covered by 2019.

- Correos began their work on D&I in 2011, with their equality plan and complying with the General Law on Rights of Persons with Disabilities and their Social Inclusion⁴¹¹.
- In 2014, Correos noted that efforts in generational diversity were called for.
- In 2017, Correos launched their Diversity Index, a project where Correos assessed and identified that it could undertake a global diversity project. As a result, Correos established their D&I plan.
- In 2019, Correos added LGBTIQ diversity, consolidating their five dimensions of diversity work: Gender, generational, persons with disabilities, cultural and LGBTIQ.

The driving forces were the need as a public company to manage diversity in its 48,600+ employees, to guarantee the principle of equality and non-discrimination, equal opportunities and treatment, inclusive work environments that respect differences. In addition to **complying with the legal requirements established in Spain** and developing their own Diversity Plan, Correos have committed to external D&I initiatives. For example, they are a Signatory of the Spanish Diversity Charter (Fundacion Diversidad), committed to the United Nations LGBTIQ standards of conduct⁴¹², are a member of the *Red Empresarial por la Diversidad e Inclusion LGTBQI+ (REDI) (Business Network for Diversity and*

⁴⁰⁸ Grupo Correos is made up by Correos and the affiliated companies Correos Express, Correos Express Portugal and Correos Telecom. Grupo Correos is owned by the Sociedad Estatal de Participaciones Industriales (SEPI), the Spanish state-owned industrial holding company.

⁴⁰⁹ GP_14_ORG INT.

⁴¹⁰See: Senator - Correos (Spain), Accessed 2024.

⁴¹¹ The Royal Legislative Decree 1/2013, the General Law on Rights of Persons with Disabilities and their Social Inclusion. See: Boletín Oficial del Estado, 2013.

⁴¹² See: United Nations Human Rights Office, Accessed 2024.

Business Network for D&I LGBTQI+)⁴¹³. Correos also took part in the ‘*Target Gender Equality Accelerator*’ programme, an initiative organised by the United Nations Global Compact, which aims to help companies to achieve equal representation, participation and leadership in business and achieve equal pay for work of equal value⁴¹⁴.

The **Diversity Plan is Correos’ key instrument for managing D&I**. Correos’ Diversity Plan covers five dimensions of D&I (gender, age, disability, cultural and LGBTIQ). All the initiatives are developed based on seven lines of action (Promotion and Recruitment, Training, Talent, Culture, Healthy Company, Social Responsibility and Communication). The initiatives are carried out in a transversal and global manner, as set out in their **Diversity Agenda**. From each line of work, Correos derive a **general work objective and sub-objectives** related to each dimension of diversity⁴¹⁵. This translates into the actions that are carried out.

Correos’ Diversity Agenda is:

- **Transversal**: as it impacts all areas of the company;
- **Global**: as it works with the different dimensions of diversity; and,
- **Social and committed**: with internal and external initiatives that support D&I.

Examples of Correos’ D&I initiatives are provided below, structured according to the seven lines of action referred to above.

Promotion and recruitment

Correos apply the principle of equality and non-discrimination in all job offers and these principles are incorporated throughout their recruitment process, for instance, inclusive language in their job offers. Further mechanisms in place to ensure for example, gender equality in the selection process include:

- Developing an action plan with measures to encourage women to apply for positions of greater responsibility;
- Ensuring there is no bias;
- Monitoring the percentage of men and women who apply for job vacancies at all stages of the process;
- Investing the necessary efforts in seeking candidates to be able to present gender parity in final shortlists. This is only carried out when needed (for example in predominantly male labour markets), and always respecting the established requirements and the criteria of merit and capacity; and
- Asking that suppliers comply with ethical criteria.

Training

Correos is committed to the development of their employees and D&I and provides a range of training opportunities responding to the training needs of D&I. In 2023, there were 1.2 million training hours. Training opportunities include:

- Training on unconscious bias for **recruitment staff**, among others.

⁴¹³ Correos have offered their staff information, video learning opportunities and a workshop on unconscious bias on LGBTI which was organised by REDL.

⁴¹⁴ Contributing to Social Development Goal 5 and 8.5 respectively. See: United Nations Global Compact, no date.

⁴¹⁵ For example, the objectives to offer training specifically on equality & revision of the anti-harassment protocol and adjusting it to sexual identities in accordance with legal regulations.

- A compulsory course on DEI for **all staff**, which includes practical cases that are grounded in Correos' reality such as how to manage day-to-day work related to D&I with regards to both colleagues and customers⁴¹⁶; and
- Training for all staff on inclusive language, unconscious biases, female empowerment, work-life balance and co-responsibility (including co-responsibility between genders and tools to promote co-responsibility), gender violence, etc.

Training and awareness-raising tools are available to all Correos employees to make DEI a reality. The training offered is provided in a **range of formats** to facilitate inclusion and access to the content, for example, through e-learning, mobile learning and on paper.

Talent

Correos guarantee the principle of equality and non-discrimination and deploy their strategy to attract diverse talent through their Value Proposition and employee experience. To promote the development of their staff, Correos carry out:

- **Mentoring and Cross Mentoring:** This is part of Correos strategic pillar to continue developing talent and leadership (improving skills, abilities and competencies) through the exchange of knowledge and experiences. The Cross Mentoring scheme has been running for six cohorts and has had 50 participants to-date. Participants' opinion of the scheme is surveyed, with a current satisfaction index of 9.33 and a recommendation index of 9.06 out of 10.
- **'Programa Clic': 'Correos en femenino' (Women's Correos) and 'Charlas STEM' (STEM talks).** As part of talent development, Correos carries out actions aimed at **promoting female talent** (e.g. encouraging female staff to apply for roles in under-represented areas). Within the 'Programa Clic' and the project 'Correos en Femenino', are the Charlas STEM, which further contribute to fostering female talent. As part of these talks, Correos' female STEM professionals visit and give talks in secondary schools and universities. One of the aims of the Charlas STEM is to contribute to the creation of women's role models and inspire students⁴¹⁷. Through this work, Correos are also responding to future developments, where technology is increasingly relevant, and STEM applicants are needed. Correos have launched a campaign to raise the profile of this initiative by participating in various studies, benchmarking and congresses on best practices⁴¹⁸. In Charlas STEM, 30 women have participated, with more than 1,000 students and more than 20 talks.
- Within **generational diversity**, Correos has the 'Senior Talent route', within which there are extended development programmes from the age of 58 to retirement age. Initiatives include individual and group sessions, reverse mentoring⁴¹⁹, and buddy mentor assignments for the development and monitoring of action plans, and conversations with Senior Talent and training to improve health.

Culture

D&I actions under culture include:

- A **commitment to the use of inclusive language**. Correos have produced guides on this subject and have disseminated explanatory infographics that provide information on

⁴¹⁶ In more detail, the training course aids staff to: understand concepts such as real equality and gender equality, promote the integration of the gender perspective, identify and combat unconscious biases, learn about the Equality Plan and its application, acquire inclusive communication tools, learn about the dimensions of diversity, study real cases of labour management and equality, and carry out exercises to promote equality and diversity.

⁴¹⁷ See: Equipos&Talento, 2024.

⁴¹⁸ For example, see: Fundación Diversidad, 2024.

⁴¹⁹ Reverse mentoring has been employed in companies such as Linklaters and PricewaterhouseCoopers in order to improve leaderships' understanding of minority issues. See: *Harvard Business Review*, 2019.

diversity and the use of inclusive terms that are free of prejudice and negative connotations, with the aim of promoting respect.

- **Mechanisms to combat the pay gap.** For example, Correos publish and update salary tables on an annual basis. This has contributed to attracting and managing talent.
- **Fostering strategic alliances**, such as with the Spanish Diversity Charter, have aided Correos' high-level commitments.

Communication and awareness raising

Within the communication and awareness-raising, Correos:

- **Internally** involve their employees in the actions and projects underway in the area of D&I through their **diversity calendar**. Actions based on this calendar include talks, conferences, Correos' own content (newsletters, infographics, videos, communications, podcasts), training, welcome programmes with diversity content, development programmes such as '*Correos en Femenino*', awards for initiatives related to D&I, raising awareness of inclusive language, access to content through their intranet ('*Conecta*') and the Talent community; and
- **Externally** encourage D&I through talks, forums, debates, round tables, articles, presentations, specialised working groups and by joining institutions that promote and encourage the commitment to diversity through dissemination and research work.

Social responsibility

With regards to social responsibility, Correos are signatories to the Social Development Goals (SDGs) and promote SDG 5 through actions such as their collection of 8M stamps^{420, 421} or support for women entrepreneurs in rural areas.

'Healthy company'

In terms of being a 'healthy company', Correos carry out specific campaigns for women, such as those to prevent osteoporosis, breast cancer or to improve the pelvic floor, and are incorporating gender mainstreaming into numerous initiatives. Correos also carry out programmes from a generational perspective, such as early detection of prostate cancer with specific tests from a certain age.

8.14.3. Good practice achievements and impact

Key success factors include **managements' and staff commitment and buy-in**, in working towards an inclusive culture. Correos have both top-down and bottom-up initiatives and strategies to respond to the needs, demands and concerns of the people who make up the organisation. **Having a dedicated D&I budget** is also recognised as important to deploy the necessary initiatives.

Challenges include information gathering and ensuring that D&I work (such as training, awareness raising etc) is ongoing (i.e. not a one-off commitment). However, first and foremost, it is necessary to understand that it **is change management**⁴²², and requires the

⁴²⁰ See: Correos Accessed 2024a.

⁴²¹ The '*Campaña #8M Todo El Año*' is a stamp collection dedicated to women who fought for gender equality and aims to show Correos continued commitment to full equality. The '*Campaña #8M Todo El Año*' and other Good practices features on a site with shared good practices according to the UN Sustainable Development Goals (SDGs) and the 10 principles. See: Plataforma COMparte, Accessed 2024.

⁴²² Change management 'is the process of guiding organizational change to fruition, from the earliest stages of conception and preparation, through implementation and, finally, to resolution.' See: Harvard Business School, Online, 2020.

involvement of management and making models visible. These challenges can become opportunities if they are properly managed.

Correos measure the results after the implementation of specific actions in the strategy through three levels of **indicators**. The KPI's are continuously reviewed and improved. Depending on the bodies to which these data are presented, they are reported at different intervals. Correos have several tools (committees, project and status reports). Depending on the context, these tools may be employed on a monthly, quarterly, semi-annual or annual basis. Some of the key metrics include the representation percentages of different diversities (with cross-tabulation e.g. gender and age), training hours, percentage of project execution, etc.

Wider indicators are reported in Correos' Annual Reports. Correos' Statement of Non-Financial Information is published in accordance with the requirements set out in Law 11/201865, using as a reference the GRI Sustainability Reporting Standards of the Global Reporting Initiative (GRI). Further, since 2022 Correos are signatories to the United Nations Global Compact, with the commitment to respect and promote ten principles relating to human and labour rights, the environment and anti-corruption, Correos is also aligned with the United Nations Sustainable Development Goals and reports its commitments and contributions to achieving the 2030 Agenda. For example, '*46. Política contra todo tipo de discriminación y, en su caso, de gestión de la diversidad*' (*46. Policy against all forms of discrimination and, where appropriate, diversity management*) indicators are GRI 3-3, GRI 405-1, Principle 6 Global Pact and SDG 5, 8 and 10. See Correos Annual report for further details⁴²³.

Over 2023, Correos carried out more than 130 D&I actions. 56% of the actions have been internal while 44% have been external, showcasing Correos' commitment to both internal D&I and to societal change.

The benefits derived from managing diversity include an improved working environment, more creativity and innovation, a greater sense of belonging, a better corporate reputation, attracting diverse talent.

8.14.4. Transferability and Lessons Learnt

Developing D&I can bring about benefits to individuals, the organisation and wider society.

