

# Family-friendly offices: The policy, practice and legislative context

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for background to wider research study for BCO\*



10 February 2005

\* 'Getting it together: The work-life agenda and offices' published by BCO, September 2006

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## 1.0 PROJECT RATIONALE

### An everyday affair

'A' has worked in the same company for many years. 'A' would like some time off during the week to pursue a course in one of her favourite hobbies.	'G' is a parent of two young children. 'G' lives with his partner and they share childcare responsibilities, but he would like to spend more time with his children.	Returning to the city to care for his parents, 'M' has just found a new job. 'M' and his siblings all work and want to share in caring for their parents.
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- 'A', 'G' and 'M' all work in the same company. Their situations, and many, many others', indicate the variety of pressures and pulls that people experience associated with their life situation, including work and family. People have long had to juggle work responsibilities and family life. Latterly, time to pursue their personal interests has become a more pronounced and widespread expectation. People's aspirations and priorities vary, linked to factors personal interests, financial need, family circumstance. – and probably region.

### The question we will explore

- Opportunities and preferences may also be influenced by the built environment. The purpose of this paper is to provide background on the current status of family-friendly policies in the UK and a European context, to inform an exploratory review of the relationship between family-friendly policies and the built environment.

### Why it matters

- At a personal level, people experience more or less difficulty balancing their numerous roles, with clusters of different issues characteristic at different stages of the life cycle. Work-life balance policies are an approach to help people balance multiple roles. Their typical focus, however, is on people as workers. The development of work-life balance policies by government and businesses is conceived within a 'business case', responding to changing demographic patterns, changes in business operations fuelled by technology, 24/7 working, globalisation and off-shoring, and the resultant implications for the labour market and employment. Alongside these business focused interests is also the rationale that a better balance between work and life is more beneficial both personally and at a family level.
- The business case underpins the implementation of work-life balance policies; for the government when promoting them and for employers when considering their introduction and changes in practice. The objectives to retain skilled staff, increase productivity and reduce absenteeism are reasons in favour of developing policies for work-life balance. There are other contributing factors, such as the now more normative formulation of equal opportunities charters, including a focus on employee diversity, linked to companies' image and stance on corporate social responsibility, and promoting the corporate and national interest in reducing the pressure and stress people experience in relation to their work.

### Rising on the agenda, but plus ça change

- Work-life balance policies are gaining more prominence on the national agenda and in workplaces. The government has conducted research to assess the impact of work-life balance policies: *Work-life balance 2000* (Hogarth and DfEE, 2001) and *The second work-life balance study* (Woodland et al., 2003) survey work-life balance policies and provisions from both the employers' and employees' perspectives.
- The data in *Work-life balance 2000* are generated from a representative survey of 2500 workplaces with five or more employees, interviews capturing management and employee views in 250 workplaces and a survey of 7500 employees. *The second work-life balance study* measured how employers' perspectives changed since the 2000 study. It also aimed to establish a baseline for the evaluation of provisions enacted through the Employment Act 2002. Examples are a parent's right to flexible working, and the introduction of paternity and adoption leave and pay.
- To promote implementation, DTI launched a Work-Life Balance Challenge Fund from which companies could seek support to introduce provisions conducive to work-life balance. An evaluation was undertaken by the Tavistock Institute to assess the impact of the Challenge Fund on employers' ability to develop and implement work-life balance policies within the framework of the Fund.
- However implementation levels, take-up rates of policies and awareness levels of policies remain low.

### Focus or breadth?

- A running theme throughout this paper concerns the relationship between a narrower focus on family-friendliness in the workplace, and a broader, more comprehensive focus on the key strands that interplay in the way people's lives are composed and choreographed. Which of these approaches find current expression in policy and practice? Which is more appropriate as a basis of future policy? Which is likely to provide a more productive framework for this project's final objective: exploring ways in which the workplace specifically and built environment contextually could facilitate more family-friendly working in particular, and better work-life balance in general, and may be called upon to do.

## 2.0 WORDS AND CONCERNS: EVOLVING TERMS

### 2.1 Flexibility, family-friendly and work-life balance

- There are numerous concerns and words that impinge on the canvas of 'family friendly', the term that underlines our brief. A web search under each of these terms demonstrates the wide extent of literature, campaigning and action associated with them all. The key terms are all intrinsically linked. Their definitions, cited below are drawn from social science literature and in particular from social policy. We review them in the sequence of their apparent impact on policy. The discussion reveals the links.

#### 2.1.1 Flexibility / flexible working

- Many changes to employment in the 1980s and early 1990s can be classified under the term 'flexibility'. 'Flexibility' became a pre-occupation of management in the 1980s (Hewitt, 1993).
- Research during the late 1980s and early 1990s presents key reasons why flexibility was introduced. McRae (McRae, 1989) suggests that flexibility became more prominent as some jobs were no longer full-time, as a result of new technology and economic changes. Flexibility could also keep production levels constant and regulate work flow, help with absences and reduce staff turnover; improve motivation and the morale of staff, improve rates of productivity and reduce overheads and the need for overtime by compressing hours. Unions were also arguing for a shorter working week (Horrell et al., 1991), requiring a reorganisation of working time and practices.
- Whether job flexibility is advantageous depends on whose perspective is adopted. In application, flexibility can be appropriated to suit the needs of the employer or the employee. Some people may want to work flexibly to spend more time with their families. The ideal situation is a balance of interests and benefits for both employers and employees. However, flexibility can also prioritise the needs of the employer / business, and it may be associated with vulnerability, especially for some employees, such as those on low pay or older workers. Conversely, there is concern that flexibility may disadvantage the employer, either through negative impacts of discontinuous staff presence, or by alienating staff who may feel that they must carry the burden for their colleagues who enjoy the benefits of flexible working.
- The introduction of flexible working has had differential gender impacts. Many changes introduced through 'flexible working' have impacted on men's employment. For example, shift work and overtime, traditionally considered male patterns of employment, are potentially under threat from the introduction of flexible working (Houston and Waumsley, 2003). The main change for women is that there are more employment opportunities. Much of this is low paid and part-time (Horrell et al., 1991).

#### 2.1.2 Family-friendly

- Family-friendly practices have been introduced for reasons similar to those presented for flexible working. In a study titled *Getting the right work-life balance*, employers identified the need to retain skilled staff – and especially women with young children – as well as the need to meet operational requirements as important factors. Organisations reported the perceived need to be seen as 'good employers' as another motivation (Coussey and Chartered Institute of Personnel and Development, 2000).

- Family-friendly policies can be an important way of projecting the image of a good employer, and form part of the broader agenda of corporate social responsibility (CSR). This is evidenced in government literature advancing the business case for encouraging CSR, stating that employees attach value to companies who are committed to the CSR agenda – being good corporate citizens – which includes a firm commitment to valuing diversity of employees and having progressive employment values that include flexible work practices (Great Britain, Department of Trade and Industry, 2004).
- A term like ‘family-friendly’ begs many questions. What is a ‘family’? With demographic changes including sustained moves away from marriage-based nuclear families, there are many different family structures. Are family-friendly policies relevant for all of these family types? Do they discriminate against ‘non-families’? Or is a ‘non-family’ another type of family? What is ‘friendly’? Does this mean being responsive and / or supportive? Who are the beneficiaries of ‘friendliness’? Is it mothers and / or fathers – of pre-school children and / or older children? Is it their children? Is it carers of older people or other dependants? Is it their dependants? Is it employers? Is family-friendly provision limited to work scheduling, or does it also encompass services benefits and / or cash? And does family-friendliness impact negatively on people who are not its intended targets?
- Hitherto, family-friendly policies have largely been used to encourage and facilitate mothers of young children to be economically active. The government is trying to broaden these policies by using the term work-life balance throughout its literature to reference benefits for everyone. The discernible changes in the language used are important indices of a shift (Coussey and Chartered Institute of Personnel and Development, 2000).
- Family-friendly policies have indeed been criticised as overlooking a diverse range of roles and family structures “focusing on parents of young children and occasionally, eldercare responsibilities” (Lewis, 1996, p4). In recent research, ‘flexible working’ has been perceived as more gender neutral and extending to employees without children, compared to the term ‘family-friendly’ that has often been assumed to apply to women with childcare responsibilities (Houston and Waumsley, 2003).

### *2.1.3 Work-life balance*

- The term work-life balance is replacing family-friendly in the discourse of accommodating people’s life strands. Work-life balance is a more fluid concept encompassing more than the economic and social context in which employers and employees interact (Hogarth and DfEE, 2001).
- This does not preclude questions about both the relationship between work and life and the centrality and prioritisation of either dimension to employer and worker.
- However policies conceived in a work-life framework can overcome the definitional difficulties surrounding eligibility and application that arise from the use of ‘family friendly’. They are therefore more easily related to all employees, not just parents, and are likely to gain in importance because of the trends to more flexible retirement and the increasing proportion of older people in the population (Coussey and Chartered Institute of Personnel and Development, 2000).

- The Department of Trade and Industry's web-site provides the following description for work-life balance:

*"Work-life balance is about adjusting working patterns. Regardless of age, race or gender, everyone can find a rhythm to help them combine work with their other responsibilities or aspirations.*

*Increasingly, employers are developing a wide range of work-life balance options, covering flexible working arrangements and flexible benefit packages. Here are just a few: flexi-time, staggered hours, time off in lieu, compressed working hours, shift swapping, self-rostering, annualised hours, job-sharing, term-time working, working from home, tele-working, breaks from work, flexible and cafeteria benefits" (DTI, 2004a).*

- Research for the Joseph Rowntree Foundation (Houston and Waumsley, 2003) identifies the following reasons why work-life balance policies are believed to offer success. This is because they are seen as:
  - Offering financial incentives for employers to retain trained and skilled employees
  - Reducing absence and recruitment costs for the employer
  - Reducing stress for the employee in balancing 'work' and 'life'
  - Offering flexibility and including people who may do unpaid care work.

## **2.2 Refined concepts, alternative terms**

### *2.2.1 Work-life integration*

- 'Work-personal life integration' (Rapoport, et al, 2002, Lewis et al., 2003) denotes a still more holistic and fluid approach, extending the remit of work-life balance policies to the connections between different parts of life, and including more than work and family. It aims to move beyond the current tendency to prioritise work, and to re-evaluate the traditional (although changed) assumptions about gender, paid and unpaid work. It links work and life to "other social problems facing individuals, families, workplaces and communities" (Lewis et al., 2003).
- The focus on integration also allows scope for people's choices to be linked to their own expectations and values, rather than conforming to the presumption that some notional 'balance' between life strands is universally sought (Rapoport et al, 1977, Dower et al, 1981, Rapoport et al, 2002).

