

# **WORKCARE**

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## **Social Quality and the Changing Relationship between Work, Care and Welfare in Europe**

**CIT5 Contract No. 028361**

Literature review

May 2007

Working Paper 1

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Homepage of the project: <http://www.abdn.ac.uk/socsci/research/nec/workcare/>

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# INTRODUCTION

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Claire Wallace

This literature review is the first working paper of the project WORKCARE (CIT5-028361) which is funded under the Sixth Framework Programme of the European Commission. It is intended as an overview of the research field that will be covered in the project and as a way of framing research questions which will be followed up in the research. It is divided into four chapters additional to this introduction and each chapter represents one of the key themes of the research.

The first chapter critically describes and analyses the social quality approach, the theory which provides the background to this research. The subsequent chapters explore aspects of social quality in more detail by relating it to work-life balance, labour market transitions, fertility, social and labour market policies and flexibility. A key theme in this is the capabilities perspective because it emphasises structure in addition to agency and this is critically evaluated in Chapter 2.

The aspect of care that is the main focus of this project is that of childcare, even though other aspects of care (for example of the elderly) are also important. Given the scope of the project it was only feasible to focus upon this one aspect. The project partners will be analysing a range of secondary sources, including the ECHP (the European Household Panel Study), the ISSP (the International Social Survey Programme), the HWF survey (Households, Work and Flexibility) and the European Quality of Life Survey, known as the EQLS. Using these data sources, a range of topics can be explored.

These quantitative sources are combined with a qualitative study whereby

households are analysed in the following countries: UK, Denmark, Italy, Hungary, Poland, Portugal, and Austria in order to look at how households themselves perceive and construct work and care decisions. This will be the focus of future working papers, which will be published on our home page as well as in written form

(<http://www.abdn.ac.uk/socsci/research/nec/workcare/>).

Although a great deal has been written about these themes in recent years, this project takes a pan-European perspective to look at what is happening right across the European Union (where data are available).

The aims of the research are:

- To describe and analyse European-wide patterning of welfare, work and care drawing upon a variety of methods
- To develop and apply a social quality perspective enabling a synthesis of macro and micro levels of analysis
- To analyse social policies for work and care at both European and national levels
- To explain transitions between work and care on a comparative basis
- To bring in an agency or capabilities perspective on the analysis of work and care by trying to understand the underlying values, cultures and strategies of households in Europe
- To look at the role of flexibility in understanding combinations of

work and care both inside and outside the formal labour market.

This report represents a joint effort by a number of people in the team and the chapters bring together their various ideas.

**FROM QUALITY OF LIFE TO SOCIAL QUALITY:  
RELEVANCE FOR WORK AND CARE IN EUROPE**

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Claire Wallace & Pamela Abbott

This paper represents part of the work carried out for the “WORKCARE” Project as work package 1. It describes the literature related to Social Quality and Quality of Life, concepts that form a core part of the project and were emphasized in the original call for proposals. By linking the much-researched topic of work and childcare to these more general policy-related theories, we aim to set the project

results within a broader framework and find new perspectives.

The review here looks at how Social Quality emerged from the Quality of Life literature and how this can be related to the issue of work and care. It draws upon the European Quality of Life Survey carried out by the European Foundation for the Improvement of Living and Working Conditions in 2003.

## 1. THE ORIGINS OF SOCIAL QUALITY

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The Social Quality approach arose from an initiative launched under the Dutch Presidency of the European Union in 1997 by a network of social scientists. The aim was to counteract the neo-liberal and economistic tendencies within European integration and to put forward an alternative vision of a social Europe. Whilst the idea of a social Europe has strong support within the European Union, and is exemplified in the profusion of concepts such as “social cohesion” “social inclusion” “social exclusion” “European Social Model” and so on, the problem was that these concepts are not linked in any theoretically coherent way, are often used inconsistently and are largely empty of content. The aim of the Social Quality initiative was therefore to develop a theoretically consistent model which could provide a basis for policies and which could be empirically grounded (Beck et al., 2001).