Correos has learnt how to make their D&I actions effective and impactful; they recognise the value of and effectively deploy their D&I Plan and continually strive for improvement. Correos has had an equality plan in place since 2011. While they consider that their percentage of women is adequate, they continue to strive to improve it. Correos D&I actions have helped to achieve a representation of women in all professional groups of above 30%. The D&I initiatives allow Correos to establish an inclusive culture, and to comprehensively approach D&I across the business, from both the needs of individuals, the business, and wider society.

An **effective D&I Plan** ensures that all of the dimensions of diversity set out in the Plan receive appropriate attention and are sufficiently addressed. Such a Plan can be developed around the different company processes (such as promotion and recruitment, training, culture etc), under each of which, are the dimensions of diversity (such as gender, age, disability etc). Each company process then has a general work objective and sub-objectives related to each dimension of diversity. Further, an effective D&I Plan can, for example:

⁴²³ Reporting on non-financial indicators begins on page 177. See: Correos, 2024.

- Ensure that the planned D&I actions are tailored and consider the needs of the company and staff;
- Facilitate monitoring and reporting; and
- That D&I is integrated into the whole organisation.

Developing a D&I Plan is a highly transferable action that could be undertaken by other organisations aiming to improve D&I across their business processes.

8.15. The sponsorship programme – Toyota Motor Europe

8.15.1. Introduction

The sponsorship programme, implemented by **Toyota Motor Europe (TME)**, aims to support key female talent to unleash their full career potential and simultaneously develop executive leaders to become more inclusive leaders and better allies. The selected women, 'sponsees' are partnered with an executive 'sponsor' from a different business area for the duration of the one year⁴²⁴ programme. Training is given to both the sponsee and sponsor in the form of assessments, skill building sessions and coaching. The content is designed to support the women to overcome the common barriers that they can face when seeking career advancement. The sponsors key purpose is to champion the women by connecting them to their networks, supporting their visibility across the business and advocating for them especially when they are not in the room. The programme is delivered with the support of an external organisation. From the first three cohorts, 100% of women who participated either advanced laterally by rotating to another area of the business or vertically through promotion. –In addition, through the participation of and investment in the sponsors, the programme has also fostered inclusive leadership across TME.

8.15.2. Practice Overview

TME is a subsidiary of Toyota Motor Corporation. TME's European headquarters and research and development (R&D) centre is based in Brussels, Belgium and they oversee operations across Europe and Western Asia, including Turkey, Russia, Israel, Kazakhstan and the Caucasus. TME's activities include R&D, manufacturing, sales, marketing, and after-sales⁴²⁵. In 2024, TME employed approximately 24,000 workers directly.

TME have developed a multi-year DE&I strategy that encompasses several dimensions of DE&I and integrates and drives inclusion across the organisation. These include, establishing a Diversity Advisory Board and the role of Chief Diversity Officer; working towards making their facilities more inclusive and accessible by providing inclusion training and developing more inclusive policies; the annual European Diversity Conference⁴²⁶; annual celebrations of International Women's Day with a week of activities, along with

⁴²⁴ Note that sponsorship differs from mentorship. Generally, a mentor offers guidance and advice, while a sponsor may take an active role in the sponsored parties' career advancement (such as providing high-visibility projects). (See: *Harvard Business Review (2021) What's the difference between a Mentor and a Sponsor*. Available at: <https://hbr.org/2021/10/whats-the-difference-between-a-mentor-and-a-sponsor>)

⁴²⁵ See: *Toyota (Accessed 2024) Toyota Motor Europe*. Available at: <https://www.toyota-europe.com/about-us/toyota-in-europe/toyota-motor-europe>

⁴²⁶ In 2021, TME held their first annual European Diversity Conference. The Conferences involve presentations from executives, group discussions and employee sessions, serving to aid accountability and inform attendees on developments in the different business areas.

International Day Against Homophobia, Transphobia and Biphobia (IDAHOT), Pride month and various other events⁴²⁷; and employee networks^{428, 429}.

The TME sponsorship programme supports key female talent to unleash their full career potential, by increasing their visibility, broadening their networks and through targeted training. This helps them to gain clarity of their career goals and overcome the barriers that they may face when considering career advancement. While not the objective of the programme, it generates the conditions for career progression in the form of a promotion or lateral movement. TME identified the activity from benchmarking North America⁴³⁰, as a practice that Toyota Motor North America (TMNA) had implemented.

The programme run by TME has had four cohorts who have graduated and recently launched cohort five. The first three cohorts had an average of ten sponsored participants. Due to the success of the programme, since cohort four, TME have increased the cohort size to an average of 30 participants per year. Additionally, the programme initially ran for 18 months. However, the programme has been refined and now runs for 12 months, with a kick off in the autumn of each year.

The target population are key female talent from across the business areas (e.g. corporate, manufacturing, sales, and R&D) and based in Europe. TME ensure that at least one third of the participants are STEM (Science, Technology, Engineering, and Mathematics).

The implementation process begins with the matching process. In this step, the selected female talent are partnered with an appropriate executive leader outside of their business area. The programme is formally launched through a kick-off event where all participants meet in person, creating a sponsorship community from the outset. Over the course of the year long programme, the sponsees and sponsors both receive training in parallel. This is in the form of skill building sessions and coaching. Sponsees are also required to take assessments. The training is delivered by an external company. The matched sponsees and sponsors also meet independently (guideline of once per month). This is integral to the success of the programme. At the end of the one year, the matched pairs of sponsees and sponsors participate in a closing event and are required to prepare and deliver a short presentation to the sponsorship community reflecting on their learning journey, development outcomes and next actions.

8.15.3. Good practice achievements and impact

To date across five cohorts, a total of 89 women have participated in the sponsorship programme. Due to the success of the programme and with the aim of multiplying the impact, the number of participants was increased in cohort 4 and extended to the lower tier of management. Across cohorts 1, 2 & 3, 100% of sponsored women have had a change in position after the programme, either vertically, indicating a promotion or horizontally, indicating a lateral move to another area of the business. As such, the programme has

⁴²⁷ Toyota (Accessed 2025) Diversity, Equity & Inclusion. Available at: <https://www.toyota-europe.com/about-us/diversity-equity-and-inclusion>

⁴²⁸ The employee networks (also known as Employee Resource Groups (ERGs)) provide a space for under-privileged groups and allies, raise awareness by organising events and activities and advise on DE&I policies. Each group has an executive sponsor that provides guidance and direction if required. There are five ERGs, these are the Women's network, the LGBTIQ+ network, the Diverse abilities network, the Cultural diversity network and the Multi-generations network.

⁴²⁹ Toyota (Accessed 2025) Diversity, Equity & Inclusion. Available at: <https://www.toyota-europe.com/about-us/diversity-equity-and-inclusion>

⁴³⁰ Benchmarking refers to the practice of comparing business processes and performance metrics to industry bests and best practices from other companies.

contributed to an increase in the number of women in leadership positions, which is a key business goal for TME.

In addition to monitoring any changes in position after the programme, TME monitor the results of the sponsorship programme through survey feedback and encourages sponsors to continue to champion and support the sponsees beyond the one year partnership.

As the programme has been running for a number of years, in partnership with the external company, TME have conducted regular reviews and fine-tuned their content so that it complements TME's culture and reflects the current needs of the business. By providing training suited to TME's needs and preferences⁴³¹, their content has contributed to achieving positive outcomes. The programme length (previously 18 months, now 12 months) was also found to be effective and appropriate.

A success factor of the programme lies in the fact that there is **strong leadership support**. DEI is recognised as a top business priority and integral to the company strategy.

Further, the effective selection and onboarding of the executive sponsors have been a success factor of the programme. In terms of **selection**, TME's experience and lessons learnt have allowed them to identify what type of sponsor will be effective (and what type of person will complement them). Executive sponsors' have contributed to an effective sponsorship programme (as noted, 100% of all sponsored women from cohorts 1, 2 & 3 had a change in position). The dedicated onboarding process for each cohort of sponsors is regarded by TME as an opportunity for the sponsors to learn first-hand about the journey and lived experience of women in the workplace and the barriers that they can face when considering career advancement. Through this investment in the sponsors, **TME are driving inclusive leadership across the organisation – this is seen as a key success of the programme**.

8.15.4. Transferability and Lessons Learnt

The programme is considered to be successful at aiding the development and progression of female talent and thereby benefiting the organisation. TME therefore plan to continue to invest in the sponsorship programme.

Additionally, TME have noted that over time, the cohorts have gradually been 'working their way down the organisation' (i.e. the programme is benefiting women across varying levels of seniority). TME ensure the right individuals are selected by working together with line management. TME are also looking at how the alumni network of sponsees can be leveraged to support the development and growth of other women across the business. As they have had the benefit of the training, they are equipped with the skills needed to mentor and sponsor other women. In this way TME can maximise the benefit and reach of the programme.

TME have considered the transferability of the practice to other demographic groups. However, while TME are looking to develop other areas of diversity (such as ethno-culture) and build a more diverse leadership team, they are faced with the challenge of collecting data. While gender data can be collected in Europe, systematically collecting data for other demographic groups is challenging. For now, TME are promoting the use of classic and reverse mentoring⁴³² for other demographic groups.

⁴³¹ For example, external companies may change their presentation style, etc.

⁴³² While classic mentoring is centred on the development on junior mentees (with guidance and advice), reverse mentoring generally refers to senior leadership being mentored by a more junior colleague. Often the more junior colleague is different to them in some way from a D&I perspective. Reverse mentoring can increase the mentee's inclusion

For DEI initiatives to be successful, an engaged and invested senior leadership is critical. To this end, as part of their DE&I plan, TME have a Diversity Advisory Board and Chief Diversity Officer. Further, the DE&I strategy is embedded and reflected in the annual planning of the company executives. All management staff are required to have an objective around DE&I, objectives are linked to performance and performance is linked to the bonus. The employee voice is also important to successful implementation of DEI initiatives. TME leverage the employee voice and have established practices such as Employee Resource Groups and Diversity Champions that are embedded in the business. As such, all staff, including senior staff connect with the topic of DE&I and integrate it into their daily working practices.

8.16. Employee Resource Groups (ERGs)

8.16.1. Introduction

Employee Resource Groups (ERGs), or ‘Worker Networking Groups’, are voluntary initiatives that **bring together employees sharing common characteristics** such as gender, ethnic or racial origin, sexual orientation, disability or other shared experiences⁴³³. These groups have been assisting in the ongoing development of D&I policies within organisations across Europe. ERGs **strengthen diverse perspectives, provide mentorship opportunities, and promote cultural change by challenging internal biases**⁴³⁴. This good practice demonstrates how ERGs can positively impact career progression, leadership diversity, and workplace culture. Their successes have been driven by the presence of executive support and data-driven evaluations.

8.16.2. Practice Overview

By leveraging the unique perspectives and experiences of their members, ERGs aim to **encourage collaboration, innovation, and a more inclusive workplace culture**. At the same time, they **align with organisational objectives**, ensuring that D&I become **integral components of corporate strategies**.

ERGs serve as **a mechanism for reconciling representation gaps, promoting inclusive practices, and advocating for broader policy changes** that benefit employees and organisational growth. These groups aim to create environments **where underrepresented employees feel valued, supported, and empowered** to contribute and advance within the organisation

In the analysed organisations, the ERGs began as **grassroots efforts**, with employees **identifying challenges and proposing solutions** before the initiatives gained formal support from HR and leadership teams.

Each analysed organisation⁴³⁵ adopted **unique approaches to implementing ERGs**, while sharing common elements of grassroots engagement and executive backing. At a large communications organisation in Poland⁴³⁶, efforts to implement and embed D&I policies and practices began with “*internal dialogue*” sessions⁴³⁷, which allowed employees to share their priorities and concerns. This inclusive process catalysed grassroots initiatives, including networks supporting women, LGBTIQ employees, and neurodiverse individuals. Similarly, a multinational bank in Poland embraced a bottom-up approach, with six worker networks focusing on women, persons with disabilities, neurodiversity, LGBTIQ, age diversity, and a partnership family model⁴³⁸. Initially, there was only one initiative focused on women, but through ERGs, the organisation was able to develop additional support based on the specific needs shared by the workers⁴³⁹. The organisation also held annual competitions to develop new D&I focused projects, an approach that has also resulted in the creation of

⁴³³ ManageHR, 2024.