### *2.2.2 Work-life reconciliation*

- The EU adopts the language of 'reconciliation of work and family life'. It "implies an attempt to harmonize or bring together different activities or interests so that they can be conducted with as little friction, stress and disadvantage as possible" (Moss, 1996, p23). This term too allows for elective prioritisation by individuals, which may include the notion of balance, without an inherent implication that balance in and of itself or any particular balance is the universal goal.



## 2.3 Reflecting demographic imperatives

### 2.3.1 *Elder care focus*

- Any conceptual approach to work-life integration is relevant to the variety of role commitments that may impinge on traditional work patterns. Increasing responsibility for elder care is on the list of such commitments. It will also be growing. Over three in five people in the UK are estimated to become carers at sometime during their lives (Carers UK, 2004). Currently, approximately six million unpaid carers in the UK provide care for members of their family, partners or friends. This is valued at £57 billion per year. It has major implications for people in paid employment and their employers. Many people in paid employment have to care for dependents and may require changes to their work schedules to meet this requirement, with employers having to respond to these changes. As the population ages, it is expected that the number of people requiring care will increase. The age of people providing care is also likely to increase, and increasing proportion of these carers may themselves be economically active.

### 2.3.2 *Elder work focus*

- There are multiple reasons to consider the prospect of people working longer as they age. Older employees may want to work – full-time or part-time, or may need to work for income and to secure a pension. Intellectual and social engagement are other pulls, particularly as people grow older in better health and with the prospect of longer lives ahead. The wish to ‘stay in touch’ with social currents and to share the ‘wisdom of experience’ are other drivers. Employers can benefit by retaining knowledge and skills of experienced employees, as well as by reducing recruitment costs. The state can also benefit from prolonged labour market participation and through reduced welfare and pension requirements. The welfare benefit may have added significance, given the relatively long-standing evidence that that people ‘do better’ when they are in employment (Moser et al, 1984).
- The prospect of older workers highlights the benefits of considering work-life balance policies from multiple perspectives. Some common initiatives to enhance employment opportunities for older workers include temporary contracts, part-time jobs, freelance and self-employment (Platman, 2004).
- Although there are many potential benefits, a recent study of freelance professionals (aged 50+) – many of whom are ‘portfolio’ workers, included findings on obstacles they faced. Respondents identified the lack of holiday / sick pay, the fear of losing contracts because of increased competition from other consultants and concerns about job security (Platman, 2004).

## 2.4 Reflecting new work modes

### 2.4.1 Remote working

#### Home-working

- Working from home, on either an *ad hoc* basis or more permanently, also relates to work-life balance. Definitions of home-working vary from broad definitions which cover people who work mainly at home, through people who use home as a base for itinerant working and people who sometimes work from home, to more specific definitions such as “any paid work that is carried out primarily from home (at least 20 hours per week)” (Crosbie and Moore, 2004, p224).
- Whilst home-working can promote effective work-life integration, it has implicit demands and associated issues:
  - Creating a workspace at home has practical requirements in terms of finance, health and safety. For example, areas of the home which are used for paid work may be subject to different rates of insurance, business rates rather than council tax, and capital gains tax if the property is sold. However, the arrangement may provide some tax relief for domestic bills that cover the workspace (Business Link, 2004b). Undertaking a risk assessment to assess potential hazards of a workspace is a health and safety requirement. Technical support such as computers and log-in facilities also need attention in respect of both employers’ IT security and employees’ ease of connectivity.
  - There are social and organisational challenges, for example, sustaining employees’ affinity and loyalty to their organisation, maintaining sufficient interaction with colleagues and preventing loneliness if they work from home regularly.
  - The DTI’s baseline survey of work-life balance found that a fifth of workers work at home, regularly or occasionally. These were generally managerial and professional employees who mostly worked from home for work-related reasons (Hogarth and DfEE, 2001).
  - A study into home-working (Crosbie and Moore, 2004) identified different experiences associated with home-working, and some gender differences in people’s experience of working at home. On ‘personal time and space’, men had fewer personal conflicts working from home than women, as they generally defined themselves as wage earners. Professional women compared to women in other occupational categories tended to experience most tension in defining their roles equally as employed workers and home-workers. On ‘care time and space’, the study concluded that most home-workers benefited from the flexibility to balance their time. On ‘work time and space’, it found that many home-workers highlight the importance of a dedicated work area at home.

### Tele-working

- Tele-working is “ A catch all term describing any way of working at a distance using a combination of computers and telecommunications. It is often associated with home-based working, but includes site-to-site electronic working, mobile working, etc.” (www.flexibility.co.uk). It may be used with particular reference of people who undertake paid or unpaid work through use of a telephone and computer in their own home (Hotopp, 2002)
  
- A European project evaluating the economic, environmental and social sustainability of tele-working across Europe, using case studies, identified tele-working as a way that “people can more easily optimise their work and non-work requirements.” (James, 2004, p31) The examples cited in the report illustrate the positive impact tele-working can have on work-life balance, in enabling:
  - o parents to spend more time with their children
  - o working partners the ability to maximise their schedules
  - o people to “seize opportunities, such as taking time off on a sunny day”.
  
- The report emphasised the positive aspects of tele-working, but also acknowledged that there are associated negative implications, for example:
  - o poorly designed tele-work schemes can have negative financial implications - for the employer in establishing systems, and / or for the employee in the additional equipment that they may require at home
  
  - o people without sufficient working space at home felt that they were discriminated against
  
  - o in some cases, and especially in the UK, working hours had increased, which was reported to detract from a more positive ‘quality of life’.
  
- Remote working can promote integration between life strands, roles and commitments, and can reduce energy consumption and the time and strain involved in commuting. However, the opposite can also apply, that people miss out of the benefits of structure, stimulus and sociability involved in ‘going to work’, benefits that can be life-enhancing and stress-reducing for the individual and a facilitating condition of creative interaction between colleagues and collaborators. Productive questions are how to optimise these strains and benefits in the short term, and to predict their interplay over coming decades so that employers and employees can learn how to optimise for the future.

## **2.5 Current UK policy focus: work-life balance**

- Against this background, the current UK policy focus is on work-life balance both for government and business.
  
- The DTI outlines the contributing factors leading to development of work-life balance policies throughout their communications such as *Work-life balance and flexible working – the business case*. A shift in emphasis is evident in the articulation of policy aims, away from ‘flexibility’ and ‘family-friendly’ to a more inclusive ‘work-life balance’ approach. This reflects a belief that business, the economy, parents, carers and the workforce generally benefit from policies to promote work-life balance (Hogarth and DfEE, 2001).

- However, the arguments used to encourage companies of all sizes and in all sectors to adopt such policies are productivity based. In outlining their respective cases, both the DTI and the industry network, Employers For Work-life Balance, present similar business benefits to be derived from adopting work-life balance policies, both referencing supporting evidence in favour.

*Work-life balance and flexible working - the business case* (DTI, 2004c):

- Motivate your staff
- Save on recruitment costs
- Reduce your staff turnover
- Reduce absenteeism
- Attract and retain a talented workforce
- Improve customer service.

*Business case – the business benefits* (Employers for work-life balance, 2004):

- Increased productivity
- Improved recruitment and retention
- Lower rates of absenteeism
- Reduced overheads
- An improved customer experience
- A more motivated, satisfied and equitable workforce.

- Other arguments for promoting these policies are secondary. They include:
  - The social justice case: to provide equality in opportunities for employees (Miller and Neathey, 2004)
  - The improved quality of life / reduced pressure rationale which suggests that family-friendly policies have the potential to reduce stress and conflict for people undertaking multiple roles (Lewis, 1997).
- Whilst such arguments may strengthen the case for adopting policies for work-life balance, to date they have not underpinned them.
- As currently articulated, therefore, work-life balance policies in the UK emphasise:
  - 'Work' rather than 'life'
  - The parental obligations of workers with young children rather than reflecting a broader focus on all employees.

## **2.6 International perspectives**

### *2.6.1 EU: reconciliation of work and family*

- The EU language for work-life balance - 'the reconciliation of employment and family responsibilities', reiterates a focus on family friendliness. There is no consensus on the term 'reconciliation', and in different EU languages it translates with different emphases. There is debate about the intention of 'reconciliation' as an objective, in terms of whether it provides adequate scope for both work and family. For example, 'reconciliation' can be seen as a way to harmonise and merge different aspects of life, reducing stress and tension (Moss, 1996). However, it has also been defined as a market orientated goal that has shifted the focus away from the original aim of gender equality (Stratigaki, 2004).
- The term reconciliation seems consistent with the EU's employment emphasis and the employment targets set by its Employment Strategy discussed in 3.3.2.

### 2.6.2 US: 'family-responsive' policies

- US policies also reflect an accommodation of family within the sphere of work:
  - Socio-political changes in the US in the 1980s and 1990s, such as reaffirming the ideology of individualism, the downsizing of government and the restructuring of employment have influenced the development of 'family responsive policies'. In practice, given the absence of alternative provision, these changes place more responsibility on companies to provide for their employees. Gonyea and Googins argue that in addition to the traditional focus on childcare, these changes urge corporations to focus on a new set of concerns such as job security, income security and the increased stress people experience in balancing their work and family responsibilities, and extend the scope of family-responsive policies that companies should provide (Gonyea and Googins, 1996).
  - 'Family-responsive' policies have been criticised for prioritising 'work' over 'life'. For example, Lambert suggests that the failure of family responsive programmes is that they try to match new economic requirements to old job structures. For example, according to this view, childcare provision is for women to stay at work longer and for as long as they can (Lambert, 1993).

### 2.6.3 Implications for the UK

- Both European and US approaches to work-life balance influence policy development and provision in the UK. In both the US and UK, the family tends to be regarded as part of the private domain and there is a reluctance for policy to intervene in family matters. For example, both have minimal state childcare provision, placing the onus on companies to provide more extensive services for their employees. The European context varies between member states. Provision has been increased in the UK resulting from EU membership, as the UK is bound to the EU's legal framework where directives specify a minimum standard of compliance.