Social Quality is defined by the authors of this initiative as “the extent to which citizens are able to participate in the social and economic life of their communities under conditions which enhance their well-being and individual potential” (Beck et. al, 2001: 6-7). The idea of Social Quality draws to a great extent upon the literature of the Quality of Life, which has a much longer history. Therefore, we shall now turn to explaining

this concept and its relationship to Social Quality.

### 1.1. QUALITY OF LIFE

The Quality of Life is an established body of social theory which considers individual well-being by defining a range of objective indicators on the one hand (such as income, housing conditions, employment etc.) and subjective indicators on the other hand, which are concerned with how satisfied individuals are with these various aspects of their lives. It draws upon the Nordic tradition of documenting living conditions for the former, and the American tradition of looking at subjective satisfaction and happiness for the latter. This concept has been extensively researched both in Europe (Noll, 2000, Noll and Zapf, 1994) and in the US. Much of the quality of life material is published in the *Journal of Social Indicators* and a European Centre for Social Indicators has been set up at Mannheim University.

The Quality of Life indicators are intended to add a new dimension to the more usual economic indicators of well-being used in measuring social progress and comparative social situations. The Quality of Life perspective is intended to go beyond GDP or income or consumption to look at the human progress that can be



found in European societies and bring in a subjective as well as an objective dimension.

The usual approach to the Quality of Life, embodied in several publications of the European Foundation for the Improvement of Living and Working Conditions is to identify a series of life domains (employment, housing, standard of living, family relations, social life, health etc.) and to identify a range of indicators under each of these domains (Rapley, 2003, Fahey et al., 2004). The key indicator however, is that of satisfaction and this can be defined as satisfaction with any one of the domains or satisfaction with life in general (usually a single variable indicator). Alternative measures are happiness (also a single variable indicator) or more rarely, alienation (Bohnke, 2005). Hence this is largely an individually-oriented concept. It is concerned with the individual levels of living (living conditions) and individual subjective perceptions of conditions (satisfaction and happiness).

However, the Quality of Life approach has been adopted by the European Commission as a way of looking at European societies and measuring their progress. It has been used a way of understanding the well-being of citizens across Europe and thus forms a part of the European policy framework.

It has proved attractive as a policy tool where it was felt that both subjective as well as objective indicators should be taken into account and this principle is now becoming well established (Noll, 2004, Noll, 2002). It is seen as a way of monitoring social change and measuring well-being in the society. This is partly why indicators have become more available on a comparative basis. For example the Social Indicators project based at ZUMA Mannheim has put together a web site listing social indicators and the European Foundation for the Improvement of Living and Working Conditions has likewise constructed a

publicly available interactive database of quality of life indicators across Europe (<http://www.eurofound.eu.int/areas/qualityoflife/eurlife/index.php>).

One criticism of this approach however, is that it largely a-theoretical. It simply measures a range of subjective and objective factors without really giving any theoretical framework. In the 1970s, Allardt tried to develop a more conceptual approach to the Nordic studies of living conditions by grouping them according to “having” (material needs), “loving” (social needs, relations with friends and family) and “being” or (need for personal growth, integration into wider society) (Allardt, 1993). Later on “living in good health” was added to Allardt’s scheme (Bohnke, 2005). This approach has been used by the European Foundation in organizing the indicators that are collected and analysed, but it is still largely unrelated to social theory in general and tends towards a more psychological theory of needs that is also individualistically founded.

The main criticisms of the Quality of Life approach are both theoretical and methodological. For the theoretical criticisms, we can point out that first of all the fact that the number of domains could be expanded indefinitely along with the number of indicators. For example, why not include social participation, culture and arts, environmental quality etc.? This amounts to simply an additive list of indicators without any real theoretical foundation. In addition, as we have indicated throughout, the Quality of Life approach is individualistic in orientation – it considers the individual as an isolated unit of analysis. This reflects its foundation in psychological literature. Furthermore, it assumes that the individual is rather a passive recorder of their life circumstances rather than active in constructing their lives. It assumes that if living conditions are improved, individuals will be grateful. Thirdly “life satisfaction” was not always closely related to living conditions measured by other criteria, and

happiness was even further away from living conditions. It seems that happiness more often measures individual states of emotion rather than general well-being in a more sociological sense.