⁴³⁴ Ibid.

⁴³⁵ GP_6b, SIG_PL_1, GP_13.

⁴³⁶ SIG_PL_1

⁴³⁷ SIG_1_PL INT.

⁴³⁸ GP_6b INT.

⁴³⁹ Ibid.

additional ERGs⁴⁴⁰. These networks emerged organically from employee-driven efforts before being formalised with HR and leadership support.

At a Greek branch of a multinational technology company, ERGs were established with a focus on enhancing collaboration across groups of workers, using an intersectional approach to connect disability, LGBTIQ, and ethnic minority networks⁴⁴¹. This strategy ensured the development of cohesive and collaborative projects were tailored to address the specific needs of employee and clients.

8.16.3. Good practice achievements and impact

Collectively, ERGs have resulted in **significant improvements and changes** within their respective organisations. ERGs have driven D&I initiatives through **grassroots efforts**, encouraged **equitable leadership development**, inspired **inclusive networks** within and between organisations, and encouraged **greater innovation**, creating **observable cultural change and measurable benefits** for both employees and organisations.

Within a Polish bank, the "Women Up" programme addressed **gender disparities** by funding 10 projects annually since 2020 to enhance women's leadership capacities⁴⁴². This initiative not only supported women but later **helped to inspired related networks**, such as those for LGBTIQ rights, neurodiversity, and diverse family models. These networks fostered synergies and had spin-off effects. For instance, the partnership family model network initially focused on supporting mothers, and it later expanded to include fathers, non-biological parents, and neurodiverse children of employees. An interviewee at a Polish bank noted that their LGBTIQ advocacy network, which was implemented despite societal resistance, became **a model for inclusive policies**, inspiring similar initiatives to be developed internationally **across the organisation's broader international network**. The establishment of neurodiversity networks further contributed to the organisation's ongoing innovation in consumer services as a result of their ERGs, producing a "*user manual*" for managers and developing guidance to support neurodiverse clients⁴⁴³.

A Polish communications organisation also utilised the power of grassroots, employee-driven ERGs to drive equality and inclusion. Its women's network evolved from an informal initiative to a formalised pillar of the company's D&I strategy, benefiting from financial and executive support⁴⁴⁴. The organisation's efforts to support LGBTIQ employees demonstrated **a commitment to treating D&I as a core value**, even in the face of societal resistance. Recent neurodiversity initiatives reflected the communications organisation's growing emphasis on developing an open and inclusive organisational culture⁴⁴⁵. Critical to these successes was **the involvement of employees at all levels**, facilitated by **transparent communication channels** and strong **top-management endorsement**.

For the Greek branch of an international technology organisation, ERGs achieved **external impact** by making a positive contribution to the local community. By encouraging collaborations between disability, LGBTIQ, and ethnic minority groups, the organisation created initiatives that addressed "*real community needs*"⁴⁴⁶. The organisation **built**

⁴⁴⁰ Ibid.

⁴⁴¹ GP_13 INT.

⁴⁴² GP_6b INT.

⁴⁴³ Ibid.

⁴⁴⁴ SIG_PL_1 INT.

⁴⁴⁵ Ibid.

⁴⁴⁶ GP_13 INT.

external partnerships with local organisations and universities, reinforcing its **reputation as a socially responsible employer**. **Internal feedback mechanisms**, such as surveys and data tracking, **provided actionable insights** that strengthened ERG programmes. Metrics, including employee retention and progression, demonstrated the tangible benefits of these initiatives for both employees and the organisation⁴⁴⁷.

8.16.4. Transferability and Lessons Learnt

The successes of ERGs highlight several key principles that may prove useful in guiding similar initiatives elsewhere. These included:

- Grassroots initiatives,
- Executive support,
- Synergistic approach,
- Continuous evaluation.

For instance, **grassroots involvement** was regarded as pivotal. **The use of bottom-up** (rather than top-down) **initiatives**, as seen from the interviews with the Greek branch of an international technology company and Polish communications organisation, demonstrate how empowering employees to lead and shape ERGs ensures that the initiatives are relevant, innovative, and tailored to real needs⁴⁴⁸. As demonstrated by these two organisations, worker-led efforts encourage greater engagement and promote D&I principles authentically⁴⁴⁹.

Equally important is **the presence of executive support** and **the provision of adequate resources**. By embedding ERG activities within operational strategies and securing financial and managerial backing, organisations like the Greek technology and Polish communications bodies were able to ensure the longevity and sustainability of their D&I initiatives. This support also signals a commitment to addressing employees' needs, strengthening trust and solidarity between leadership and staff⁴⁵⁰.

Adapting **an intersectional approach and promoting synergy and strengthening links and collaboration between networks** further increased the effectiveness of ERGs. The Greek technology company's emphasis on partnerships between diverse employee groups demonstrated how such collaborations can address a broader range of aspects while building stronger ties and enhancing cooperation between networks⁴⁵¹. Similarly, initiatives such as confidence-building workshops within both the Polish communications organisation⁴⁵² or the Polish banking organisation's neurodiversity networks⁴⁵³ evolved to encompass a wider demographic, ensuring inclusivity and adaptability. **Adapting to socio-cultural contexts** is another key lesson learnt. Both the Polish bank and Polish communications organisation's faced resistance to initiatives like LGBTIQ advocacy but overcame these challenges by framing D&I as a core organisational value rather than a

⁴⁴⁷ Ibid.

⁴⁴⁸ GP_13 INT; SIG_1_PL INT.

⁴⁴⁹ SIG_PL_1 INT; GP_6b INT

⁴⁵⁰ GP_6b INT; SIG_PL_1 INT.

⁴⁵¹ GP_13 INT.

⁴⁵² SIG_PL_1 INT.

⁴⁵³ GP_6b INT.

compliance requirement⁴⁵⁴. This approach helped to build resilience and long-term support for ERGs in environments where such efforts might face opposition.

Finally, **continuous evaluation** is linked to the success of ERGs. The exemplary organisations exploited a variety of metrics - employee retention, feedback surveys, and productivity measures - to track progress and ensure alignment with broader organisational goals and adapted a learning and adaptable mindset to accommodate lessons learnt.

⁴⁵⁴ GP_6b INT; SIG_PL_1 INT.

8.17. Elevate Pledge – Business in the Community Ireland

8.17.1. Introduction

The Elevate Pledge committed 60 companies representing over 150.000 employees across 18 different industry sectors, to build more inclusive workplaces reflective of Irish society. Signatories were asked to record the diversity profile of their workforce and develop tangible actions ensuring the recruitment, retention and progression of diverse talent. These efforts, based on data-driven interventions and mutual learning, increased diversity insights, reduced representation gaps, and improved social inclusion within the working environment.

8.17.2. Practice Overview

The Elevate Pledge aims to bridge inclusion gaps within the workforce through data-driven actions based on voluntary disclosure of signatory companies' diversity profiles. Large employers serve as microcosms of wider society. The rationale behind this initiative lies in the understanding that overcoming workforce disparities not only enhance business outcomes but also generates ripple effects fostering greater social cohesion in the broader community. The Elevate Pledge, therefore, represents a public commitment from employers to actively strive for positive social impact.

It was introduced in Ireland in 2021 by Business in the Community Ireland (BITCI) -, a non-profit company for economic, environmental and social good delivering programmes to tackle inequality and disadvantage in communities right at national level. Unemployment rates remain disproportionately high among certain groups in Ireland, including people with disabilities, migrants, and members of the Traveller community. In an economy facing significant skill shortages, it is essential to enhance employment opportunities for these underrepresented groups. This challenge was the driving force behind BITCI's decision to launch the Elevate Pledge. The initiative spans across 18 sectors (e.g., financial and professional services, pharmaceuticals, retail, and construction) with participation from 60 companies (mainly BITCI members) representing over 150.000 employees. Signatories are at varying stages in their journey toward creating diverse, equitable, and inclusive workplaces. Despite this, the Pledge supports them in translating ambitions into accountability, ultimately shaping a community of practitioners dedicated to advance inclusion. Through data collection, organisations can track outcomes, adjust strategies and learn best practices from peers to overcome challenges, and set next steps. Moreover, BITCI hosts ad-hoc webinars to facilitate this exchange, helping companies identify opportunities for further improvement. Finally, the voluntary nature of the initiative encourages broad participation.

The Elevate Pledge focuses on ensuring equal access for underrepresented groups, specifically:

- Women
- Individuals with disabilities
- Ethnic minorities
- Socio-economically disadvantaged workers
- LGBTIQ individuals
- Traveller community

To this end, signatory companies adopted inclusive hiring practices, setting representation targets, employee resource groups, zero tolerance campaigns, and launched tailored employment support programs, also in partnerships with DEIS schools, to widen participation and eliminate barriers.

As regards implementation, signatories were asked to submit a dataset with their organisation's diversity profile against six indicators (i.e., gender, disability, racial or ethnic origin, Traveller community, socio economic status and sexual orientation) and where possible against seven descriptors (i.e., jurisdictions, terms of employment, working hours, organisational level, salary band, length of service, pay period). BITCI provided them a detailed guidance document to help prepare the requisite dataset and ensure complete anonymity of individual employees. Each dataset received by BITCI was further anonymised to remove any company identifier and was then aggregated into one collective dataset. Participants also pledged to share information on the activities developed to enhance inclusion (e.g., training, inclusive recruitment and progression practices, D&I-related KPIs and targets, employee resource groups, partnerships etc). Progress was monitored both internally and externally. Internally, progress is tracked by monitoring key metrics such as the number of signatories improving year-on-year, disclosure rates, and the completeness of the data set. These indicators help determine if companies are actively improving their D&I efforts, implementing meaningful actions. Externally, the initiative evaluates its effectiveness by comparing the collected diversity data against census data and labour force participation rates. This allows the program to determine how well signatories are performing in relation to national benchmarks. Companies committed to report annually on their progress, showing how their workforce is mirroring the Irish society in terms of diversity. By identifying gaps between the current workforce demographics and the societal features, the Elevate Pledge works to narrow disparities. Additionally, clear evidence of progress, such as data on diversity representation and career development outcomes, is essential for businesses to advance their D&I strategies, see a tangible return on investment, and back their claims with data, avoiding the risk of social washing while enhancing their reputation. These compelling benefits are key drivers for companies to join the Pledge.

8.17.3. Good practice achievements and impact

To measure impact of implemented actions, signatory organisations are required to regularly collect and report to BITCI a variety of data points. These data are subsequently analysed by BITCI to measure achievements. The following metrics are collected:

- **Diversity profiles**, including metrics on gender, nationality, racial or ethnic origin, disability, socio-economic status, and sexual orientation.
- **Voluntary disclosure rates**
- **Progress on tangible actions** (e.g. the implementation of inclusive hiring practices and representation goals is tracked and reviewed through achievement of goals set out in the company action plans)

Based on data collected between 2023 and 2024 from all the Elevate Pledge signatories, the following key impacts were identified:

Female Representation

- **2023:** Women made up **41%** of the overall workforce across signatories, which was 6% below the Irish labour force average of 47%. This lower percentage was attributed to the inclusion of new signatories from traditionally male-dominated industries.

- **2024:** Female representation increased to **43%**, closing the gap and indicating progress in addressing gender imbalance across the workforce.

Racial or ethnic origin

- **2023:** Racial or ethnic origin data was disclosed for **10%** of the workforce, involving 15,444 employees.
- Only 1.7% of employees disclosed a racial or ethnic origin other than white.
- **2024:** Racial and ethnic origin data disclosure improved to 20%.
- Non-white employees comprised 4.8% of the workforce.

Sexual Orientation

- **2023:** Data on sexual orientation was disclosed for 6% of employees.
- LGBTQIA+ employees represented 5% of those who disclosed their sexual orientation.
- **2024:** Disclosure rates improved to 16%.
- LGBTIQ employees represented 6% of those who disclosed their orientation.