### **3.0 DEMOGRAPHICS AND EMPLOYMENT**

#### **3.1 Inter-related influences at play**

- Patterns of employment can be understood in terms of the relationship between the state, market and family, all of which are impinged by social values – of individuals, corporate organisations, national government, and wider governmental frameworks - for the UK, the EU. These connections explain the context of how choices are shaped and / or constrained, and bear on the extent to which men and women 'choose' their working patterns, whether they are directed by policy, by economic choice or its absence. For example, do more women work out of preference, or is their scope for more full-time work constrained? The same can be asked of the extent to which men engage in full-time work. The relationship between paid and unpaid work is another important dimension of employment patterns and trends. Whilst the traditional 'gender contract' where men are constructed as the primary breadwinners and women as primary carers is eroding, there are still inequalities in the amount of unpaid and paid work that men and women undertake. These factors influence employment decisions and frame their outcome in employment data. Critics of the proposition that preferences help determine women's labour market careers emphasise the effects of gender inequalities on women's work experiences and the constraints on the formation and enactment of their preferences (Warren, 2004). The term 'satisficing' has been suggested as more relevant to the apparent job satisfaction expressed by female part-timers in low-level jobs (Crompton and Harris 1998).
- In parallel with and underlying gender constructs, however, are demographics: who is available to undertake work and to provide for those who can't.

#### **3.2 Demographic trends**

##### *3.2.1 Fertility and parenthood*

- Fertility rates have decreased in the last few decades. In 1964, the peak of the 'baby boom', the fertility rate was 2.95 children per woman. In 2003 the UK fertility rate was 1.71 (ONS, 2004b). The EU fertility rate for 2003 was 1.5 (Eurostat, 2004).
- Changes have also occurred to the age when women have children. The mean age of women at childbirth has increased in the UK. In 1971, the mean age was 23.7 for first births. In 2003, the mean age of women at childbirth was 26.9 for their first births (ONS, 2004b).
- Births outside of marriage have increased. In the UK, the percentage of births outside marriage in 1970 was 6%; in 2002 it was over 30%. This is linked with the increase in cohabitation (Eurostat, 2004).
- Approximately one in five woman reaches the end of her fertile life childless; the comparator in the 1940s was one in ten (ONS, 2004b). Research has shown that voluntary childlessness in Britain at age 42 is 7-8%, and 12% at age 30 (Hakim, 2003).

##### *3.2.2 Marriage and divorce*

- Marriage rates have decreased, whilst the age of marrying for both men and women has increased. In 1991, the marriage rate per 1000 people in the UK was 6.05; in 2000 it

was 5.12. In 1980 the average age for men to marry was 26 and 23 for women. In 2002, men were on average over 30 and women were 28 at their first marriage (Eurostat, 2004).

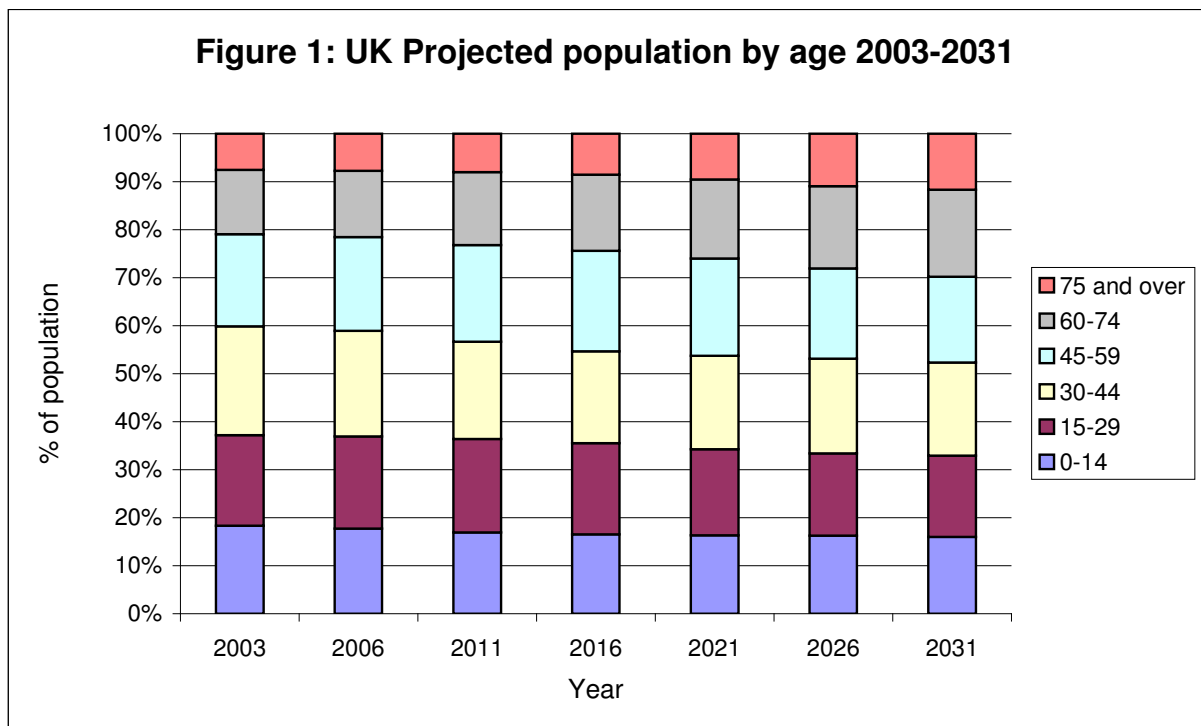
- The rate of divorce appears to have stabilised in the last few years, following an increase over the preceding decades. In 2003 the number of divorces was 166,700. This was lower than the peak divorce rate: 180,000 in 1993. Most divorces in 2003 (69%) were couples for both of whom this was their first marriage (ONS, 2004a).

### 3.2.3 Household formation

- There have also been changes to household formation, with trends to more and smaller households. The number of households in the UK has increased significantly: from 16.3 million in 1961 to 23.9 million in 2000. In this period, the percentage of one person households has been the most significant change: from 14% of all households in 1961 to 29% in 2000. The average size of a household has decreased from 3.1 to 2.4 people during the same period (ONS, 2001).

### 3.2.4 Ageing population

- Figure 1 shows the projected population profile by age 2003-2031. This shows the age of the population increasing (Shaw, 2004):
  - The median age of 38.4 in 2003 is expected to rise to 43.3 by 2031
  - The percentage of people aged 60 and above in 2003 was 21%. This is expected to increase to 30% by 2031.
- These trends are predicted to continue with increased life expectancy, which has risen to 81 years for women and 76 years for men born in the UK (ONS, 2004d).

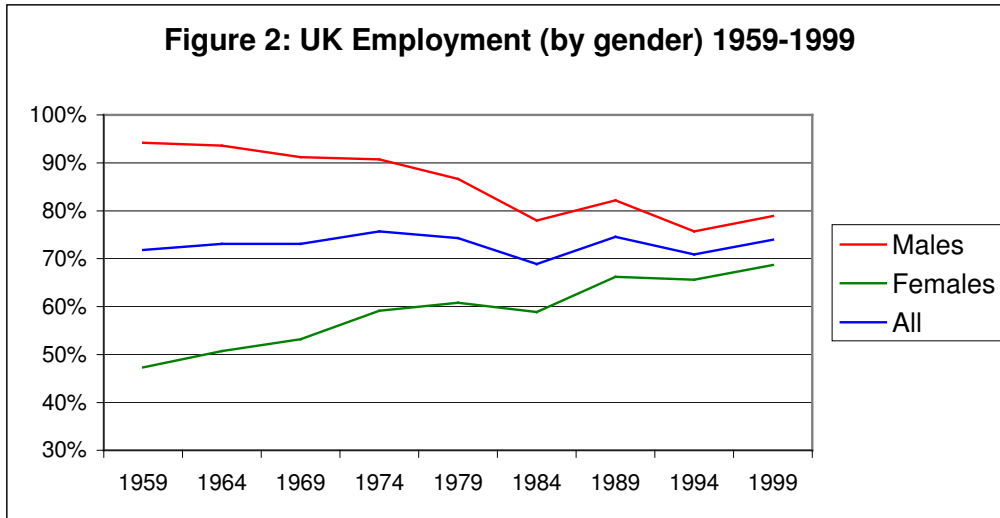


Source: (Shaw, 2004)

### 3.3 Employment trends

#### 3.3.1 Employment and unemployment

- Over the last few decades overall levels of employment have remained steady. The number of women in the labour market has significantly increased; levels of male employment have decreased. Figure 2 illustrates these changes.



Source: (ONS)

- Employment forecasts by the Office for National Statistics (ONS) predict further rises in employment levels. By 2011, the ONS anticipate that there will be 14.1 million females in the labour market, including 9.8 million aged 25-54. By 2011, the number of men in the labour market is expected to be 16.5 million (ONS).
- The overall UK unemployment rate in October 2004 was 4.7% (ONS, 2004c). EU unemployment rates in 2003 were 8.2% for men and 9.9% for women (Eurostat, 2004).

#### 3.3.2 EU strategy

- The European Employment Strategy sets out an agenda with employment targets for the enlarged EU. Some of the key employment targets agreed at the Lisbon Council (March 2000), Stockholm (March 2001), Goteborg (June 2001) and Barcelona (March 2002) meetings include (HM Treasury, 2004a):
  - Overall employment rate of 67% in 2005 and 70% by 2010
  - Female employment rate of 57% in 2005 and 60% by 2010
  - Employment rate for workers aged 55-64 of 50% by 2010.
- Current indicators suggest that it is unlikely that the 2005 targets will be achieved (HM Treasury, 2004a). Further job creation and in particular bringing under-represented sectors of the population into employment are essential if these targets are to be achieved by 2010. Currently only Denmark, the Netherlands, Sweden and the UK have an overall employment rate of over 70%. Austria, Cyprus, Finland and Portugal appear to be on target for 2010, already having achieved the interim target of 67% (HM Treasury, 2004a). Table 3 collates data from the EU (before enlargement), showing the gap between the employment targets and actual levels of employment.
- Enlargement of the EU presents a greater challenge towards these goals. The overall employment rate in the enlarged EU of 55.9% (HM Treasury, 2004a) highlights the need for significant job creation.