Methodological criticisms centre on the nature of the key indicators and what they can tell us. On a methodological level, single indicators such as life satisfaction are rickety foundations for establishing general theories – it is better to use batteries of empirically validated questions (Near et al., 1987, Near and Rechner, 1993, Rose, 2005). Furthermore the idea of “happiness” and “satisfaction” as measures of individual well-being are inherently problematical. Satisfaction can be a rationalization for existing (unsatisfactory) conditions because there is no obvious alternative. This is one reason why many things that one would expect to detract from life satisfaction have no impact upon it. Work stress, poor work-life balance etc. are all weakly or not really related to life satisfaction. Women doing part-time work for few rewards may be satisfied because they have low expectations.

Before going on to look at how the idea of Social Quality can improve on these problems, we shall consider the role of life satisfaction more generally and its variation across Europe.

## **1.2. LIFE SATISFACTION AND HAPPINESS**

There is a long history of (mainly social psychological) research on life satisfaction or subjective Quality of Life using life satisfaction and happiness as the main dependent variable (Diener and Suh, 1997). The more descriptive European approach centres rather on the development of indicators that can be used as measuring tools. In the most sophisticated Quality of Life approaches, for example Berger-Schmitt and Noll (Berger-Schmitt and Noll, 2000) and Fahey et al (Fahey et al., 2004, Fahey et

al., 2003, Fahey and Smyth, 2004), the indicators are well developed and the methodology used to select them rigorously defined. However, they are not derived from theory and they presuppose existing social relations and structures – they are concerned with describing what is there already based upon the rather simple idea that objective and subjective factors would reinforce one another. They are not concerned with opportunity structures available to individuals and what is achievable.

This Life Satisfaction approach asks people directly about their satisfaction/happiness with their actual life circumstances. The individual defines well-being, whether in terms of general satisfaction/happiness with life (e.g. Argyle 2000) or within domains of life specified by researchers (e.g. Cummins 1996; van Praag *et al* 2003). The research has been concerned with analysing people’s reports of ‘happiness’ (which is generally seen as an indicator of emotion or mood) and ‘general satisfaction with life’ (which is generally taken as an indicator of people’s cognitive evaluation of their circumstances). Subjective well-being has been shown to be an internally consistent and relatively stable construct – not just the reflection of immediate affect (but not so stable as to suggest that the scales measure purely an invariant trait of persons) – and there is evidence that it does to some extent reflect surrounding circumstances in the fact that it tends to be lower in deprived third-world countries than in the more affluent West.

The Quality of Life approach originated in the Western and Northern countries of Europe and is sometimes criticized for pre-supposing a universal welfare state. Noll (2000), in attempting to classify approaches to Quality of Life, to distinguish those that focus on individual Quality of Life from those that emphasise the distribution of welfare, or social relations or the quality of societies. The Quality of Life approach combines a

concern with the objective cultural, political and economic contexts in which people live their lives and their subjective evaluation of their life situation (e.g. Berger-Schmitt and Noll 2002; Fehey *et al* 2002). The idea has been extended to some extent by sociologists who relate this to variables such as social class, living conditions and so on and more recently it has been discovered by economists trying to find an alternative to narrowly economic indicators. According to Richard Layard, for example, whilst income has more than doubled in the last 50 years, people seem to have become more unhappy (Layard, 2005). He argues therefore that to study the well-being of a society, we must take other factors into account including individual well-being and social environment.

If we turn now to the measurement of Quality of Life in Europe using a recent survey (2003), we find some important variations across Europe. In the EU 27 countries (all member states from 2007)

satisfaction varies more than happiness, with satisfaction being closely related to economic levels (GDP) and degree of modernization, whilst happiness is less closely related in this way. Table 1 shows a wide variation in the correlations between happiness and satisfaction in different European countries as well as large variations in the standard deviation around the mean, especially in the poorer countries. The correlation coefficients between life satisfaction and happiness vary between 0.74 in Sweden and 0.57 in Bulgaria at the other end of the satisfaction continuum. In Chart 1 we see that there is a convergence between life satisfaction and happiness in the richer countries and a divergence in the poorer countries, although both generally increase with affluence.