The number of signatories providing information on their employee's sexual orientation also increased significantly from 9 to 15 companies.

Disabilities

- **2023:** Disability data was disclosed for **11%** of the workforce.
- **2024:** Disability data disclosure increased to **14%**.

Socio Economic Status

- **2023:** 7 out of 60 signatories have started to capture socioeconomic demographics.
- **2024:** 10 out of 60 signatories have started to track data on socioeconomic status.

Key Success Factors

The Elevate workforce data enables companies to review their diversity profiles effectively and take informed decisions to improve workplaces inclusivity. Along with benchmarking, this framework is critical, as companies can assess their performance against peers and identify areas for improvement. Additionally, peer learning and support enable the sharing of best practices on how to better address disparities and strengthen a culture of equity and inclusion within the company, amplifying the impact of the initiative.

Major Challenges/Obstacles

A significant realisation has been overcoming misconceptions about legal barriers to data collection. For instance, while companies initially thought they could not ask employees to reveal disabilities, they learned that it is legal (under GDPR) if the purpose is clearly

communicated, and employees understand how their data will be used. GDPR Article 9(2)(a) allows for the processing of special categories of personal data with explicit consent, as long as the purpose is transparent. Additionally, Article 5 outlines essential principles like data minimisation (Art. 5(1)(c)), ensuring only necessary data is collected. While these principles are crucial for compliance, some organisations find it increasingly challenging to navigate them as data processing and regulatory expectations evolve. However, a significant barrier remains voluntary disclosure and the challenge of collecting accurate data. Organisations need to dedicate time and resources to make employees feel comfortable disclosing personal information. Moreover, once the data is collected, companies must have the capacity to analyse it, understand the insights, and implement actions that drive meaningful change. Despite this, BITCI noticed that signatory companies are recognizing the benefits of having a baseline and using it to guide improvements. One such strategy for overcoming potential challenges of data collection and disclosure is the community of practitioners. By showcasing that other companies are successfully gathering diversity data, the initiative helps to dispel fears and misconceptions about the process. This peer influence has been powerful, as companies often return to their own organizations with the confidence that others are doing the same, making it easier for them to commit to the process themselves. This shared experience and support network significantly mitigates the initial reluctance linked to data protection restrictions, strengthening the collective commitment to D&I.

8.17.4. Transferability and Lessons Learnt

The Elevate Pledge offers significant lessons learnt for organisations globally aiming to enhance D&I within workplaces. One of its major strengths lies in its data-driven approach: the practice of collecting and analysing voluntary diversity data enables signatories to identify gaps, make informed decisions on where to focus their efforts and back their claims with solid evidence. This model can be adapted to various contexts by customizing the data points collected to reflect the specificities of the demographic and socio-economic landscapes, while improving accountability. Furthermore, a key lesson is the value of collaborative networks. The collective approach of the Elevate Pledge, where signatory companies share actionable insights on their respective D&I strategies (e.g. diversity measurement), fosters a community of mutual learning. BITCI's efforts in aggregating data, facilitating signatories' interactions through ad-hoc activities, and compiling results in an annual report play a crucial role, guiding participants to overcome challenges and drive positive change. By sharing their experiences, the BITCI initiative can inspire similar efforts in different environments, even in areas where misconceptions regarding the feasibility to collect data, such as in Ireland. In closing, the Elevate Pledge demonstrates the rise of dedicated D&I Manager roles reflecting the increasing recognition of D&I as a distinct function within organisations. Companies are asked to clarify who is responsible for diversity within their structure, identifying the head of diversity and where they report. Data on how many diversity leaders report directly to the CEO or C-Suite further highlights the emergence of D&I as a strategic priority within multiple businesses.

8.18. Exchange and transfer of practices within a large transnational financial corporation (Diversity & Inclusion Corporate Group Framework)

8.18.1. Introduction

The coordinated Diversity and Inclusion (D&I) corporate group framework between the French headquarters and the Polish subsidiary of a large transnational financial corporation has achieved measurable improvements in workplace inclusivity and employee engagement. **By aligning global standards with local needs**, the corporation has implemented initiatives such as **neurodiversity programmes, gender diversity in leadership, and psychological safety measures for LGBTIQ employees**. These outcomes were driven by strong leadership commitment, diagnostic tools like the Diversity IN Check initiative (see Section 8.6)⁴⁵⁵, and employee-driven resource groups, creating a scalable model for sustainable and impactful D&I practices.

8.18.2. Practice Overview

The coordination and interoperability of a D&I framework between the French headquarters and the Polish subsidiary of a large financial corporation reflects a commitment to fostering equitable and inclusive work environments tailored to diverse cultural and regulatory contexts. Rooted in global standards such as the Sustainable Development Goals (SDGs)⁴⁵⁶, supported by internal agreements and a **pioneering Global Social Agreement**⁴⁵⁷, the institution's D&I approach is integral to its corporate social responsibility (CSR) and **environmental, social, and governance (ESG) strategies**. Introduced progressively over two decades, the French framework influenced the Polish subsidiary, which adapted these principles to address local challenges, such as a relatively homogenous demographic and differing socio-political dynamics.

In Poland, the Diversity Charter was established in 2012, and the Polish branch of the corporation signed it in 2016, which helped align local policies with the well-established D&I framework in France⁴⁵⁸. This process included the creation of roles dedicated to D&I, transitioning from initiatives driven by human resources and business operations to a structured and measurable approach. Notable **practices include initiatives supporting underrepresented groups such as women, neurodivergent individuals, and the LGBTIQ community, despite socio-political resistance**.

The implementation of these practices aims to address systemic barriers, foster inclusivity, and enhance organisational performance. Initiatives such as the **Diversity IN Check**

⁴⁵⁵ See case study 8.6. The Diversity IN Check (DINC) initiative was launched in Poland in 2020 by the Forum Odpowiedzialnego Biznesu – Responsible Business Forum (FOB), the longest-running and largest governmental organisation in the country, responsible for the coordination of the Polish Diversity Charter (Karta Różnorodności). See FOB, no date a.

⁴⁵⁶ United Nations, no date b.

⁴⁵⁷ This agreement, signed in collaboration with the UNI Global Union, a federation recognised by the International Labour Organisation. UNI Global union represents more than 20 million workers in the services sectors in 150 countries See: UNI, no date.

⁴⁵⁸ GP_6b_WRK INT.

(DINC)⁴⁵⁹ survey in Poland (see Section 8.6) have provided diagnostic tools to assess and refine strategies, encouraging the corporation to integrate D&I considerations comprehensively across its operations. This includes ensuring accessibility in physical spaces, digital platforms, and products, and addressing psychological safety and inclusivity for employees and clients.

Through its focus on global alignment and local adaptation, the corporation's D&I framework aspires to create workplaces that not only reflect its values but also adapt to evolving societal expectations and legal frameworks, thereby achieving long-term sustainability and positive social impact.

8.18.3. Good practice achievements and impact

The coordination of D&I practices between the French headquarters and the Polish subsidiary of the financial corporation has resulted in significant impacts: enhancing inclusivity, equity, and cultural adaptation across the organisation. By aligning global standards with local needs, the framework has driven improvements in workplace diversity, employee engagement, and overall organisational performance.

One notable achievement is the **improved representation of underrepresented groups, particularly women in leadership and neurodivergent employees**. This led to almost equal gender representation within the whole organisation (51% men and 49% women). Initiatives such as the Women Up programme and neurodiversity-focused measures have created opportunities for career advancement and inclusivity with recruitment measures ensuring a 50/50 gender balance. These impacts are tracked through metrics like **recruitment diversity statistics, employee perception surveys, and accessibility audits**. The corporation's participation in the **Diversity IN Check (DINC) survey** provides additional diagnostic tools to monitor progress, identify gaps, and refine strategies⁴⁶⁰.

The adoption of **accessibility and psychological safety measures for LGBTIQ employees in Poland**, despite socio-political resistance, demonstrates the corporate commitment to inclusivity. These initiatives have led to increased employee retention and satisfaction, with progress assessed through localised indicators, such as the inclusion of specific demographic data where legally permissible⁴⁶¹.

The success of the coordinated framework is rooted in strong leadership commitment, which anchors D&I as a strategic priority across both the headquarters and subsidiary. Dedicated roles, such as D&I managers, and employee-driven initiatives, such as resource groups for women, LGBTIQ individuals, and neurodivergent employees, have been pivotal in driving progress. Structured knowledge-sharing tools, such as the Diversity Book, have facilitated the replication of effective practices across locations.

More specifically the **Diversity Book** is biannually updated resource serving corporation's diversity officers. It contains detailed records of local actions, links to videos, articles, and other materials. Diversity officers worldwide can access the book to see initiatives implemented by other countries. For example, a team in Poland can search for disability programmes, review actions in other countries, and reach out for collaboration or duplication.

The **hybrid approach of top-down governance paired with bottom-up implementation** has ensured that global principles align with local adaptations. This dual model has enabled

⁴⁵⁹ FOB, no date; GP_6_ORG INT.

⁴⁶⁰ GP_6b_WRK INT.

⁴⁶¹ Ibid.

the subsidiary to build upon French best practices while tailoring them to Poland's unique socio-economic and cultural context⁴⁶².

Challenges included socio-political resistance in Poland, particularly around LGBTIQ inclusion, and the lack of formal D&I training. These were mitigated through sustained advocacy, awareness campaigns, and participation in workshops provided by the Diversity IN Check platform⁴⁶³. Collaboration between the headquarters and subsidiary fostered mutual understanding, with the Polish subsidiary becoming a source of inspiration for innovative initiatives, such as neurodiversity programmes.

By addressing these challenges proactively, the coordinated D&I framework has established a robust model for advancing diversity, ensuring measurable progress, and fostering sustainable inclusivity across its operations.

8.18.4. Transferability and Lessons Learnt

The **coordinated D&I framework** implemented by the financial corporation offers significant transferability across organisations and sectors⁴⁶⁴. Its **hybrid approach, combining top-down global governance with bottom-up local adaptation**, ensures consistency in principles while allowing flexibility to meet country-specific cultural and regulatory needs. For instance, the French headquarters provided a mature framework that was adapted by the Polish subsidiary to address local challenges, such as a less diverse workforce and socio-political resistance. This model highlights the value of balancing global standards with local relevance to drive effective and scalable D&I initiatives.

Key lessons include the **importance of leadership commitment and accountability in embedding D&I as a strategic priority**. Dedicated roles and robust metrics, such as those provided by the Diversity IN Check (DINC) survey, have enabled the corporation to monitor progress and identify areas for improvement which constitutes a practice with high transferability potential. The use of employee-driven resource groups and knowledge-sharing tools, such as the Diversity Book, fosters collaboration and ensures initiatives are responsive to workforce needs. Additionally, the Polish subsidiary's innovative practices, such as neurodiversity-focused programmes, demonstrate how locally adapted initiatives can influence and inspire global practices.

The experience also highlights the need to address socio-political challenges through sustained advocacy and awareness campaigns. The corporation's success in overcoming resistance to LGBTIQ inclusion in Poland highlights the critical role of perseverance and transparent communication. By creating an adaptable and inclusive framework, the corporation has established a model that can be replicated across sectors, enabling businesses to achieve sustainable and impactful D&I outcomes.

⁴⁶² GP_10_ORG INT.

⁴⁶³ GP_6b_WRK INT.

⁴⁶⁴ GP_6b_WKR INT; GP_10_ORG INT.

8.19. Interregionaler Gewerkschaftsrat Bodensee (Interregional Trade Union Council Lake Constance)

8.19.1. Introduction

Since 2016, the *Interregionale Gewerkschaftsrat Bodensee* (IGR Bodensee), an interregional council of local trade union representatives in Germany, Switzerland, Austria, and Liechtenstein, has implemented a **joint annual press tour across the four member countries in the region of Lake Constance**. The press tour highlights challenges affecting workers in the cross-border labour market and potential solutions shared by its member organisations. It functions as a key tool to support IGR's aim of representing and promoting the socio-economic, ecological, cultural, and political interests of workers around Lake Constance⁴⁶⁵.