<b>Table 3: Progress towards the Lisbon and Stockholm targets from EU 15</b>					
<i>Total employment rate</i>		<i>Female employment rate</i>		<i>Older workers employment rate</i>	
2002 (%)	% below 2010 target of 70%	2002 (%)	% below 2010 target of more than 60%	2002 (%)	% below 2010 target of 50%
64.3%	5.7%	55.7%	4.4%	40.1%	9.9%
Data source: Eurostat, QLFD. Table extracted from:(DG Employment and Social Affairs, 2003)					

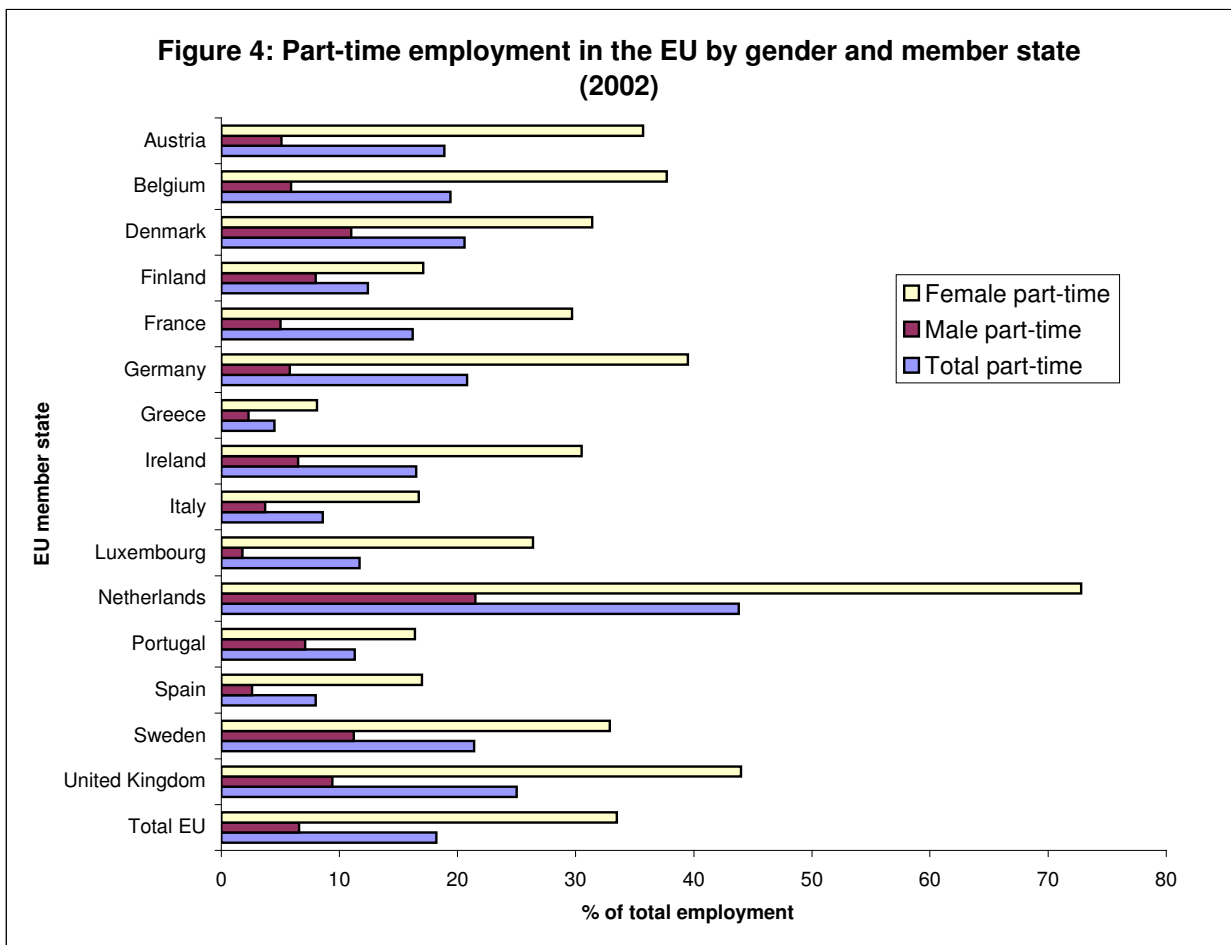
### 3.3.3 How much time individuals work

- The capacity of the employment market relates to the division of labour. How many people are in jobs can be varied according to the 'size' of jobs available. Could more part-time work and shorter house extend access by spreading the work around?

#### Part-time work

- The European Framework Agreement (1997) on part-time work defines a part-time worker as "an employee whose normal hours of work, calculated on a weekly basis or on average over a period of employment of up to one year, are less than the normal hours of work of a comparable full-time worker" (Official Journal L 014, 2000).
- Much of the increase in women's labour market participation has been in part-time work. The UK has seen an increase in part-time working, particularly by mothers with young children. Characteristics of part-time work in the UK, particularly for women, include low pay and few employee benefits (Hogg et al., 1992, Perrons and Shaw, 1995, O'Connor et al., 1999).
- Part-time work also has advantages. When asked about the reasons for working part-time, the most common reasons for women were 'to spend more time with family' (49%) and the 'need to meet domestic commitments' (36%). For men, the most common reasons were 'already financially secure' (15%) and 'to spend more time with family' (14%) (Hogarth and DfEE, 2001, p24).
- Figure 4 compares rates of part-time work for men and women throughout the EU. Part-time employment is consistently higher for women. Men's part-time employment represents a lower percentage of total employment than women's in all EU member states.

- This table also compares rates of part-time work by member state. At 44%, the Netherlands has a significantly higher part-time work rate than other member states. The next highest is the UK at 25%. The only other countries with levels of part-time work above 20% are Denmark, Germany and Sweden. Italy, Spain and Greece have low overall levels of part-time work, at under 10%.
- When analysing by gender, the highest rates of female part-time employment are in the Netherlands (73%) and UK (44%), with the next cluster of countries including Germany, Belgium and Austria (all between 35%-40%).
- At 22%, the highest rate of male part-time employment is in the Netherlands. The next highest rates are in Denmark, Finland, Sweden and the UK, with rates between 8% -12% (Corral and Isusi, 2004).



Source: Eurostat Labour Force Survey  
 Extracted from: (Corral and Isusi, 2004)

### Long hours culture

- Working long hours, generally over 60 hours a week, has characterised the UK as having a 'long hours culture'. This is a cause of considerable debate. In the UK more than 20% of full-time workers work longer than 48 hours a week. The UK is a notable exception in the EU, as the percentage is less than 5% for most EU member states (before enlargement) (DG Employment and Social Affairs, 2003). How do long work hours relate to productivity? How do they relate to work life integration and family-friendliness?
- A key UK employment feature is that men with partners and dependent/s are more likely to work long hours, with their partners working part-time (Houston and Waumsley, 2003, Hogarth and DfEE, 2001). There are many reasons why people work long hours. These may include financial need, enjoyment and demonstrating commitment and loyalty to an organisation. Working long hours can have positive effects, including satisfaction, self-worth and income, as well as negatives, including stress and family conflict.
- 'Work-to-family conflict' is a measure used to assess the extent to which work interferes in family life (Thompson et al., 1999), and as a method to demonstrate both the effects of stress on employees and the resulting impact on the employer.
- In the government's baseline survey *Work-life balance 2000* (Hogarth and DfEE, 2001, employees who worked additional hours reported working on average nine hours extra per week
  - The average weekly overtime for full-time workers was 9.7 hours; the average for part-time workers was 6.7 hours
  - 39% of those who worked more than their standard or fixed hours did not receive any additional pay / financial benefit for this
  - 48% reported that additional hours were paid
  - 18% reported being given time off in lieu
  - Manual workers were the most likely group to be paid for working additional hours
  - Senior managers were least likely to be paid for extra time.
- EU research in 2001 compared the gap between hours worked and negotiated collective agreements:
  - For full-time employees, the EU average working week was 40 hours
  - The average working hours in negotiated collective agreements was 38.5 hours
  - In Denmark, France and Germany the gap between hours worked and agreed hours exceeded the agreed hours by two hours or more
  - In the UK this gap was six hours (DG Employment and Social Affairs, 2003).

- The UK's decision to maintain the 'opt out' clause (although altered) of the European Working Time Directive (EWTD) has been controversial, with conflicting concerns articulated by key lobby groups such as the CBI and TUC. The CBI suggests that further regulating the 'opt-out' detracts from individuals' choice of the hours that they work (CBI, 2004). The TUC argues that maintaining the 'opt-out' is a failure on the part of the EU to understand the damage that the UK's long hours culture causes the workforce and the economy (TUC, 2004).
- In response to this tension, the DTI, TUC and CBI under the administration of the EOC have joined together in a long hours partnership project, aimed at deeper understanding of how working time is organised and managed, in order to identify good practice and disseminate it to a wider audience (DTI, 2004b). The EOC is co-ordinating masterclasses for the partnership between June 2004 and May 2005. A report will be written to disseminate to a wider audience at the completion of these masterclasses, and a closing conference will be held for participants in July 2005 (EOC, 2004).

### *3.3.4 Self-employment*

- In 2003, reported self-employment represented 12% of the working population in the UK; 7.4% of working women were self-employed and 16.1% of men (Employment and Social Affairs, 2004). Between September 2002-2003, the number of self-employed people increased by 282,000 people (Lindsay and Macaulay, 2004).
- Analysis reveals that men accounted for most of the increase in full-time self-employment and women for most of the increase in part-time self-employment. Those aged 35-49 showed the largest move into self-employment, but there were also significant increases for people over 50 (Lindsay and Macaulay, 2004, Macaulay, 2003).
- Some of the rise in self-employment can be explained by changing business needs and the needs of employees to have more flexible working (Coussey and Chartered Institute of Personnel and Development, 2000). These trends may imply that traditional working opportunities are becoming more limited, perceived as restrictive or that other risks and rewards are preferred.

### 3.4 Interaction of demographic and employment trends

#### 3.4.1 Parents, marital status and work

- Tables 5 and 6 present data generated by combining demographic and employment trends. They emphasise the importance of marital and parental status in employment patterns, with both highlighting differences in the working patterns of women and men. Table 5 shows that the rate of employment is lower for married compared to single women, whilst the converse applies to men: the rate for single men in employment is lower than for married men. Single women have higher rates of full-time employment compared to married women, and married women higher rates of part-time employment compared to single women.
- The data in table 6 show the impact of dependent children:
  - Men with dependent children have higher full-time employment rates compared to men without dependent children
  - Rates of part-time work for women with dependent children are high
  - Child's age is associated with the employment patterns of women. For example, married women with children aged between 0-4 have the highest rates of part-time employment.