In general, it is assumed that happiness reflects affective states of being, whilst satisfaction reflects a more cognitive orientation.

**Table 1.1. Subjective Quality of Life in Europe. N, means and standard deviations of overall satisfaction and happiness with life and the correlation between both indicators.**

Country	Life Satisfaction (Q31)			Happiness (Q42)			Correlation	
	N	Mean	SD	N	Mean	SD	N	Pearson's r
DK	997	8.4	1.52	985	8.3	1.40	985	0.70
FI	991	8.0	1.51	976	8.1	1.42	975	0.69
SE	999	7.8	1.69	994	7.9	1.66	993	0.74
AT	1001	7.8	1.78	990	7.9	1.75	992	0.66
LU	593	7.7	1.94	598	8.0	1.70	588	0.51
IE	981	7.7	1.76	920	8.1	1.68	917	0.67
NL	1035	7.5	1.26	970	7.7	1.25	968	0.70
BE	1000	7.5	1.61	982	7.7	1.49	981	0.69
ES	1001	7.5	1.73	972	7.8	1.67	972	0.61
UK	989	7.3	1.97	983	7.7	1.81	966	0.66
MT	591	7.3	1.98	571	7.9	1.66	560	0.52
DE	1050	7.2	1.94	1040	7.6	1.81	1046	0.65
IT	997	7.2	1.59	987	7.5	1.55	983	0.64
CY	588	7.2	2.09	590	7.8	1.96	582	0.73
SI	598	7.0	1.94	596	7.4	1.81	598	0.67
FR	1028	6.9	1.64	1028	7.3	1.51	1026	0.68
EL	997	6.8	2.21	991	7.6	1.93	986	0.62
CZ	981	6.5	2.13	985	7.2	1.87	973	0.66
RO	1019	6.2	2.28	1022	7.2	2.02	1015	0.61
PL	984	6.2	2.28	981	6.9	2.12	972	0.63
PT	992	6.0	2.07	974	6.8	2.02	974	0.54
HU	971	5.9	2.17	981	7.1	2.10	963	0.55
EE	586	5.9	2.02	579	6.8	2.03	579	0.65
SK	1065	5.7	2.37	1063	6.5	2.04	1061	0.67
TR	996	5.6	2.74	993	6.5	2.47	991	0.60
LV	988	5.5	2.12	951	6.4	2.06	941	0.56
LT	996	5.4	2.17	988	6.4	2.18	987	0.63
BG	982	4.4	2.32	978	5.9	2.36	959	0.57
<i>EU15</i>	<i>14640</i>	<i>7.3</i>	<i>1.80</i>	<i>14449</i>	<i>7.6</i>	<i>1.68</i>	<i>14359</i>	<i>0.65</i>
<i>EU25</i>	<i>23006</i>	<i>7.1</i>	<i>1.92</i>	<i>22747</i>	<i>7.5</i>	<i>1.77</i>	<i>22587</i>	<i>0.65</i>
<i>NMS10</i>	<i>8328</i>	<i>6.1</i>	<i>2.25</i>	<i>8312</i>	<i>6.9</i>	<i>2.08</i>	<i>8219</i>	<i>0.63</i>
<i>CC3</i>	<i>3017</i>	<i>5.6</i>	<i>2.64</i>	<i>3010</i>	<i>6.6</i>	<i>2.39</i>	<i>3000</i>	<i>0.61</i>