8.19.2. Practice Overview

IGR Bodensee was established in June 2002⁴⁶⁶ by an association of national trade union groups in Germany, Switzerland, Austria, and Liechtenstein⁴⁶⁷. Since 2016, IGR Bodensee has implemented a **joint annual press tour across the four member countries in the region of Lake Constance**. The annual press tour supports the organisation's objectives to:

- secure employment opportunities in the region,
- sustain the region as an attractive economic area and improve the ecological situation,
- increase the quality of life and development opportunities, and
- strengthen cross-border cooperation⁴⁶⁸.

It does so by raising awareness at the regional and national levels of challenges experienced by the interconnected labour market in the Lake Constance region. Through coordinated communication activities such as the press tour, IGR Bodensee also provides key information to the coordinating committee of the European Trade Union Confederation (EUTC), ultimately contributing to refining EUTC positions on regional policies of the European Union (EU)⁴⁶⁹.

The main **target group** featured in the annual press tour and other activities organised by IGR Bodensee is the **regional workforce around Lake Constance**, which is highly interconnected due to the lack of language barriers and freedom of movement in the cross-border region. Based on statistics compiled for the International Conference Lake

⁴⁶⁵ IGR Bodensee, 2002a.

⁴⁶⁶ IGR Bodensee, 2022b.

⁴⁶⁷ Specifically, these include the German Confederation of Trade Unions (DGB) Districts Baden Wuerttemberg and Bavaria (*Deutscher Gewerkschaftsbund Bezirk Baden Wuerttemberg and Bezirk Bayern*), the Austrian Trade Union Federation (ÖGB) County Vorarlberg (*Österreichischer Gewerkschaftsbund, Landesorganisation Vorarlberg*), the Trade Union Federations of the Cantons St. Gallen, Thurgau, Schaffhausen, Zurich, Appenzell AR, Glarus and Graubünden, Travail.Suisse St. Gallen and Thurgau, and the Liechtenstein Employees Association (LANV, *Liechtensteinischer ArbeitnehmerInnenverband*).

⁴⁶⁸ IGR Bodensee, 2002a.

⁴⁶⁹ Ibid.

Constance, out of the 2.3 million workers in employment in the Lake Constance region, 74% are employed in the service sector, 25% in the manufacturing industry, and 2% in agriculture. With 666,000 workers in employment, the sector 'public and other services, education, and health' is the largest single sector⁴⁷⁰.

Between 2010 and 2021, the number of cross-border workers has increased from 2.1 to 2.6% of the total regional workforce. However, in some riparian states (including Liechtenstein), they play a key role in the national labour market. For instance, in Liechtenstein, cross-border workers made up 55.9% of the total national workforce in 2021 (up from 50.9% in 2010)⁴⁷¹. Topics such as the Covid-19 pandemic or the shortage of skilled labour affect the interconnected regional labour market and are highlighted during the annual press tour.

IGR Bodensee follows a democratic process to identify a key topic for the press tour: the IGR executive committee (comprised of the President, Vice Presidents, and other key representatives) suggests potential topics that are discussed and subsequently agreed upon in the joint member meetings. Representatives from the regional member organisations then prepare communication materials and recommendations specific to their region, which are integrated into a joint narrative by a press officer. Although D&I considerations are not always made explicit, they are a key building block of the material designed for the press tour⁴⁷². A press conference with regional and national news outlets is organised in each of the four member countries. These usually take place on two consecutive days on the premises of the respective national or regional trade union group, with two countries covered in one day. Trade union representatives from each member country of the IGR Bodensee attend every press conference. The press conferences are followed by an internal meeting of the executive committee to reflect on the implementation and reception of the press tour.

8.19.3. Good practice achievements and impact

Reception by regional and national news outlets has been positive, and follow-up coverage of the annual press tour was published⁴⁷³. While it must be acknowledged that IGR Bodensee does not formally measure the impacts and achievements of the press tour, it is estimated that each press conference is attended by two to five regional and national news outlets, which then continue to publish between two and five articles and/or broadcast follow-up interviews with IGR Bodensee in each country. In Liechtenstein, the reach is thought to be more limited due to its size, but two main national newspapers tend to publish articles on the topics discussed during the press conference, accompanied by a radio interview with the President of the Liechtenstein Employees Association (LANV)⁴⁷⁴.

The organisation has aimed to cover **a wide range of topics relevant to all four member countries** since the introduction of the press tour in 2016 (with the exception of 2020, when the press tour was cancelled due to the Covid-19 pandemic). D&I considerations often played a crucial role in the communication materials prepared for the press tour, including:

- 2016: The situation of refugees and the challenges associated with their integration into the national and regional labour market⁴⁷⁵;

⁴⁷⁰ Arbeitsgruppe Statistikplattform Bodensee der Internationalen Bodensee-Konferenz, 2021, p. 4.

⁴⁷¹ Statistikplattform Bodensee, 2021, p. 2.

⁴⁷² GP_19_ORG INT.

⁴⁷³ GP_19_ORG_INTL Kronen Zeitung, 2023.

⁴⁷⁴ Email correspondence with GP_19_ORG, 2024.

⁴⁷⁵ IGR Bodensee, 2016.

- 2017: The move towards flexible working hours and the maintenance of occupational health and safety standards⁴⁷⁶;
- 2018: Improving the compatibility of family responsibilities and work, including issues related to parental leave, care, hybrid working models, etc⁴⁷⁷;
- 2019: The need to adjust and promote workers' training and further education to meet demands posed by increased digitalisation in the workplace⁴⁷⁸;
- 2021: The impacts of the Covid-19 pandemic on the regional labour market and mitigating strategies, for example, job support schemes (*Kurzarbeit*), working from home, and unemployment benefits⁴⁷⁹;
- 2022: The need to increase real wages to match inflation alongside other measures to mitigate the pressures on workers in the cross-border region⁴⁸⁰;
- 2023: The challenges posed by the shortage of skilled labour and potential solutions to address this, such as improved integration of workers of key characteristics into the labour market (gender, age, racial or ethnic origin, or nationality, etc.)⁴⁸¹.

The **success of the press tour is thought to depend on the relevance of the topic and its ability to respond to key ongoing debates in the riparian states (including Liechtenstein)**. If no suitable topic is identified, the press tour, which usually takes place during summer recess, may be delayed (as in 2024). IGR Bodensee also trialled other communication activities, such as online webinars; however, uptake was low compared to the much wider attended press tours which led to coverage in regional and national news outlets⁴⁸².

8.19.4. Transferability and Lessons Learnt

The press tour has provided an opportunity for **cost-effective internal and external knowledge exchanges** between the trade union groups in Austria, Germany, Liechtenstein, and Switzerland, and the regional press. In addition to raising wider awareness of the challenges affecting workers and the interconnected labour market in the Lake Constance region, it also **enhanced mutual understanding** of the situation in each member country among the trade union groups⁴⁸³.

This type of communication campaign has a **high potential for transferability** to different cross-border contexts that feature highly interconnected labour markets. IGR Bodensee highlighted that it is an effective measure that can be easily developed and implemented at relatively low costs by using existing infrastructure (e.g. rooms provided by the respective in-country trade union association).

However, IGR Bodensee also acknowledged its advantageous position in a cross-border context where language barriers do not exist. Having to translate press tour materials and

⁴⁷⁶ IGR Bodensee, 2017.

⁴⁷⁷ IGR Bodensee, 2018.

⁴⁷⁸ IGR Bodensee, 2019.

⁴⁷⁹ IGR Bodensee, 2021.

⁴⁸⁰ IGR Bodensee, 2022.

⁴⁸¹ IGR Bodensee, 2023.

⁴⁸² GP_19_ORG INT.

⁴⁸³ Ibid.

interpret press conferences would increase the effort and financial resources needed to implement it⁴⁸⁴.

⁴⁸⁴ Ibid.

8.20. Inclusive Communication – IMS Luxembourg

8.20.1. Introduction

The Inclusive Communication practice at IMS Luxembourg has achieved progress in embedding inclusivity and accessibility across its **internal and external communication** processes. Introduced as part of the 2023–2024 Diversity Plan, the practice focuses on standardising inclusive language, improving accessibility, and fostering cultural shifts within the organisation. Key accomplishments include the development of an editorial guide, the adoption of accessible formats, and integrating inclusivity into recruitment, event planning, and public-facing materials. Despite challenges such as limited financial resources, IMS successfully implemented the practice by leveraging internal expertise and aligning it with the organisation's broader strategy. This initiative demonstrates IMS's commitment to creating a more inclusive organisational culture while providing a scalable model for other organisations⁴⁸⁵.

8.20.2. Practice Overview

The Inclusive Communication practice was introduced to standardise the use of inclusive language and ensure communication accessibility both internally and externally. Communication accessibility, in the context of IMS Luxembourg's inclusive communication practices, refers to ensuring both internal and external communications are inclusive and accessible. This includes using inclusive language, accessible fonts compatible with screen readers, and adapting communication channels to accommodate diverse needs. The practice aims to embed inclusivity into organisational processes, aligning with IMS Luxembourg's broader commitment to diversity and the six articles of the Diversity Charter.

This practice was implemented in Luxembourg within IMS Luxembourg, a small non-profit organisation specialising in corporate social responsibility (CSR). The practice was formalised in early 2023 as part of IMS's two-year Diversity Plan.

The practice applies to all IMS Luxembourg employees, including full-time and part-time staff, across various roles. It also **extends to external stakeholders** such as event participants and audiences of IMS's communications. Efforts are made to ensure **equitable access to opportunities and accommodations**, such as **clear internal communication channels, inclusive language** in job postings, and **adjustments for mobility** or dietary requirements at events.

The practice was developed **entirely in-house** without a dedicated budget. It involved the communications team and broader staff in designing policies, guides, and KPIs to ensure inclusive communication. Internal measures included creating **onboarding materials** and **training sessions** for employees, while external measures focused on **adapting imagery, language**, and **document accessibility** to align with inclusive principles. The implementation process will **culminate in a formal evaluation in 2025 to assess progress** and inform future practices.

8.20.3. Good practice achievements and impact

The Inclusive Communication practice at IMS Luxembourg has made significant impact in promoting inclusivity and accessibility within the organisation's internal and external

⁴⁸⁵ GP_18_ORG INT.

communication processes. Implemented as part of the 2023–2024 Diversity Plan, the initiative reflects IMS's dedication to fostering clarity and inclusivity throughout its operations.

Internally, the practice has successfully standardised the use of inclusive language, addressing the complexities of implementing these principles in French. Key accomplishments include the creation of an editorial guide, the adoption of accessible fonts compatible with screen readers, and the development of training materials to ensure that all employees are equipped to apply inclusive practices. These measures have been incorporated into daily operations, including onboarding processes, ensuring a seamless integration of inclusivity into the organisation's culture.

Evidence of these outcomes is supported by the development and application of specific tools and processes, such as the editorial guide for inclusive language, accessible fonts, and training materials integrated into onboarding procedures. These achievements are evaluated through a structured diversity plan, which includes mid-programme informal evaluations and a formal assessment scheduled for early 2025. The evaluations involve reviewing Key Performance Indicators (KPIs), such as the active use of inclusive language documents and employee training completion, alongside feedback from staff to ensure the outcomes align with the organisation's inclusivity objectives.

Externally, IMS has embedded inclusivity into its public-facing materials. Reports, event documentation, and other communications now include diverse imagery, abstract visuals to avoid stereotyping, and disclaimers in complex documents, such as the barometer report, to address linguistic constraints. The growing voluntary adoption of pronouns in email signatures is an outcome reflecting a cultural shift within the organisation toward greater awareness and acceptance of inclusive practices.

The practice has also **extended inclusivity to recruitment and event planning**. Job postings now **explicitly highlight IMS's commitment** to being an inclusive employer and its openness to accommodating candidates' specific needs. Additionally, events are designed to be **accessible**, with **provisions for mobility support, dietary requirements** based on allergies **or ethical preferences**, and other necessary adjustments.