	Single (thousands)	Percentage of all single employees (%)	Married (inc. separated) (thousands)	Percentage of married employees (inc. sep.) (%)	Married (exc. separated) (thousands)	Percentage of married employees (exc. sep.) (%)
<b>Full-time</b>						
men	4,815	87	6,842	94	6,582	94
women	3,414	67	3,121	48	2,905	48
<b>Part-time</b>						
men	727	13	402	6	387	6
women	1,708	33	3,315	52	3,158	52

Source: (Hurrell, 2003) Spring 2002 briefing from EOC extracted from Labour Force survey 2002

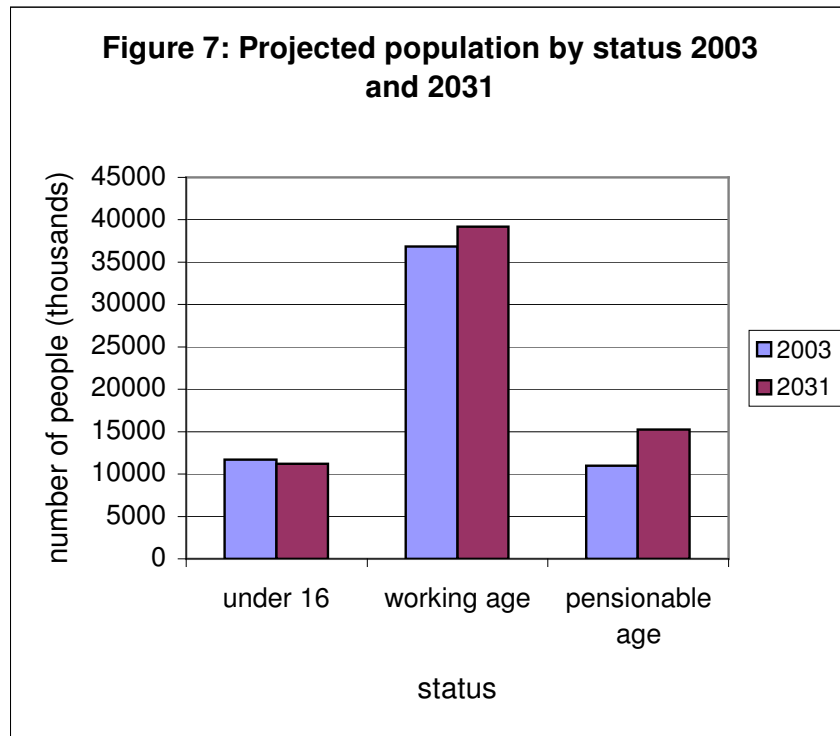
**Table 6: Married employees by age of youngest dependent child, gender and full-time or part-time working in main job**

	Youngest dependent child 0 – 4 (thousand s)	Married employees with child 0 – 4 (%)	Youngest dependent child 5 + (thousand s)	Married employees with child 5 + (%)	No dependent children (thousand s)	Married employees with no children (%)
<b>Full-time</b>						
men	1,467	97	2327	97	3,048	92
women	304	32	955	42	1,862	58
<b>Part-time</b>						
men	51	3	76	3	275	8
women	642	68	1,325	58	1,347	42

Source: (Hurrell, 2003) Spring 2002 briefing from EOC extracted from Labour Force survey 2002

### 3.4.2 The ageing population

- The interaction of employment and demographic patterns is marked in respect of the ageing population, if these impacts are not yet widely recognised in family-friendly policies and practices. By 2006:
  - There will be more 55-64 year olds than 16-24 year olds
  - The 49-59 age bracket will form the largest section in the labour market (Employers Forum on Age, 2004).
- This brings issues such as eldercare, pension provision and changing patterns of employment for older people into sharp focus. For example, in 2010 in the EU – when baby boomers begin to retire, the dependency ratio (i.e. the proportion of those in the population aged 65+ to the proportion aged 16-64) is predicted to increase to about 27% from 15% in 2002 (Eurostat, 2002). Dependency ratios are not a precise indicator of the burden because:
  - They do not account for non-financial contributions (Phillipson, 1998)
  - They imply that everyone aged 15-64 is economically active (Walker, 1990)
  - They imply that retirement will occur and care will be required at a certain age.
- However, dependency ratios are indicative of broad trends. Figure 7 illustrates the distribution of the population in 2003 compared to predicted levels for 2031. It shows that the population will have fewer people aged under 16 in 2031 than in 2003. It also shows that the biggest increase in population will be by people of pensionable age. A greater proportion of us will clearly be dependents.



Source:(Shaw, 2004)

### 3.4.3 Referencing the finer grain

#### Informing policy relevance

- The preceding data reference differences in gender, marital status, age, hours worked and managerial status. The potential impacts of other factors, such as regional, urban or rural influences, and cultural variation across employment sectors, are also relevant to consider. Finer disaggregation of the data may indicate where and how policies could be targeted more effectively.
- For example, female labour market participation varies by ethnic group. A study on ethnic differences in women's demographic, family characteristics and economic activity profiles (Dale et al., 2004) found that at times of family formation, 'Black' women are more likely to remain in full-time employment, whereas 'White' and 'Indian' women tend to work part-time. The findings show 'Pakistani' and 'Bangladeshi' women as having the lowest rates of employment.
- An analysis of income based on government office region illustrated that average earnings for men and women are highest in London and lowest in the North East (ONS, 2003).

### Observing legal requirements

- Monitoring and auditing procedures are key both to understanding how policies impact on different sectors of the workforce so that policies can be improved, and to ensure legal observance. As equality and discrimination legislation have been extended to cover gender, ethnicity, disability, religion and belief, sexual orientation and age - from 2006, the legal obligation to avoid discrimination has increased.

### **3.5 Family-friendly provision: current government response**

- The current UK work-life balance policy focus relates to childcare for parents with young children. This is echoed in government initiatives to reflect policy, with provision that responds to the low availability and high cost of childcare.
- The 2004 pre-budget report, titled *Opportunity for All, the strength to take the long-term decisions for Britain* (HM Treasury, 2004b) reflects the increased importance that the government attaches to family-friendly measures. In his speech (on 2 December 2004), the Chancellor stated that through the implementation of the proposed policies, Britain will become “a welfare state that is truly family friendly for the first time” (Brown, 2004).
- Measures proposed to fulfil that aim include:
  - A ten-year childcare strategy which will extend free nursery education for all 3 and 4 year olds to 15 hours a week in 2007, with the aim towards 20 hours for 38 weeks (per year), to create more affordable pre and after school care, and to offer employers £50 a week extra for employees’ childcare requirements free of tax or national insurance
  - To extend paid maternity leave initially to 9 months, with a vision towards 12 months. Within that framework, making some leave transferable to the father was suggested for consideration
  - To extend the right to flexible working to parents with older children
  - Overall, to create an additional 1 million new childcare places by 2010, with an overall commitment of £600 million more by 2007-8 to children and childcare.
- The pre-budget report placed these policies within a framework of building “a strong economy and a fair society, where there is opportunity and security for all” (HM Treasury, 2004b). It consolidates a connection between family-friendly policies and a competitive economy. There is a strong focus on ways to encourage employment in sectors of the community where participation is lower than average, for example: through bonuses to lone parents in employment, expanding the New Deal for Disabled People, and acknowledging the need to address lower employment levels in ethnic minority communities through encouraging self-employment and expanding small businesses (HM Treasury, 2004b). The report framework also promotes the link between family-friendly policies and social equality, a fusion we discuss more focally in Section 5.



## 4.0 FROM WORDS TO ACTION: FAMILY-FRIENDLY POLICIES ON THE GROUND

### 4.1 The range of provision

- As described in Section 2, family-friendly provision falls within the wider policy context of work-life balance. The DTI (DTI, 2004c) categorises provision according to the following typology:
  - Working patterns that focus on when staff work
  - Working patterns that focus on where staff work
  - Working patterns that “give staff a complete break”.
- They include (DTI, 2004c):
  - When staff work  
Job sharing, term-time working, time off in lieu, flexi-time, compressed working hours, annualised hours, shift working, shift swapping, self-rostering, staggered hours, phased or flexible retirement
  - Where staff work  
Home working, tele-working
  - Giving staff a break  
Maternity leave, paternity leave, adoption leave, parental leave, sabbatical or career breaks, study leave.
- The additional provisions that employer organisations offer on the following lines should be added to the repertoire: services, amenities, childcare assistance (nursery, vouchers, subsidies, advice), training and support for career development, eldercare assistance, access to leisure facilities and counselling services.

### 4.2 Research on implementation

- Research into provision for work-life balance is undertaken by government, policy institutes, academics, the media and employers. Notwithstanding the evolution of terminology from flexible working through family-friendly to work-life balance outlined in Section 2, many research studies use these terms interchangeably.

#### 4.2.1 How widespread?

- The government’s second survey of work-life balance policies, *The second work-life balance study*, showed that part-time work was the most common work-life balance provision offered by employers. 74% of organisations offered part-time work opportunities. Overall 81% of employers provided at least one of: part-time working, job sharing, flexitime, annualised hours, term-time working, compressed working weeks and reduced working hours. 44% of employers offered two of these options; only 9% offered three or more (Woodland et al., 2003).
- Organisations with a dedicated HR staff / department are more likely to have formal arrangements for work-life balance. Informal policies may exist in small organisations, but they are difficult to research and evaluate.

- Employees' awareness levels of law and policies indicate different results in companies that do and do not have an HR department / personnel. *The second work-life balance study* shows that staff awareness of relevant changes in legislation such as the right to request flexible working and parental leave is higher in workplaces with dedicated human resources / personnel. 79% of respondents who worked in organisations with an HR department /staff were aware of the changes in the legislation, compared to 21% of respondents who worked in organisations with no HR personnel (Woodland et al., 2003).
- There is also a greater awareness of work-life policies and greater take-up of provision in the public sector (Hogarth and DfEE, 2001).
- Awareness of work-life balance policies based on region also varies. Recent research has shown employees in Wales, London and the North West as having the highest awareness levels of new employment rights, and London as having the highest percentage of requests to work flexibly (16%) whilst the East of England has the lowest (10%) (Palmer, 2004).
- The Daycare Trust suggests that childcare provision is inadequate in that only one in ten employers provide some assistance for staff with childcare responsibilities. Nursery places are offered in 5% of workplaces and 5% provide help with the cost of childcare (Daycare Trust, 2004). This is consistent with government research. Table 8, from *Work-life balance 2000*, shows the provision of facilities, mostly related to childcare, by size of workplace. Generally, as the size of the organisation increases, the provision of support widens (Hogarth and DfEE, 2001). *The second work-life balance study* showed that childcare provision was provided by 8% of employers and was more likely to be found in larger workplaces (Woodland et al., 2003).