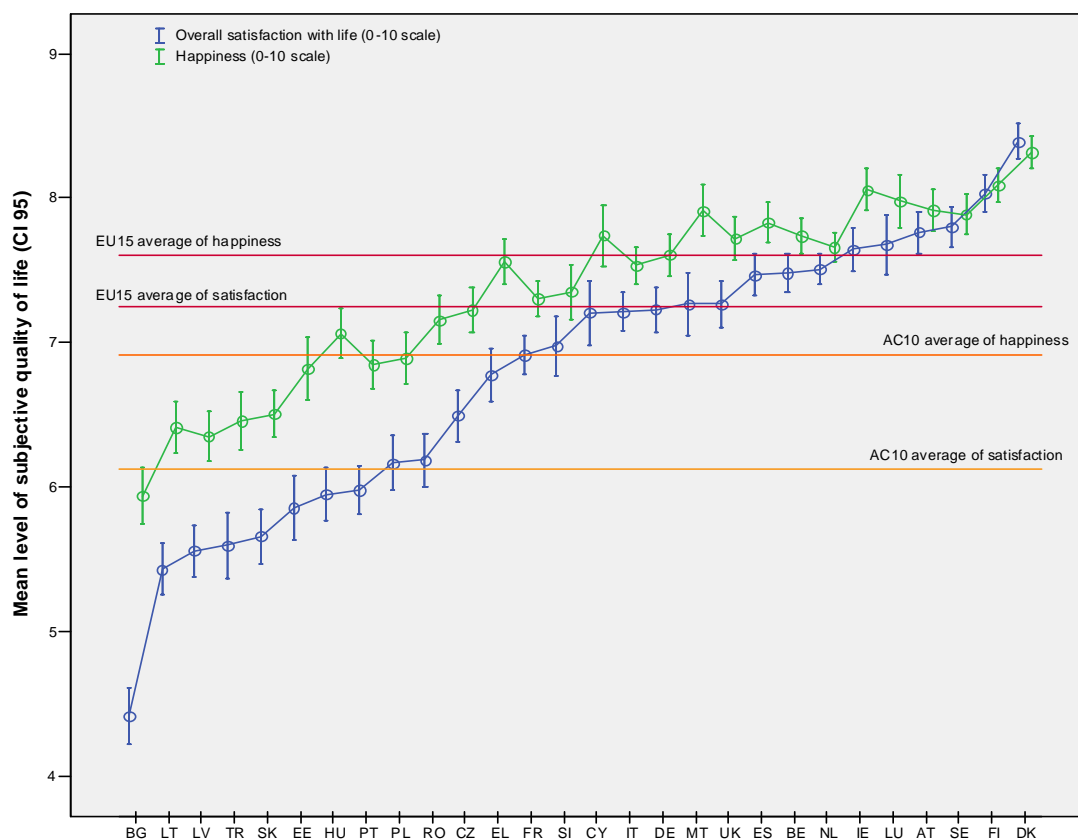
Questions:

Q31: All things considered, how satisfied would you say you are with your life these days? Please tell me on a scale of 1 to 10, where 1 means very dissatisfied and 10 means very satisfied.

Q42: Taking all things together on a scale of 1 to 10, how happy would you say you are? Here 1 means you are very unhappy and 10 means you are very happy.

Source: the EQLS 2003, data weighted accordingly.

**Chart 1.1. Levels of overall satisfaction with life and happiness in Europe. Ranked according to ascending levels of satisfaction with life. Means and 95% Confidence Intervals of two basic indicators of subjective Quality of Life.**



Source: the EQLS 2003, data weighted accordingly.

It seems that in poorer countries fulfilling basic needs is most important for meeting life satisfaction, and in these countries just having a liveable income is important for well-being. As societies become more affluent however, other factors start to become more important. In the case of job satisfaction, this moves from having a job with a good income to looking more for intrinsic rewards such as having an interesting job or one with career prospects (Wallace et al., 2007). However, in all EU countries, being young, having a job, having a partner and being healthy lead to higher levels of life satisfaction (Delhey, 2004).