Several factors contributed to the success of this initiative. The expertise and dedication of IMS's communication team played a pivotal role in developing and implementing the practice, ensuring that inclusive policies were **integrated effectively despite financial constraints**. Aligning the Inclusive Communication practice with IMS's broader organisational strategy further facilitated its adoption, enabling efficient resource allocation and ensuring consistency with existing priorities.

However, the practice was not without challenges. **Limited financial resources restricted certain initiatives**, such as the use of non-gendered voices in videos and the development of a fully accessible website. To overcome these constraints, **IMS relied on in-house expertise**, leveraging its team's skills to achieve key objectives. Time and cultural adaptation also posed challenges, as reinforcing inclusive communication principles required significant effort. IMS addressed this by identifying strategic opportunities to reiterate messages and provide ongoing training.

The Inclusive Communication practice has already delivered measurable benefits, creating a strong foundation for future D&I efforts at IMS Luxembourg. As the organisation prepares for a formal evaluation in 2025, it remains committed to adapting and refining these practices to ensure their continued relevance and impact. This initiative demonstrates IMS's proactive approach to fostering a truly inclusive organisational culture.

8.20.4. Transferability and Lessons Learnt

The Inclusive Communication practice at IMS Luxembourg demonstrates considerable potential for transferability to other organisations and contexts. Its success is **rooted in its adaptability and resource-efficient implementation**, making it accessible for organisations of varying sizes and resource levels. By integrating this practice into its broader Diversity Plan, IMS has shown how inclusive communication can be effectively embedded within an organisation's existing strategy, ensuring alignment with operational priorities.

One of the key lessons from IMS's approach is the value of **focusing on processes rather than proprietary documents**. While IMS does not share its internal documents, it actively shares the methodologies and steps it used to develop and implement the practice. This includes providing insights through **events and networks**, such as the inclusive language diversity network, where IMS representatives exchanged ideas and shared practical applications of their strategies. This **openness to collaboration** has facilitated the dissemination of best practices and inspired other organisations to adapt similar approaches.

Another important lesson is the need for **leadership support and team engagement**. The communication team's expertise and enthusiasm were instrumental in the practice's success, demonstrating the importance of leveraging internal talent. Aligning the initiative with IMS's overall strategy also allowed the organisation to **overcome resource constraints** and make significant progress despite limited finances.

However, challenges such as **financial limitations and time constraints** highlight the need for flexibility and prioritisation. IMS addressed these obstacles by focusing on achievable goals and adapting existing resources to meet its objectives. For example, the organisation relied on its staff's expertise to implement the practice and tailored its communication strategies to maximise inclusivity within budgetary constraints.

The Inclusive Communication practice offers a scalable model for organisations aiming to enhance inclusivity in their communication processes. By sharing their experiences and fostering knowledge exchange, IMS Luxembourg has provided a valuable framework that other organisations can adapt to their unique contexts and challenges. This practice underscores the importance of continuous learning, collaboration, and strategic alignment in advancing D&I goals.

9. Annex B: Relevant regulatory and policy initiatives

Table B-1. Relevant regulatory and policy initiatives

Policy Initiative or	Description	Applicability to D&I
Corporate Sustainability Due Diligence Directive (CSDDD) ⁴⁸⁶	An EU regulation requiring large companies (≥ 500 employees; \geq revenue of €150 million) to identify, mitigate, prevent, and account for environmental risks and human rights within their supply chain. It mandates due diligence, integration of sustainable practices into governance, and climate transition plans, with enforcement through penalties or liability.	<ul style="list-style-type: none"> • Broader expansion of policies to ensure D&I across hiring practices, partners and suppliers. • Requiring companies to assess and address discrimination risks within supply chains. • Implement supplier diversity programmes and enforce inclusive labour practices. • Mitigation of risks related to discrimination or exclusion throughout the business chain.
Corporate Sustainability Reporting Directive (CSRD) ⁴⁸⁷	An EU regulation requiring large and listed companies to disclose information regarding environmental, social, and governance (ESG) risks, opportunities and impacts. It provides standardised reporting rules to enhance transparency, assess sustainability performances, and support the EU Green Deal.	<ul style="list-style-type: none"> • Disclosure of D&I policies to mandate action. • Companies must report workforce diversity data (e.g. gender, disability, racial or ethnic origin). • Companies must disclose policies on inclusive leadership, equal pay, and accessibility for underrepresented groups. • Reporting of diversity metrics (where possible) and benchmarking progress against EU-wide targets.
Directive on “Empowering Consumers for the Green Transition” ⁴⁸⁸	An EU Directive aiming to help consumers make sustainable choices by providing clear and accurate environmental information on products, incentivising eco-friendly consumption, repairability,	<ul style="list-style-type: none"> • Alignment of sustainable consumer practices with inclusive hiring and workplace policies. • Integrating D&I goals into corporate sustainability strategy.

⁴⁸⁶ European Commission, 2024; KPMG, 2024.

⁴⁸⁷ Official Journal of the European Union, 2022.

⁴⁸⁸ European Parliament, 2024.

Policy Initiative or	Description	Applicability to D&I
	and protection from greenwashing or premature obsolescence.	
European Sustainability Reporting Standards (ESRS) ⁴⁸⁹	A set of guidelines developed under the CSRD Directive to standardise sustainability reporting across EU companies, ensuring the provision of clear, consistent and comparable information regarding ESG performance.	<ul style="list-style-type: none"> • Companies required to report D&I metrics such as gender balance, pay equality, diversity of leadership. • Driver of greater accountability in workplace policies. • Integration of D&I into corporate sustainability reports to showcase progress and outcomes. • Leveraging ESRS guidelines to track progress within D&I initiatives. • ESRS requires transparent reporting on the representation of marginalised groups in leadership, progress on gender pay gap reductions, and progress of workplace inclusivity.
Green Claims Directive ⁴⁹⁰	A proposed EU regulation ensuring the credibility and transparency of environmental claims (“30% recycled packaging” etc.) can be substantiated and verified.	<ul style="list-style-type: none"> • Encourage companies to make social sustainability claims alongside environmental ones. • Companies encouraged to substantiate social sustainability claims, including fair labour practices, minority-owned business partnerships, and equitable supply chains. • Demonstrate how products or services contribute to societal goals. • Integrating diversity into workplace practices and public commitments. • Mandate for verifiable social claims regarding D&I efforts.

⁴⁸⁹ European Commission, 2023a.

⁴⁹⁰ European Commission, 2023b; European Commission, 2023c.

Policy Initiative or	Description	Applicability to D&I
Sustainable Development Goals (SDGs) ⁴⁹¹	A set of 17 global objectives adopted by the United Nations (UN) to address global issues like poverty, inequality, climate and environmental degradation, and justice. The EU has aligned its policies and strategies to promote SDGs within the development of its businesses.	<ul style="list-style-type: none"> • Guiding workplace policies focused on eliminating discrimination, gender parity, inclusive hiring practices and career development • SDGs provide a framework for companies to implement targeted D&I actions, such as gender hiring (SDG 5), disability inclusion strategies (SDG 10), and fair wages and career development for diverse employees (SDG 8). • Use SDGs to set specific guidelines and targets to ensure commitment.

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⁴⁹¹ European Commission, no date; See also United Nations, no date

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10. Annex C: Interview Information

Table C-1 – Allocation of interviewees across tasks

Interviewee Name	Interview Code	Task 1	Task 2	Task 3a	Task 3b
An author of a book on D&I and a D&I coach	INT-1	✓	×	×	×
A trade union representative in the education sector	INT-2	✓	×	×	×
Diversity Council Australia	INT-3	✓	×	×	×
A holding company that manages a network of hospitals in a Western European Member State.	INT-4	✓	×	×	×
An umbrella organisation in a Central European Member State (but not a National Diversity Charter) for companies implementing policies for LGBTIQ employees.	INT-5	✓	×	×	×
Prince Philippe Fund	INT-6	✓	✓	×	×
An academic in a Central European Member State (economist) with	INT-7	✓	×	×	×

extensive experience of D&I.					
An academic in the United States with extensive experience of unintended consequences of D&I policies.	INT-8	✓	×	×	×
An advocate of LGBTIQ rights in the workplace in a Central European EU Member State with experience of international companies.	INT-9	✓	×	×	×
SER (Dutch Diversity Charter)*	CH_NL_1	×	✓	✓	×
Diversity Charter Ireland	CH_IE_1	×	×	✓	×
Fundacion Diversidad*	CH_ES_1	×	✓	✓	×
Diversity Charter Greece	CH_EL_1	×	×	✓	×
Diversity Charter Germany	CH_DE_1	×	×	✓	×
Business for Society and Czech Diversity Charter	CH_CZ_1	×	×	✓	×
Diversity Charter in Lithuania	CH_LT_1	×	×	✓	×
FOB (Polish Diversity Charter)*	CH_PL_1	×	✓	✓	×
Pari Opportunità, Carta	CH_IT_1	×	×	✓	×

Estonian Human Rights Centre (Diversity Charter in Estonia)	CH_EE_1	x	x	✓	x
An energy provider Signatory to a Northern European Charter	SIG_SE_1	x	x	x	✓
A recruitment and marketing Signatory to a Western European Charter	SIG_NL_1	x	x	x	✓
A regulatory governmental body Signatory to an Eastern European Charter	SIG_HR_1	x	x	x	✓
A forestry and land development Signatory to a Northern European Charter	SIG_FI_1	x	x	x	✓
A large banking Signatory to a Southern European Charter	SIG_ES_1	x	x	x	✓
A humanitarian crisis Signatory to a Southern European Charter	SIG_EL_1	x	x	x	✓
A social care and rehabilitation Signatory to an Eastern European Charter	SIG_EE_1	x	x	x	✓
A large shipping Signatory to a Western European Charter	SIG_DK_1	x	x	x	✓

A Signatory to an Eastern European Charter	SIG_LT_1	x	x	x	✓
An energy provider Signatory to a Southern European Charter	SIG_CY_1	x	x	x	✓
A telecommunications Signatory to an Eastern European Charter*	SIG_PL_1	x	✓	x	✓
A DEI based consultancy Signatory to an Eastern European Charter	SIG_PL_2	x	x	x	✓
An umbrella trade union Non-Signatory in Western European Region	NON-SIG_D_1	x	x	x	✓
A networking Signatory to a Southern European Charter*	SIG_IT_1	x	✓	x	✓
A corporate strategist and consultancy Signatory to a Southern European Charter*	NON_SIG_IT_1	x	✓	x	✓
HVO-Querido	GP_1_ORG	x	✓	x	x
HVO-Querido	GP_1_WRK	x	✓	x	x
A canned fruit and vegetable production company	GP_2_WRK	x	✓	x	x

A canned fruit and vegetable production company	GP_2_ORG	x	✓	x	x
Akava	GP_3_ORG	x	✓	x	x
Akava (Worker Representative)	GP_3_WRK	x	✓	x	x
A corporate strategist and consultancy Signatory to a Southern European Charter *	GP_4_ORG	x	✓	x	x
A worker representative of a corporate strategist and consultancy Signatory to a Southern European Charter	GP_4_WRK	x	✓	x	x
EnterprisInGirls*	GP_5_ORG	x	✓	x	✓
EnterprisInGirls (Worker Representative)	GP_5_WRK	x	✓	x	x
Communication company (PL)	GP_6a_WRK	x	✓	x	x
Financial company (PL)	GP_6b_WRK	x	✓	x	x
COFIDES S.A., S.M.E	GP_7_WRK	x	✓	x	x
COFIDES S.A., S.M.E	GP_7_ORG	x	✓	x	x
An international automotive	GP_8_WRK	x	✓	x	x

industry organisation					
An international automotive industry organisation	GP_8_ORG	x	✓	x	x
SER (Dutch Diversity Charter)*	GP_9_ORG	x	✓	✓	x
Province Noord-Holland	GP_9_WRK	x	✓	x	x
Financial company (FR)	GP_10_WRK	x	✓	x	x
Financial company (FR)	GP_10_ORG	x	✓	x	x
Fundacion Diversidad*	GP_11_ORG	x	✓	✓	x
Prince Philippe Fund*	GP_12_WRK	✓	✓	x	x
Prince Philippe Fund	GP_12_ORG	x	✓	x	x
Oracle	GP_13_WRK	x	✓	x	x
Oracle	GP_13_ORG	x	✓	x	x
Correos	GP_14_ORG	x	✓	x	x
Toyota Europe	GP_15_ORG	x	✓	x	x
Business support and networking organisation Ireland	GP_17_ORG	x	✓	x	x
IMS Luxembourg	GP_18_ORG	x	✓	x	x
IGR Bodensee	GP_19_ORG	x	✓	x	x

Total interviews:	64
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Note: A * indicates that an organisation was interviewed more than once and on separate tasks. FOB are referred to as both GP_6_ORG and CH_PL_1 due to their interview for Task 3a (CH_PL_1 respectively) being used to construct the *Diversity IN Check* narrative.