<b>Table 8: Provision of facilities by size of workplace</b>					
(Percentages with facilities. Some organisations provide more than one of these facilities.)					
	workplace size				Total
	5-24	25-99	100-499	500+	
crèche	5.8	6.7	6.9	15.4	8.9
subsidised nursery places outside of work	3.4	3.3	4.6	6.6	4.6
other types of financial help with childcare needs	3.8	3.3	4.1	5.9	4.3
information about local childcare	14.0	14.4	15.3	19.6	16.0
information about other care	14.3	14.6	16.6	18.1	16.1
help with childcare arrangements during school holidays	7.4	5.6	6.0	8.9	6.9
financial help with other care needs	11.2	11.0	13.2	13.7	12.4
workplace counselling or stress managements advice	35.8	42.8	53.3	57.8	48.7

Source: WLB 2000: Employee Survey.  
From: (Hogarth and DfEE, 2001, p191)

- Correlating with the discussion on part-time work outlined in *Section 3.3.3*, women utilise provisions for flexible work at a higher rate than men. Take-up rates are highest in the public sector. Except for flexitime, more female than male employees work under flexible arrangements. The most common of these arrangements is to work part-time.
- Table 9 illustrates the take-up rates of flexible working arrangements by gender. The results show that part-time working, term-time working and shift work have a marked gender difference in take-up rates.

	% of male	% of female
<b>Working arrangement</b>		
annualised hours	2	2
compressed week	6	7
job-share	3	6
term-time	8	16
flexitime	23	25
part-time (and reduced hours)	8	44
shift work	24	18

- Table 10 illustrates the take-up rates of flexible work arrangements by occupational group. It shows that part-time working is not as common in management as it is in other occupational groups. It further shows that non-manual workers (for example clerical, secretarial, sales assistants, waiters, bar staff) work the most flexibly compared to the other occupational groups.

	part-time workers(%)	senior managers (%)	junior managers (%)	non-manual (%)	manual (%)	none of these (%)	don't know (%)
<b>working arrangement</b>							
annualised hours	45	40	31	56	35	0.3	9
compressed week	23	28	41	22	27	0.2	14
reduced hours / job share/term time	44	17	27	52	28	0.7	5
flexitime	53	45	47	68	21	0.3	0.9
part-time		11	13	57	34	0.8	0.3
any	11	14	15	46	27	0.7	2

Source: WLB 2000 Employer survey  
 From: (Hogarth and DfEE, 2001, p97)

- The government's baseline survey on work-life balance reported that 20% of employees worked at home either occasionally or more regularly. The most common reasons for working from home were 'the demands of the job' and 'to get more work done / it is more efficient' (Hogarth and DfEE, 2001).

#### 4.2.2 *Perceived benefits*

- The government's second work-life balance survey reports that policies and provisions for work-life balance are welcomed by employers.
- The 'overriding benefit' reported by employers is that it creates a 'happier workplace' (Woodland et al., 2003).

#### 4.2.3 *Barriers to implementation*

- The main disadvantage employers reported is 'shortages of staff' (**Hogarth and DfEE, 2001**) (**Woodland et al., 2003**). The data does not reflect whether the shortages affect staff availability at given times or labour market scarcity.
- Employers report that disruption and cost are the most common difficulties encountered when implementing work-life balance policies. Other difficulties in implementation were reported as: co-ordination / cover, difficulties in persuading managers, additional training or administration of training; maintaining client / customer continuity, cost of provision of benefit / facility / equipment, keeping in touch (during career breaks), low take-up, recruitment of job sharers is difficult, isolation when working from home (Coussey and Chartered Institute of Personnel and Development, 2000, Camp, 2004, Woodland et al., 2003, Nelson, 2004, Hogarth and DfEE, 2001).

#### 4.2.4 *Barriers to take-up*

##### Grade

- Eligibility for work-life balance provisions is restricted to certain grades. In one study 42% considered work-life balance policies to be unfair on some employees (Woodland et al., 2003). This finding may be related to work-life balance policies being more available to employees at certain grades or more available to staff who have young children.
- Work-life balance policies are not always available to staff at lower grades nor those in senior management positions. In addition, middle management may be reluctant to work flexibly as this may be perceived to impede career progression.

##### Gender

- There is a general perception that women can more easily avail themselves of work-life balance provisions as currently conceived (Hogarth and DfEE, 2001):
  - 81% of women and 78% of men believed their employer would allow them time off from work to look after children
  - 48% of women and 26% of men believed that their employer would allow them to change their hours to part-time.
- It is difficult to determine whether this reflects employers' stance.

#### Perceived gap between 'talk' and 'walk'

- Although the availability of work-family policies is often used in the recruitment and retention of employees, they often are set against organisational norms such as overtime and long hours, and employees may conclude that taking advantage of these provisions will be detrimental to their careers (Blair-Loy and Wharton, 2002).
- The government's second work-life balance study reported 74% of employers consider that promotion was as likely regardless of whether staff worked flexibly or not (Woodland et al., 2003). However, there are also findings that suggest the contrary, including:
  - A widespread feeling that part-time work would lead to demotion or lack of promotion (Camp, 2004)
  - Almost half the sample (46%) in the Joseph Rowntree Foundation's study of attitudes to flexible working and family life feeling that people had to put work before family to progress within a company (Houston and Waumsley, 2003).
- These findings highlight a tension between the openness of expressed policies and perceived barriers to their take-up. Its resolution will hinge on persuasive evaluation evidence that people who operate in family responsive ways are not penalised in career advancement, and credible role models being visible at all levels in organisations.

#### Accounting for low take-up

- Although take-up rates of flexible working policies are higher among female workers, take-up is low in general. In one study, the reasons provided for low take-up are (Coussey and Chartered Institute of Personnel and Development, 2000):
  - Some provisions may not be relevant to all employees
  - Other solutions may have been implemented to meet employee's needs
  - Some may not be in a financial position to reduce working hours or take career breaks
  - There may be a stigma associated with take-up of some of the policies
  - Organisational culture may not encourage take-up.
- Most organisations (64%) had no monitoring mechanisms nor procedures to assess the effectiveness of practices for work-life balance (Hogarth and DfEE, 2001).

### **4.3 Organisational culture and values**

#### *4.3.1 Credible culture evidenced in action*

- Organisational culture is an important factor influencing policies and provision to facilitate work life integration. An organisation's structure, the people it employs, the processes it develops and the culture it promotes are all influential in developing and implementing effective provision (Brown, 1995).
- The organisational culture can be facilitative. One study defines work-family culture as "the shared assumptions, beliefs, and values regarding the extent to which an organization supports and values the integration of employees' work and family lives" (Thompson et al., 1999 p394).

- The key dimensions of work-family culture are defined as:
  - Managerial support for work-family balance
  - Career consequences associated with utilising work-family benefits
  - Organisational time expectations that may interfere with family responsibilities.
- Employees' perceptions about the work-family culture within an organisation can influence attitudes about the organisation more broadly, as well as their decisions on take-up of company policies. For example, many people associate time worked with commitment and / or value to an organisation, which may lead to reluctance to utilise work-life balance policies (Thompson et al., 1999).
- One of the barriers associated with a dominant organisational culture in relation to take-up of provision is staff's 'need to feel a sense of entitlement' – that they have the right to request family-friendly policies. If these are considered to be a perk rather than a right, staff may be inhibited in using them, perpetuating traditional work patterns (Lewis, 1997).
- There is a contradiction at play in this regard, linked to breadth of work-life definition. Lewis argues that traditional gender roles prevail in the workplace and that women generally have a lower sense of entitlement compared to men. However, in respect of family-friendly policies, women have a stronger sense of entitlement because they conform to a 'woman's role' (Lewis, 1997). Is there evidence that gender identities in respect of work and family are changing in younger cohorts, such that their aspirations and demands might re-shape the implicit corporate codes regarding family-friendly provision? (Travis, 2004)

#### 4.3.2 *The predicament of managers*

- There is also merit in looking at barriers to implementation in finer grain, as well as barriers to take-up.
- In the Tavistock Institute's evaluation of the work-life balance Challenge Fund for the DTI, 51% of respondents reported that managerial workloads had increased as a result of establishing work-life balance arrangements (Nelson, 2004).
- Other research finds that managerial attitudes are often influential in meeting individual requests or company policy. Managers are commonly concerned that there will be problems in accommodating flexible work requirements. Some of their concerns have research validation, whilst others are associated with a lack of experience, knowledge and creativity (Coussey and Chartered Institute of Personnel and Development, 2000).
- Managers are likely to be sandwiched between the positive aspirations of the organisational leaders above them, and the demands of staff below them. Given managers' responsibility to maintain productivity, focussed support for this tier, and realistic reconciliation with other business goals and expectations as expressed by targets and budgets, is indicated for organisations that seek to promote effective provision for family-friendly operation.

#### 4.3.3 *Consultation and unions*

- The government's baseline survey on work-life balance (Hogarth and DfEE, 2001) showed that consultation with staff seems to be important in:
  - Facilitating the development of relevant policies
  - Increasing awareness of policies within an organisation.
- Consultation is more common in the public sector. As a result of consultation, the policies that are developed are more relevant to staff and there is a greater awareness and 'ownership' of the policies.
- In organisations with a recognised union, a higher rate of consultation was reported, and provision of policies and take-up rates were also higher (Hogarth and DfEE, 2001, Woodland et al., 2003).

## **5.0 FAMILY-FRIENDLY POLICIES: LEGISLATING FOR EQUALITY**

### **5.1 UK policy in a European context**

- The UK has been perceived and described as an ‘awkward partner’ in the EU (Nugent, 1999). The relationship between the EU and its member states is not always predictable in that it is often embedded in national interests (Leibfried and Pierson, 2000). There is a tension between protecting national interests and sovereignty and the advantages in EU membership. The relationship between every Member State and the EU differs.
- The UK has not always adopted EU policy on work-life balance at the same time as other member states. Directives on the treatment of part-time workers and maternity leave have lagged behind and required additional Council Directives for implementation in the UK. Although the form and method of implementation is the choice of the individual state, member states are obligated to implement EU directives and failure to do so could result in legal action.