Quality of Life – like the economic indicators that it is intended to replace - is designed as a universalistic theory. However, it assumes the existence of welfare states and a generally high level of well being, such as is found in Western Europe, so that other needs, beyond mere survival become important (Maslow, 1954). We may ask whether once basic needs are fulfilled, life satisfaction is culturally relative. It may vary according to country, gender and ethnic group (Calloni, 2001). What may lead to satisfaction in one country would not necessarily do so in another. Life satisfaction is also affected by cultural norms and adaptation to situations. Hence,

people in Eastern European countries experience a very unequal division of labour in the home but do not necessarily report that they are unsatisfied with this, whilst women (and men) in Sweden have a much more equal division of labour and yet are more dissatisfied with it (Strandh and Nordenmark, 2003). Similarly, people in Tokyo in a recent study, were not happy in general despite high levels of affluence

and good social services (Abbott, 2007). This implies that in some countries people might be discontented, whatever their living conditions. Unhappiness could be culturally specific. This would help to explain also the relatively weak correlations between happiness, satisfaction and living conditions in Europe.

## 2. FROM QUALITY OF LIFE TO SOCIAL QUALITY

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The problems identified with the Quality of Life approach led to its reconceptualisation as Social Quality. Quality of Life approaches have demonstrated that, beyond a certain level of economic development, subjective satisfaction does not increase and is highly stable in Western societies (Eckersley, 2000, Eckersley, 1998, Cummins, 1995, Cummins, 1998). However, people are less positive about the Quality of their society. Beyond the economic threshold reached in Western societies, people become concerned about income distribution, the burden of unpaid housework, the loss of natural resources and the costs of unemployment (Eckersley, 2000, Halstead, 1998, Hamilton, 1998). People's own subjective Quality of Life is most influenced by the more personal and intimate aspects of life, which seems to act as a buffer against multiple negative shifts in personal circumstances. Yet, there appears to be an erosion of confidence in society and its future resulting in a loss of trust and the privatisation of life (Bauman, 1995, Eckersley, 2000). In particular there is concern about the negative impact of economic changes on family life (Pusey, 1998), resulting in the breakdown of traditional values, the breaking of existing family networks and too much consumerism. It is evident that citizens in Western societies at least are concerned as much about social and environmental issues as they are economic growth.

Indeed, lack of satisfaction in Western Europe is highest on average in those countries with the lowest levels of economic inequality and strong welfare states paid for from high levels of taxation (Fehey *et al.* 2000). Therefore, the Social Quality approach seeks to explain some of these wider factors more thoroughly than by simply relying on satisfaction or happiness as indicators.

The Social Quality approach also aims to bring in the extent of control or empowerment of individuals in their social lives and this is a factor which moves it beyond the largely passive Quality of Life approach. Hence it includes the idea that people have to exercise control over their lives in order to maintain well-being and fulfil their capabilities.

The Social Quality approach emphasizes the social as well as the individual dimensions. It measures the quality of the *social context* of everyday life, differs from the Quality of Life approach in that it is grounded in a theory of 'the social' – it is a sociologically grounded approach, as opposed to the Quality of Life approach, which takes the perspective of the isolated individual as the ultimate reality. The Social Quality approach does focus on the individual, but as an active subject living in developing social conditions. 'The Social' is seen as the outcome of the dialectical relationship between the formation of collective identities and the self-realisation of the

human subject. The ‘social space’ is realised in and between four constitutive factors – socio-economic security, social cohesion, social inclusion and social empowerment. In other words, it is concerned with the dialectical and recursive relationship between agency and structure and provides a vision for the future about how the Social Quality of a society can and should be improved. It provides the essential link between need, action and policies, between economic and social development. It measures the extent to which the quality of daily life provides for an acceptable standard of living, taking account of the structural features of societies and their institutions as assessed by reference to their impact on citizens. Hence, it incorporates a mixture of structural and individual-level factors.

The Social Quality perspective is explicitly ideological in that it takes the existence of Western welfare states and liberal norms for granted.

..underlying the four conditional factors is the process which, via the constant tension between self-realisation and the formation of collective identities, people become competent actors in the field of Social Quality. Essential in this process are the rule of law, human rights and social justice, social recognition/respect, social responsiveness and the individual’s capacity to participate (Van der Maesen *et al* 2005).