11. Annex D: Supporting information and data from Section 5

The literature search was carried out in Google Scholar using keywords related to the diversity dimension (e.g. sex, racial or ethnic origin, disability, religion and belief, neurodiversity, LGBTIQ, etc.), recruitment and retention (e.g. recruitment, hiring, retention, turnover, etc.), diversity policies (e.g. diversity management, diversity, inclusion, DEI, etc.).

The search returned 28 useful papers, of which 25 were scientific papers and 3 were grey literature reports. Some sources focused on multiple diversity dimensions or did not emphasise a specific dimension. Such studies usually contained surveys analysing the response of respondents to certain D&I policies or literature reviews. The rest of the discovered studies focused on a specific diversity dimension. Sex, racial or ethnic origin, LGBTIQ were often investigated in the papers. Fewer papers explored how persons of different ages, religions and beliefs responded to various D&I policies. The least studied diversity dimensions in the sample of discovered papers covered disability, mental illness and neurodiversity.

Table D-1. Overview of themes in papers on recruitment and retention

Diversity dimension	Process (no. of papers)*	Total no. of papers*
Sex	Recruitment (1) Retention (5) Recruitment & retention (1)	7
Racial or ethnic origin	Recruitment (1) Retention (5) Recruitment & retention (1)	7
Multiple diversity dimensions	Recruitment (4) Recruitment & retention (1)	5
LGBTIQ	Recruitment (1) Retention (1) Recruitment & retention (2)	4
Age	Retention (3)	3
Religion and beliefs	Retention (2)	2
Disability	Retention (1)	1
Mental illness	Retention (1)	1
Neurodiversity	Recruitment (1)	1

*Note: *the number of papers mentioned in the table exceeds the total number of discovered publications because one study might have focused on several diversity dimensions or several processes*

The recruitment and retention processes are both explored through the lenses of diversity policies, yet retention received more attention than recruitment. Sixteen papers focused on retention, eight on recruitment, and four addressed both themes simultaneously. While most studies adopted sector-specific scopes, particularly in areas like hospitality, retail, IT, and education, a significant portion examined diversity across national or international contexts.

11.1.1.1. Summary of literature on performance

The literature search was carried out in Google Scholar using keywords related to the diversity dimension (e.g., sex, racial or ethnic origin, disability, religion and belief, neurodiversity, LGBTIQ, etc.), performance (e.g. work performance, KPIs), diversity policies (e.g. diversity management, diversity, inclusion, DEI, etc.).

The search returned nine useful papers, of which five are scientific papers and four were grey literature reports. Most sources focus on multiple diversity dimensions or do not emphasise a specific dimension. Sex is the most investigated dimension in the papers that focus on a specific dimension. There is one paper for each of the following diversity dimensions: racial or ethnic origin, LGBTIQ, and neurodiversity. No papers dealing specifically with age, religion, disability and mental health have been identified.

Table D-2. Overview of themes in papers on performance

Diversity dimension	Total no. of papers
Sex	2
Racial or ethnic origin	1
Multiple diversity dimensions	4
LGBTIQ	1
Age	0
Religion and beliefs	0
Disability	0
Mental illness	0
Neurodiversity	1

The performance aspect is the third most extensively researched topic, with nine useful papers. Sex is the most investigated dimension, and multiple diversity dimensions are frequently included. This indicates a strong evidence base for the impact of D&I on organizational performance metrics.

11.1.1.2. Summary of literature on innovation and creativity

The literature search was carried out in Google Scholar using keywords related to the diversity dimension (e.g. sex, racial or ethnic origin, disability, religion and belief, neurodiversity, LGBTIQ, etc.), innovation & creativity, diversity policies (e.g. diversity management, diversity, inclusion, DEI, etc.).

The search returned ten useful papers, of which seven are scientific papers and three are grey literature reports. Most sources focus on multiple diversity dimensions or do not emphasise a specific dimension. Sex and neurodiversity are the only diversity dimensions investigated in a specific context, appearing in one study each. No papers were found dealing specifically with racial or ethnic origin, LGBTIQ age, religion, disability, or mental health.

Table D-4. Overview of themes in papers on innovation and creativity

Diversity dimension	Total no. of papers
Sex	1
Racial or ethnic origin	0
Multiple diversity dimensions	8
LGBTIQ	0
Age	0
Religion and beliefs	0
Disability	0
Mental illness	0
Neurodiversity	1

The relationship between diversity and innovation is critically underexplored, with only ten papers identified (seven scientific, three grey literature). These papers highlight cognitive diversity as a driver of innovation by mitigating groupthink and enhancing problem-solving. However, most diversity dimensions, including racial or ethnic origin, LGBTIQ, age, religion, disability, and mental health, are not addressed individually. The existing research primarily focuses on multiple dimensions, sex and neurodiversity, leaving significant gaps in understanding how other diversity dimensions contribute to creative outcomes. This highlights an urgent need for broader studies to uncover the mechanisms by which different aspects of diversity influence innovation.

11.1.1.3. Summary of literature on problem solving and decision-making

The literature search was carried out in Google Scholar using keywords related to the diversity dimension (e.g. sex, racial or ethnic origin, disability, religion and belief, neurodiversity, LGBTIQ, etc.), problem solving decision-making, diversity policies (e.g. diversity management, diversity, inclusion, DEI, etc.).

The search returned four useful papers, of which one is a scientific paper and three are grey literature reports. Two sources focus on multiple diversity dimensions or do not emphasise a specific dimension. Sex is the most investigated diversity dimension, appearing in two studies. There are no papers specifically addressing racial or ethnic origin, LGBTIQ, age, religion, disability, mental health, or neurodiversity.

Table D-5. Overview of themes in papers on problem solving/decision making

Diversity dimension	Total no. of papers
Sex	2
Racial or ethnic origin	0
Multiple diversity dimensions	2
LGBTIQ	0
Age	0

Religion and beliefs	0
Disability	0
Mental illness	0
Neurodiversity	0

Despite the critical role of diversity in enhancing decision-making processes, only four papers examine this topic (one scientific, three grey literature). Sex is the most researched dimension, emphasizing its impact on improved decision-making and group dynamics. However, racial or ethnic origin, LGBTIQ, age, religion, disability, mental health, and neurodiversity are completely unaddressed. Current studies fail to explore how diverse perspectives beyond gender can mitigate biases and foster robust decision-making in complex organizational settings. Expanding research in this area would offer valuable insights into how underrepresented dimensions shape decision-making quality.

11.1.1.4. Summary of literature on company reputation

The literature search was carried out in Google Scholar using keywords related to the diversity dimension (e.g. sex, racial or ethnic origin, disability, religion and belief, neurodiversity, LGBTIQ, etc.), company reputation, diversity policies (e.g. diversity management, diversity, inclusion, DEI, etc.).

The search returned ten useful papers, of which five are scientific papers and five are grey literature report. Most sources focus on multiple diversity dimensions or do not emphasize a specific dimension. There are two papers addressing sex and two papers addressing racial or ethnic origin. No papers specifically deal with LGBTIQ, age, religion, disability, mental health, or neurodiversity.

Table D-6. Overview of themes in papers on company reputation

Diversity dimension	Total no. of papers
Sex	2
Racial or ethnic origin	1
Multiple diversity dimensions	7
LGBTIQ	0
Age	0
Religion and beliefs	0
Disability	0
Mental illness	0
Neurodiversity	0

The relationship between diversity and company reputation is relatively well-researched, with ten papers identified (five scientific, five grey literature). The studies highlight the positive connection between workplace diversity and enhanced corporate image, focusing on racial or ethnic origin, sex, and multiple diversity dimensions. Organizations with diverse executive leadership and boards are perceived as more socially responsible, which boosts public trust, investor confidence, and customer loyalty.

However, despite this relatively broad focus, there are still gaps. LGBTIQ, age, religion, disability, mental health, and neurodiversity remain unexplored, leaving an incomplete understanding of how these dimensions impact reputation. Existing studies emphasise race and gender diversity but do not address other critical aspects of diversity, such as religion or the experiences of individuals with disabilities.

11.1.1.5. Summary of literature on customer satisfaction

The literature search was carried out in Google Scholar using keywords related to the diversity dimension (e.g. sex, racial or ethnic origin, disability, religion and belief, neurodiversity, LGBTIQ, etc.), customer satisfaction, diversity policies (e.g. diversity management, diversity, inclusion, DEI, etc.).

The search returned three useful papers, of which two are scientific papers and one is a grey literature report. Most sources focus on multiple diversity dimensions or do not emphasise a specific dimension. There is one paper addressing racial or ethnic origin, while no papers specifically focus on sex, LGBTIQ, age, religion, disability, mental health, or neurodiversity.

Table D-7. Overview of themes in papers on customer satisfaction

Diversity dimension	Total no. of papers
Sex	0
Racial or ethnic origin	1
Multiple diversity dimensions	2
LGBTIQ	0
Age	0
Religion and beliefs	0
Disability	0
Mental illness	0
Neurodiversity	0

Customer satisfaction and its link to diversity are underrepresented, with only three papers identified (two scientific, one grey literature). The studies primarily focus on racial or ethnic origin and multiple dimensions, demonstrating that diverse teams better understand and address the needs of multicultural customer bases. However, there is no research on other critical dimensions, such as sex, LGBTIQ, age, religion, disability, mental health, or neurodiversity. The limited scope hinders a comprehensive understanding of how diversity influences customer loyalty, service quality, and brand perception. Expanding this research could provide actionable insights for companies operating in diverse markets.

11.1.1.6. Summary of literature on organisational culture

The literature search was carried out in Google Scholar using keywords related to the diversity dimension (e.g. sex, racial or ethnic origin, disability, religion and belief, neurodiversity, LGBTIQ, etc.), organisational culture, diversity policies (e.g. diversity management, diversity, inclusion, DEI, etc.).

The search returned two useful papers, of which one is a scientific paper and one is a grey literature report. One source focuses on multiple diversity dimensions or do not emphasise a specific dimension. There is one paper addressing racial or ethnic origin, while no papers specifically focus on sex, LGBTIQ, age, religion, disability, mental health, or neurodiversity.

Table D-8. Overview of themes in papers on organisational culture

Diversity dimension	Total no. of papers
Sex	0
Racial or ethnic origin	1
Multiple diversity dimensions	1
LGBTIQ	0
Age	0
Religion and beliefs	0
Disability	0
Mental illness	0
Neurodiversity	0

This topic is significantly under-researched, with only two papers identified (one scientific, one grey literature). The studies focus on racial or ethnic origin as well as multiple dimensions, examining how D&I policies influence organizational norms and employee behaviour. However, there is no coverage of sex, LGBTIQ, age, religion, disability, mental health, or neurodiversity. This lack of focus limits understanding of how D&I policies drive structural changes and foster inclusive workplace cultures.

11.1.1.7. Summary of literature on fairness/equity (wider fairness case)

The literature search was carried out in Google Scholar using keywords related to the diversity dimension (e.g. sex, racial or ethnic origin, disability, religion and belief, neurodiversity, LGBTIQ, etc.), fairness/equity (e.g. fairness, equity, equality etc.), diversity policies (e.g., diversity management, diversity, inclusion, DEI, etc.).