### **5.2 UK equal opportunities policies**

#### *5.2.1 From productivity to equal opportunity*

- The UK can be nowadays classified as a neo-liberal state, emphasising the principles of freedom and individual rights with market individualism (O'Connor et al., 1999). In relation to gender policy, the UK has traditionally been categorised as a strong male breadwinner / female carer model (Lewis, 1992). Although much of the impetus for equality legislation is from the EU, the legislation is protected and accepted by all major political parties in the UK. Work-life balance policies, and the family-friendly agenda which they encompass, relate to the context of equal opportunities policy as well as to the national productivity agenda. However, measures for worker protection, including limits on working hours, have not gained employer support to the same degree.
- On 30 October, 2003, the government announced its intention to establish a single equalities body – the Commission for Equality and Human Rights (CEHR). This will combine responsibility for the current equality strands – gender, race, disability, sexual orientation, religion and belief and age. The CEHR’s launch date is expected to be late 2006 or early 2007. ( Women and Equality Unit, 2004).
- The EC Employment Directive has been a major driver towards this single equality body. The CEHR will merge the functions of the Equal Opportunities Commission (EOC), the Commission for Race Equality (CRE) and the Disability Rights Commission (DRC) and include the additional areas of discrimination based on sexual orientation, religion and belief and age.
- The predicted benefits of a single equality body include establishing a “strong and authoritative champion of equality and human rights” (Great Britain Department of Trade and Industry. et al., 2004), to tackle discrimination and promote equality and diversity in employment as a mainstream concern. This signifies a shift in approach from productivity to equal opportunities as the policy objective, with a greater emphasis on employment diversity as an end in itself.



### 5.2.2 UK legislative framework for equality

- The following summary of key equality legislation affects the workplace arena:
  - 1970 – Equal Pay Act (EqPA)
  - 1975 – Sex Discrimination Act (SDA)
  - 1976 – Race Relations Act (RRA); 2000 Race Relations Act (RRA) Amendment
  - 1995 – Disability Discrimination Act (DDA); DDA extension 2003 – came into force October 2004
  - 2003 – Employment Equality (sexual orientation) Regulations
  - 2003 – Employment Equality (religion or belief) Regulations
  - 2006 – Forthcoming legislation protecting against age discrimination

### 5.3 Key policy and legislation for family-friendly policies

- In addition to equality legislation – which protects against discrimination (direct and indirect), victimisation, harassment and bullying – are other key policies, campaigns and regulations with a more overt family-friendly focus. Some are protected under equality law, for example, maternity leave which is protected under Sex Discrimination Act, whereas the right to flexible working is part of the Employment Act.

#### 5.3.1 Work life balance campaign (2000)

- On March 9, 2000 the Prime Minister launched the government's work-life balance initiative. The key elements of the campaign are:
  - Establishing 'Employers for Work-Life Balance' which is an alliance of employers committed to 'promoting good practice'. The priority of this network is "to raise awareness of the business benefits of work-life balance policies and to share best practice" (Great Britain. Department for Education and Employment. et al., 2000, p26).
  - The Department for Education and Employment (DfEE) published the discussion paper, *Changing Patterns in a Changing World*, outlining the case for, and benefits of, work-life balance policies. It provides a checklist (Figure 11) drawn up with the 'Employers for Work-Life Balance' for employers to demonstrate their commitment:

**Figure 11: Work-Life Balance: A checklist for employers**

An organisation that is committed to work-life balance:

- Recognises that effective practices to promote work-life balance will benefit the organisation and its employees
- Acknowledges that individuals at all stages of their lives work best when they are able to achieve an appropriate balance between work and all other aspects of their lives
- Highlights the employer's and the employee's joint responsibility to discuss workable solutions and encourages a partnership between individuals and their line managers
- Develops appropriate policies and practical responses that meet the specific needs of the organisation and its employees, having regard to:
  - \* fairness and consistency
  - \* valuing employees for their contribution to the business, not their working pattern
  - \* monitoring and evaluation
- Communicates its commitment to work-life strategies to its employees
- Demonstrates leadership from the top of the organisation and encourages managers to lead by example.

Source: (Great Britain. Dept. for Education and Employment. et al., 2000, p4)

- Launching the Challenge Fund aimed at helping employers to develop interest in work-life balance policies by providing financial assistance and consultancy services. The campaign helps companies to realise bottom-line benefits of providing opportunities for employees to balance work and the rest of their lives:
  - In October 2000, the fund assisted 69 employer bids in its first round
  - In 2001 a further 106 employer bids received funding
  - By mid-2003 a total of £11.3 million had been awarded (Nelson, 2004).
- The retention and recruitment of staff, especially where employers experience skills shortages, was the main concern encouraging employers to approach the fund for assistance
- An evaluation of the Fund by the Tavistock Institute concluded that the Fund's recipients benefited. It also identified the importance of management buy-in and good communication skills as essential components for implementing a successful work-life balance strategy (Nelson, 2004, p38).
- The campaign also established a Ministerial Advisory Committee on work-life balance to complement the work of the Employers for Work-Life Balance Forum, with the aim of advising ministers on work-life balance partnership (Great Britain Department for Education and Employment. et al., 2000).

### 5.3.2 Part-time workers regulations

- The Part-time Workers (Prevention of Less Favourable Treatment) Regulations 2000, (Amendment) Regulations 2002 is part of the Employment Relations Act (1999). These regulations implement the European Directive for part-time workers:

“The regulations ensure that part-timers are not treated less favourably in their contractual terms and conditions than comparable full-timers” (DTI, 2002).

This requires part-time workers’ pay and benefits to be pro rata. It further provides part-time workers with access to occupational pensions and opportunities for training and promotion.

### 5.3.3 The right to request flexible working (2002)

- The right to request flexible working, provided by the Employment Act 2002, and enacted in 2003, obligates an employer to consider an employee’s right to request flexible working. It covers the number of hours an employee works and the time and place of work. Some common requests from employees include: job sharing, part-time working, flexi-time, term-time working, school-hours working, compressed hours, annualised hours and working from home.
- To be eligible to request the right to flexible working, an employee must have twenty-six weeks of continuous service and be:
  - A parent with a child under six years of age
  - Or with a child under 18 who is in receipt of the disability living allowance (DLA).

An employer can refuse the request, but in doing so needs to prove the business case for rejection.

- *Working Families*, an organisation that “helps children, working parents and carers and their employers find a better balance between responsibilities at home and work” (Working Families, 2005) – reviewed the impact of the right to request flexible working a year after its implementation for the DTI (Camp, 2004). The report found that:
  - Within the sample<sup>7</sup>, 40% of parents had requested their right to flexible working
  - 63% of organisations had received a request
  - 60% of the parents reported that their request had been agreed
  - For employers, problems that were anticipated before the legislation was enacted, such as the additional costs, did not materialise
  - The take-up rate of this right has been low in the first year
  - Employees without children see this as an ‘unfair’ benefit and there is also a sense that, given the high cost of childcare, this right is only affordable to those who have higher salaries

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The data was generated from parents and employers via Working Families seminars, advice line, postal and web-based questionnaires. 35 employer (out of 400) and 259 parent responses were received.

- The main issues parents identified as needing further consideration are:
  - More awareness for fathers
  - High cost of childcare
  - Permanent nature of change
  - More awareness of legislation and procedures
  - Stronger legal powers
  - Wider eligibility (to all employees or all carers)
  - Extending flexible working to senior positions.
- The DTI have also undertaken some preliminary research on the right to request flexible working, commissioning the ONS to include a module of questions about flexible working (in late 2003 and early 2004). The *Results of the first flexible working employee survey* showed that 52% of employees were aware of the right to request flexible working (Palmer, 2004). Since April 2003, 13% of employees had requested to work flexibly, with 86% of requests either being partly or fully accepted by employers. The most common request was to work part-time (38% of requests) or under flexitime arrangements (25% of requests). 37% of working women and 10% of working men with children under six had made a request.

#### 5.3.4 Working time regulations

- The Working Time (Amendment) Regulations 2002 provides basic rights and protection for workers. It limits workers to an average of 48 hours work a week (unless they choose to work longer), makes provisions for annual paid leave, outlines the number of hours employees can work and obligates an employer to provide rest periods (DTI, 2004b).

#### 5.3.5 Leave arrangements

- The following list below outlines legal requirements, although some organisations' provision exceeds statutory requirements:

##### Maternity leave

- Maternity leave provides legislative protection against discrimination based on pregnancy:
  - Ordinary maternity leave (OML) is a legal right to 26 weeks of maternity leave, for all female employees (including part-time and fixed term contracts). This entitlement is not based on length of employment. The employee has the right to return to her job at the end of the 26 weeks of OML. Other than pay, employees are entitled to all of their contractual rights such as pension and annual leave (Maternity Alliance, 2004)
  - Additional maternity leave (AML) is a further legally protected entitlement. An employee may take an additional 26 weeks leave, conditional on having been employed for 26 weeks. The employee has the right to return to her job, or when this is not possible, to be offered a job with similar terms and conditions. Organisations with less than five employees do not have a legal obligation to offer the same job (Maternity Alliance, 2004)
  - Statutory Maternity Pay (SMP) is maternity pay for 26 weeks. It is conditional on the employee having 26 weeks of continuous service. The first six weeks are paid at 90% of average salary. The remaining 20 weeks are paid at a 'basic rate' which is either a flat rate of £102.80 per week or 90% of weekly wages, whichever is smaller (Maternity Alliance, 2004)

- Maternity Allowance (MA) is maternity pay for those who are not eligible for SMP. It is a government benefit for women who are self-employed, who have changed jobs during pregnancy, or who have had low income or periods of unemployment throughout their pregnancy. The rate of pay is £102.80 a week for 26 weeks or 90% of average earnings if that is less. Other eligibility conditions of MA are that a woman has worked for 26 weeks of the 66 weeks before her baby is due and that there are 13 weeks within that period where she earned over £30 a week (Maternity Alliance, 2004).

#### Paternity leave

- Paternity leave is a legal right for fathers to take leave. The entitlement is for up to 2 weeks leave. The employee must have 26 weeks of continuous service and have or expect to have responsibility for the child. Employees who fulfil eligibility criteria are entitled to Statutory Paternity Pay (SPP) of £102.80 a week or 90% of average weekly earnings if less than this (Working families, 2004).

#### Adoption leave

- Leave for those adopting is similar to maternity and paternity leave. Ordinary Adoption Leave (OAL) is for 26 weeks. Additional adoption leave (AAL) provides for a further 26 weeks leave, conditional on 26 weeks of continuous service. Statutory Adoption Pay (SAP) is paid for the OAL period (Great Britain Department of Trade and Industry, 2003).