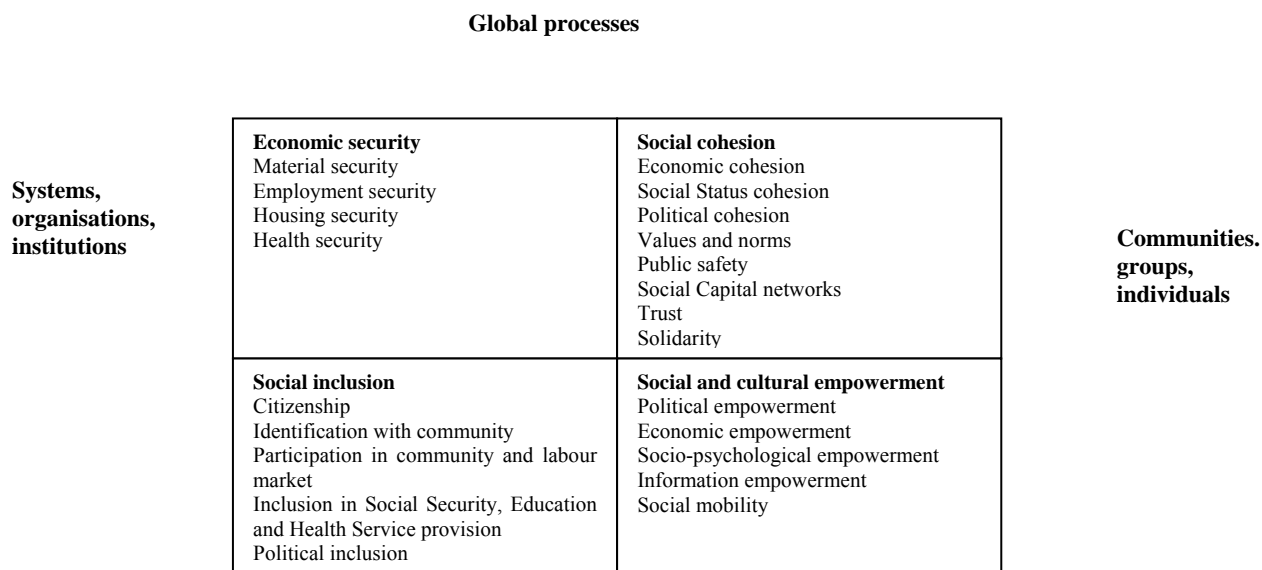
The Social Quality approach, based on the established critique of narrowly economic explanations in terms of objective economic criteria and/or the medical understanding of well-being, insists that we have to consider the articulation between the quality of society and the subjective quality of individuals’ lives within it. It means going beyond a description of objective living conditions and taking account of the subjective understanding by the citizens of their life situation and the extent to which they feel able to make the necessary choices in order to act to secure their well-being – to choose a style of life they value. People are embodied social beings, located in a given

time and place, active in meeting their own needs in that context, and they need to be empowered to do so. Hence, Social Quality defines the space within which citizens are able to participate in the social and economic life of their communities under conditions which enhance their well-being and individual potential. Indeed, for some the Social Quality approach represents a way of improving democracy and compensating for the “democratic deficit” in the European Union (Therborn 2001). Quality is a process as well as an outcome. It requires the empowerment of individuals, the provision of economic security and other resources, the ability to participate in social life and a shared set of norms and values.

Modern democratic societies ... [need] real opportunities for citizens to address their concerns, to develop their own visions and to enable themselves to contribute to an equitable and fair society (Beck *et al* 2001: 246)

Social Quality is conceptualised through four domains or areas – economic security (necessary material resources), social cohesion (necessary accepted norms and values in place), social inclusion (access to necessary institutional and infrastructural context) and cultural empowerment (the extent to which citizens feel they have control over their own lives and the capacity to act) – see Figure 1. These are expressed as four quadrants which are the product of the relationship between global processes and biographical processes on the one hand and that between systems, institutions and communities (Gesellschaft and Gemeinschaft) on the other. The up-down axis of the quadrant represents the relationship between the micro and the macro, the individual and the structural. The left-right axis of the Social Quality quadrant represents the relationship between system and community, between system integration and social integration in the words of David Lockwood (Lockwood, 1999).