The search returned three useful papers, all of which focused on multiple diversity dimensions. No papers specifically address sex, racial or ethnic origin, LGBTIQ, age, religion, disability, mental health, or neurodiversity. Please note that the number of papers identified in this section for fairness/equity does not include papers that have made a mixed case where fairness and equity is one of the supporting arguments.

Table D-9. Overview of themes in papers on fairness/equity

Diversity dimension	Total no. of papers
Sex	0
Racial or ethnic origin	0
Multiple diversity dimensions	3
LGBTIQ	0

Diversity dimension	Total no. of papers
Age	0
Religion and beliefs	0
Disability	0
Mental illness	0
Neurodiversity	0

Fairness and equity are moderately researched, with three papers focusing on multiple dimensions. However, none of the studies address individual dimensions such as sex, racial or ethnic origin, LGBTIQ, age, religion, disability, or mental health. The broad focus on multiple dimensions limits understanding of how specific diversity categories influence equity-related outcomes. Targeted research is needed to identify the unique challenges faced by underrepresented groups and to develop tailored strategies that promote fairness in workplaces and society.

12. Annex E: Classification of Member States by Region

Table E-1: Classification of Member States by region

Eastern Europe	Northern Europe	Southern Europe	Western Europe
Bulgaria	Denmark	Cyprus	Austria
Croatia	Finland	Greece	Belgium
Czechia	Sweden	Malta	France
Estonia		Portugal	Germany
Hungary		Spain	Ireland
Latvia			Italy
Lithuania			Luxembourg
Poland			Netherlands
Romania			
Slovakia			
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14. Annex G: Data and references from literature for Section 6

Table G-1: Categories covered by Charters (by region)

Category	Number of Member States				
	Eastern	Northern	Western	Southern	Total number
Gender, sex	9	2	4	1	16
Disability, abilities	8	2	4	1	15
Ethnic and racial origin	8	3	3	1	15
Age	10	2	1	1	14
Sexual orientation	9	1	3	1	14
Religion, belief	7	2	2	1	12
Other	5		2	1	8
Cultural background	4	1	2		7
Family composition/parental responsibilities	3	1	2		6
Nationality	3		2	1	6
LGBTIQ diversity	2	1	2		5
Social background	2	1	2		5
Educational diversity	3		1	1	5

Source: Literature review conducted as part of the study. See I. List of reference for Categories covered by Charters below. Note: It is important to note that data presented from the literature review presented here derives from multiple sources. These sources covered different individual and combinations of Member States. Where a particular category covered by a Member State was recorded in the literature, it is included in the table above. However, none of the sources

Category	Number of Member States				
	Eastern	Northern	Western	Southern	Total number
covered all Member States, so if some categories or topics related to D&I were not mentioned in these sources, it does not mean that the Diversity Charters do not cover these.					

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Table G-2: Charter Activities (by region)

Category	Number of Member States				
	Eastern	Northern	Western	Southern	Total number
Creation of D&I policies (actions plan and programmes)	9		2	4	15
Training	4	1	3	3	11
Awareness campaigns	4		2	3	9
Research and publications	5	2		1	8
Workshops, conferences, networking	5		1	1	7
Recruitment practices/HR policy	2			1	3
Support and mentoring to find jobs for refugees or migrants	2	1			3
Internal and external communication	1			1	2

Source: Literature review conducted as part of the study. See II. List of references for Charter Activities below.

Note: It is important to note that data presented from the literature review presented here derives from multiple sources. These sources covered different individual and combinations of Member States. Where a particular activity by a charter in a Member State was recorded in the literature, it is included in the table above. However, none of the sources covered all Member States, so if some activities were not mentioned in these sources, it does not mean that the Diversity Charters do not carry out these activities.

II. List of references for Charter Activities

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Table G-3: Information provided by Charters (by region)

Category	Number of Member States				
	Eastern	Northern	Western	Southern	Total number
Labour market analysis, statistics, publications	9	1	2	1	13
Best practices	7	3	3		13
Guidelines on D&I policy implementation	5	3	3	1	12
Legal advice	6	1			7
Other	4		1		5
Benefits and impacts of diversity	2	1	1		4
Support and mentoring to find jobs for refugees or migrants	2	1			3
Internal and external communication	1			1	2

Source: Literature review conducted as part of the study. See III. List of references for Information offered below.

Note: It is important to note that data presented from the literature review presented here derives from multiple sources. These sources covered different individual and combinations of Member States. Where information provided by a charter in a Member State was recorded in the literature, it is included in the table above. However, none of the sources covered all Member States, so if some information was not mentioned in these sources, it does not mean that the Diversity Charters do not carry out these activities.

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Table G-4: Advice and support provided by Charters (by region)

Category	Number of Member States				
	Eastern	Northern	Western	Southern	Total number
Advice on D&I	6		3	3	12
Training	1	1	2	3	7
Workshop, consultations	4		2		6
Inclusive language	3	2			5
Legal advice	4		1		5
Internal analysis, monitoring, reporting	2				2
Support for immigrants, refugees	1			1	2
Language	1			1	2
Other	2				2

Source: Literature review conducted as part of the study. See IV. List of references for Advice and support offered below.

Note: It is important to note that data presented from the literature review presented here derives from multiple sources. These sources covered different individual and combinations of Member States. Where advice and support provided by a charter in a Member State was recorded in the literature, it is included in the table above. However, none of the sources covered all Member States, so if some advice and support was not mentioned in these sources, it does not mean that the Diversity Charters do not provide these.

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Table G-5: Actions taken by organisations (by region)

Category	Number of Member States				
	Eastern	Northern	Western	Southern	Total number
Policies implementation	5	3	2	0	10
Training	5	2	0	1	8
Plans or strategies design	4	1	3	0	8
Commitments	5	1	1	0	7
Diversity committees or department	4	1	1	0	6
Gender parity	1	1	2	1	5
HR practices	3	0	1	0	4
Promotion of LGBTIQ diversity	1	1	2	0	4
Other	3	0	0	1	4
Support for working parents and diverse age groups	2	0	0	1	3
Flexible working	1	0	1	1	3
Support to refugees	2	0	0	0	2
External communications or reports	1	0	1	0	2

Source: Literature review conducted as part of the study. See V. List of references for Actions taken at organisation level as a result of membership and signatory to a Charter below.

Note: It is important to note that data presented from the literature review presented here derives from multiple sources. These sources covered different individual and combinations of Member States. Where actions taken in a Member State were recorded in the literature, they are included in the table above. However, none of the sources covered all Member States, so if some actions

Category	Number of Member States				
	Eastern	Northern	Western	Southern	Total number
were not mentioned in these sources, it does not mean that organisations did not take these actions in other Member States.					

V. List of references for Actions taken at organisation level as a result of membership and signatory to a Charter

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Table G-6: D&I categories most commonly included in policies and strategies at organisation level (by region)

Category	Number of Member States				
	Eastern	Northern	Western	Southern	Total number
Gender diversity	9		3	4	16
Disabilities, abilities	8	1	2	4	15
Age diversity	8	1	1	2	12
Racial or ethnic origin	5	1	3	3	12
Sexual orientation/gender identity	6	1		1	8
LGBTIQ diversity	2		1	2	5
Inclusive language	3	2			5
Other	2	1		2	5
Family composition/parental responsibilities	2			1	3
Cultural diversity			1	2	3
Religion	2			1	3
Migrant status	1			2	3
Nationality	1	1		1	3

Source: Literature review conducted as part of the study. See VI. List of references for D&I categories most commonly included in policies and strategies at organisation level below.

Note: It is important to note that data presented from the literature review presented here derives from multiple sources. These sources covered different individual and combinations of Member States. Where D&I categories were included in organisational policies and strategies in a Member State were recorded in the literature, they are included in the table above. However, none of the sources covered all Member States, so if categories were not mentioned in these sources, it does not mean that organisations did not include them in other Member States.

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Table G-7 Benefits arising from being a signatory to a Charter (by region)

Category	Number of Member States				
	Eastern	Northern	Western	Southern	Total number
Enhanced innovation and creativity	5	1	2	3	11
Improved employee engagement and retention	5	1	2	2	10
Enhanced organisational reputation	7	1	1	1	10
Positive atmosphere among employees and teams	6		2		8
Other	5	1	1	1	8
Improved employee satisfaction	4		1	1	6
Improved acquisition, knowledge, practices, talent skilled HR	3		1	1	5
Increased organisational competitiveness and performance	3		1		4
Compliance with legal requirements	3		1		4
Improved gender representation in leadership			1	2	3
Economic benefits (growth, productivity, opportunities, etc.)	1	1		1	3

Category	Number of Member States				
	Eastern	Northern	Western	Southern	Total number
Greater organisational resilience			1	2	3
Increased sense of belonging among underrepresented groups			1	2	3
Increased workforce diversity	1	1		1	3

Source: Literature review conducted as part of the study. See VII. List of references for Benefits/Impacts arising from being a signatory to a Charter below.

Note: It is important to note that data presented from the literature review presented here derives from multiple sources. These sources covered different individual and combinations of Member States. Where benefits/impacts were identified in a Member State were recorded in the literature, they are included in the table above. However, none of the sources covered all Member States, so if benefits were not mentioned in these sources, it does not mean that did not occur in other Member States.

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Table G-8 Areas of D&I found most challenging by organisations/signatories to charters (by region)

Category	Number of Member States				
	Eastern	Northern	Western	Southern	Total number
Unconscious bias or stereotypes	5	3		2	10
Resistance to change or lack of motivation	4	1	2	2	9
Integration D&I	4	3			7
Other	3	1	1	1	6
Gender equality	4		1		5
Measuring the impact of D&I	3	1		1	5
Ensuring consistent global implementation of D&I	1	1		2	4
Cultural differences	1	1	1		3
Integration of diverse groups	3				3
Age (youth or elderly)	2		1		3
Preventing unequal treatment and discrimination.	2				2
Sexual orientation/gender identity	1			1	2
Inclusion of people with disabilities	1		1		2

Category	Number of Member States				
	Eastern	Northern	Western	Southern	Total number

Source: Literature review conducted as part of the study. See VIII. List of references for Areas of D&I found most challenging by organisations/signatories to charters below.

Note: It is important to note that data presented from the literature review presented here derives from multiple sources. These sources covered different individual and combinations of Member States. Where challenging areas identified in a Member State were recorded in the literature, they are included in the table above. However, none of the sources covered all Member States, so if some areas were not mentioned in these sources, it does not mean that they were not challenging in other Member States.

VIII. List of references for Areas of D&I found most challenging by organisations/signatories to charters

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Table G-9 Barriers facing organisations to introducing or implementing a Charter and D&I policies (by region)

Category	Number of Member States				
	Eastern	Northern	Western	Southern	Total number
Insufficient resources	7	1	2		10
Resistance to change	5	3		2	10
Lack of awareness or belief	4	1	2	2	9
Lack of training	4	1	2		7
Difficulties in measuring the effectiveness of D&I policies	3	1		2	6
Lack of leadership support	4		2		6
Lack of understanding of D&I	4	1	1		6
Lack of expertise	5				5
Other	4			1	5
Legal constraints		1		2	3
Lack of data on underrepresented groups		1		2	3
Language barriers	1		1		2
Absence of formal processes for implementing D&I	2				2
Bureaucratic rigidity	1			1	2

Category	Number of Member States				
	Eastern	Northern	Western	Southern	Total number
Complexity integrating refugees	2				2
Stereotypes	2				2

Source: Literature review conducted as part of the study. See IX. List of references for Barriers facing organisations to introducing or implementing a Charter and D&I policies below.

Note: It is important to note that data presented from the literature review presented here derives from multiple sources. These sources covered different individual and combinations of Member States. Where barriers identified in a Member State were recorded in the literature, they are included in the table above. However, none of the sources covered all Member States, so if some barriers were not mentioned in these sources, it does not mean that they were not barriers in other Member States.

IX. List of references for Barriers facing organisations to introducing or implementing a Charter and D&I policies

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