#### Payment for maternity and paternity leave

- Payment for SMP and SPP are initially covered by the employer. Some funding in advance is available from Inland Revenue. The employer pays the employee and then claims back through the Inland Revenue. Employers can recover 92% of payments with some small and medium enterprises (SME) able to recover up to 104.5%. Both SMP and SPP rates are due to increase to £106 per week from April 2005 (Business Link, 2004a).

#### Parental leave

- Parental leave provides parents with unpaid time off to care for a child. A maximum of 13 weeks up until the child is 5 or the fifth anniversary of adoption is protected. Parents of children who receive the disability living allowance (DLA) are entitled to 18 weeks leave up until the child is 18. Each parent is eligible to take parental leave – conditional on having been employed for a year at the same employer (Working Families, 2004).

#### Emergency family leave

- Emergency family leave provides protection for employees to take leave for dealing with specific circumstances. There is no eligibility requirement for employees. Employees are entitled to time off to deal with an illness of a dependent (any person who relies on the employee for help), of unexpected changes to childcare arrangements, or to deal with matters arising from the death of a dependent (an employee's spouse, child or parent, or a person living with the employee in the same household). This leave is unpaid, but some employers provide coverage (Working Families, 2004).

#### *5.3.6 Childcare provision*

- The UK Government has traditionally been reluctant to provide childcare as it has been seen to be within the private sphere of the family. However, childcare provision in terms of entitlements and the quality and quantity of childcare are becoming increasingly important to politicians politically. The main political parties have recently prioritised childcare needs as important for children in their learning and development, and for parents in providing more choice and opportunity for work (Brown, 2004, Howard, 2004, Kennedy, 2005).

- The current lack of childcare provision and the high cost of childcare are prohibitive for many working families. The average cost of a full-time nursery place for a child under two in England is £141 a week. In Scotland, it is £122 and in Wales £120 a week. Childcare is the most expensive in London where the cost is typically £197 a week, showing an increase of 5.2% – three and a quarter times the rate of inflation (Daycare Trust, 2005). As female participation in employment continues to rise, the political prominence of childcare issues is expected to continue to gain further momentum.

#### **5.4 EU comparative perspective**

- In a comparative study of ‘work-family arrangements’ in Sweden, UK, Netherlands and Italy, British companies had adopted the largest number of work-family arrangements whilst Swedish companies had the fewest. This difference may be explained by the variation in state provision of childcare assistance and facilities. Provision to assist their employees is potentially more relevant to UK companies, whereas in Sweden this would be superfluous given the extensive state-sponsored childcare network (Dulk, 2001)
- Table 12, compiled by Fagnani et al provides some comparisons between European countries, placing UK provision in a comparative context for maternity and paternity leave. Parental leave is not included in the table. It is difficult to compare national contexts in this way as much of the necessary context, such as frameworks for policy development, is absent. Nevertheless, it is a useful indication.

<b>Table 12: Statutory leave arrangements for parents – Summary table</b>						
	<b>Maternity leave</b>		<b>Paternity leave</b>		<b>Childcare leave</b>	
	<i>Duration</i>	<i>Benefit</i>	<i>Duration</i>	<i>Benefit</i>	<i>Duration</i>	<i>Benefit</i>
<i>Bulgaria</i>	135 days	90% of earnings	none		33 months up until child is 3. Can be taken by either parent, or grandparents.	Flat rate for 21 months, unpaid for final 12 months
<i>France</i>	16-26 weeks	84% of earnings	11 days (two weeks)	84% of earnings	36 months up until child is 3 (including maternity leave) Family entitlements, can be shared between parents. Part-time allowed.	Flat-rate if with two or more children: €460 / month
<i>Netherlands</i>	16 weeks	100% of earnings with ceiling	2 days	100% of earnings with ceiling	13 weeks each parent until child is 8.	Unpaid
<i>Norway</i>	42 or 52 weeks	100% of earnings (42 weeks) or 80% of earnings (52 weeks)	4 weeks	100% of earnings (if the mother works more than 75%) paternity quota (reserved for the father)	52 weeks. Each parent is entitled to 1 year's unpaid leave, in addition to the parental leave period of 52 weeks.	Unpaid
<i>Portugal</i>	120 days	100% of earnings	5 days	100% of earnings	6 months for each parent until child is 3.	Unpaid
<i>Slovenia</i>	105 days	100% of earnings	90 days	15 days: 100% of earnings; then 75 days paid by social security (statutory minimum income)	260 days. Can be shared between parents. Part-time job allowed until child reaches 3.	100% of earnings
<i>Sweden</i>	12 weeks	80% of earnings	2 weeks	80% of earnings	18 months each parent until child is 8. Part-time leave allowed.	80% of earnings for 360 days and €6.50 / day for 90 days with ceiling.
<i>UK*</i>	26 weeks for all women, additional 26 weeks if with employer for 6 months.	90% of earnings for 6 weeks. Remaining 20 weeks either flat rate of £102.80 or 90% of weekly earnings.	2 weeks (must take within 56 days of birth).	Either flat rate of £102.80 or 90% of weekly earnings.	12 weeks each parent until child is 5. Up to 4 weeks only in any one year.	Unpaid

Source: (Fagnani, 2004)

\* The UK data presented has been updated for this project to reflect the most recent changes in provision.

## **6.0 WAYS FORWARD**

### **6.1 A fuller response to demographic change**

- Reverting to the question posed in Section 1 of this paper – focus versus breadth? – our review identifies that both are at play. Conceptually, the policy discussion has widened to encompass a more holistic, comprehensive approach, as in the DTI's language that references "combining work with other responsibilities or aspirations."
- Actual policy initiatives, however, focus far more narrowly – on people as workers, on workers as parents, as parents with young children.
- The demographic data alone challenge the restricted focus on parents with young children, in their implicit call for attention to the increasing ageing population, not only from the vantage point of people requiring 'elder care', but for those healthy, alert older people aspiring to active ongoing engagement in the central streams of activity. The opportunities that people in this age-band offer the economy to use their skill and experience may be ignored, but the opportunity that participation in the labour market can these people - for income, social connection, structured time and intellectual stimulus is less likely to be overlooked, because these voters can campaign for their interests.
- However, the UK's participation in Europe has promoted the additional significant influence: equality, and with this, a focus on diversity. The association between equality and employment in legislation has implications for other constituencies besides parents of young children. Whilst today's test case is a young pilot who challenges the legitimacy of the flying hours required by her employer because of their impact on her available time to spend with her child (Elliot et al, 2005), other challenges from people in the diverse roles caricatured in the opening of this paper, and from people in other situations – older people, people with older children, people who do not have children, and so on – will surely broaden the focus.

### **6.2 Contemporary currents in social discourse**

- Whilst the concept of work-life balance recognised by government reflects some breadth, its campaigning language is strongly focussed on the workplace and worker productivity – recruitment, motivation, retention, absenteeism, costs and customer service.
- The social discourse on these issues goes far wider than this, and shows no sign of abating. On the contrary, the purchase that work has on people's lives – both practically and emotionally, as described in accounts like Hochschild's 'The Time Bind' (1997) and Bunting's UK version, 'Willing Slaves' (2004) is also being challenged, with suggestions that with 'post materialism', people may be willing to settle for less financial reward in order to shape and fill their lives more agreeably, with less negative impact on care in all its meanings – for oneself, family, neighbourhood and society. The reported 'Out of the office into the classroom' shift of both senior and middle managers to secondary school teaching jobs is one index (Milard, 2004).
- There are other hard unanswered questions, not least those surrounding flexible work. Whilst Richard Sennett's questioning of the effectiveness for the life skills associated with workplace flexibility for the work of parenting touches a depth not countenanced by policy or legislation, its suggestion of the reported renegotiation in personal modes that is required as with continuous shifting between roles may well be experienced by many (Sennett, 1998). A related question is whether flexible employment is conducive to



stable, tolerant, productive societies (Seager, 2004). A step on (Browne, 2003) is Jonathan Porritt's observation, as chairman of the Government's Sustainable Development Commission, and campaigning against economic growth:

"We can no longer depend on our growth-obsessed model of progress to generate the improvements in quality of life and personal wellbeing that people are now so hungry for."

This is joined by Lord Layard, who calls for more human welfare and less work, and arguing that public policy should primarily be aimed at raising levels of happiness.

- Another argument champions the value of the breadth that part-time or flexible workers bring to the workplace:

"You learn more about the myriad ways the world is subtly changing by standing at the school gates than from any marketing report. And this knowledge and perspective is not nebulous self-improvement, it accompanies us to the office, the sales pitch, the boardroom."

This writer co-opts the productive workplace model to campaign for workers who want broader lives (Turner 2004).

- Yet another view questions the risk / toll to fertility involved in people deferring parenthood till their careers are more established, floating an alternative whereby employees have their children younger, with workplaces accepting that their twenties are a time when young men and women will be divided in their attentions to work and family, with more concerted attention to work following later when their families are more established (Clanchy 2004).

The above references include snippets sampled from a wider discourse that is currently on the boil. The media are FULL of views and researched references on the underlying topic of how people can structure their lives better.

### **6.3 Useful research questions**

- The point in raising these perspectives in this concluding discussion is to point to the relevance of a broader approach. Without dismissing its importance to many recipients, family-friendly provision as currently conceived and offered elicits low uptake and runs the risk of being 'empty shell' (Hoque and Noon, 2004).
- Expanding the focus from parents with young children as the key constituency, and encompassing a broader range of indicators such as the well-being, job satisfaction, life satisfaction and stress reduction that are found in the literature but marginalized by the preoccupation with productivity indicators in government and corporate policy, may be more appropriate.
- A more holistic work-life perspective would admit a focus on life domains other than work and family, enlarging the perspective to work-life and thereby including foci on life domains like leisure, social participation, neighbourhood, community and finance, as championed by numerous researchers (Rapoport et al., 2002, Warren 2004, Perrons 2000). It also allows for a view of workers, who as more rounded people, may better contribute to workplace effectiveness (Rapoport et al., 2002, Ruderman et al, 2002, Turner 2005).

- This also admits a focus on the content, design and location of workplaces and homes, as well as on the other built settings that affect how lives are structured and the quality with which they are lived.
- A challenge to this – as ever – is drawing boundaries. How could the effectiveness of more broadly conceived family-friendly provision be measured? What sorts of criteria would be good indicators of success? What outputs would indicate success? Or is it better to measure performance based on more narrowly defined provisions, even if we recognise that they miss the mark in being too limited and too poorly aligned to the realities of people's lives?

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