**Figure 1.1. The Social Quality Model**



**Biographical processes**

Since the four quadrants measure four complementary aspects, some indicators can contribute to the measurement of more than one quadrant. Economic security means having available the necessary material resources; social inclusion (citizenship), having access to the necessary institutional and infrastructural context; social cohesion, that the necessary collectively accepted values and norms are in place; and empowerment, that people feel that they have control over their own lives and the capacity to act and that they have the necessary knowledge, skills, experience and funding to do so. The indicators of Social Quality are still being developed. However, it is possible to elicit a number of key indicators that can be used for empirical analysis – indicators that are both objective and subjective. Thus, for example, in measuring economic security both income and subjective satisfaction with income would be measured, and for health both health status and satisfaction with health. This model is based on the assumption that the welfare of citizens is influenced by all four quadrants - that they

form the conditions for each other and influence the outcome. The model takes account of micro- and macro-level structures and agencies – the tension between societal and biographical development, between institutional provision and individual lives.

We shall now look at each of the four quadrants in turn. Starting with economic security, we assume that this includes both subjective and objective measures – the income or material standard of a household and how poor they feel or how far they are able to meet the living standards to which they aspire. Material security can also refer to employment contract, housing and health. Crucially the economic aspect refers to the “capabilities” approach, originally from the work of Sen, including the important distinction between functioning and capabilities (i.e. what an individual is able to do and what an individual chooses to do).

We need to go beyond a description of objective living conditions to take account of the subjective understanding by citizens of their life situation and the extent to



which they feel able to make the necessary choices in order to act to secure their well-being – to choose a style of life they value. In other words, we need to understand the lived experience of citizens. Welfare is about functioning – about the actual socioeconomic circumstances of individuals, about entitlement, opportunities and rights, and the ability of citizens too make positive choices to achieve collectively valued goals in their society (Sen 1993).

Sen has pointed to the importance of extending the narrow focus on resources to consider the substantive freedoms people have reason to value (Sen 1999). Development, for Sen, consists in providing for the expansion of human capabilities. Nussbaum (2000) has developed a non-specific theory which provides a list of ‘functioning’ capabilities that can be modified and adapted to provide a guide to policy and thinking. This is further explored and analysed in Chapter 2.

Social empowerment requires both that the objective conditions exist and that individuals have the ability to make use of the opportunities available to them. Empowerment is both a conditional factor for socioeconomic security, social cohesion and social integration and an outcome of their existence. There are three dimensions to empowerment – access, participation and control.

‘Empowerment’ means to enable people to control the personal, communal and social environment to foster their own development over the environment as well as accessing the environment to enrich their socio-personal life (Herman 2004: 28)

Social cohesion is the glue that binds a society together and creates trust. It provides the rule of law essential for social participation. Social integration and interaction are not possible without shared norms and values and trust in social and economic institutions as well as other groups and individuals.

Social cohesion concerns the processes that create, defend or demolish social networks and the social infrastructures underpinning these networks. An adequate level of social cohesion is one which enables citizens ‘to exist as real human subjects, as social beings’. (Beck *et al* 1995: 284)

Social inclusion in modern societies is the degree to which people are and feel integrated in institutions, organisations and social systems. It is complex concept and requires recognising the need for pluralistic social cohesiveness/multi-inclusiveness (Phillips 2003; Walker and Wigfield 2003) in order to facilitate the inclusion of individuals and communities.

Social inclusion means promoting equality of opportunity and respecting difference in order to enable all to reach their potential. In terms of socioeconomic security, clearly people need resources over time to be able to cope with daily life, enjoy a dignified lifestyle and take advantage of the opportunities available to citizens. An inclusive, socially cohesive society that empowers citizens to enable them to gain control over the necessary socioeconomic resources to ensure security.

Therefore Social Quality represents an advance on Quality of Life because it is more theoretically grounded, because it looks at the social and not just the individual and because it includes new dimensions of agency by allowing for social and cultural empowerment. One question might be: which of these quadrants is more important? In fact Social Quality emphasises all parts of the quadrant because it is concerned with the space that this covers.

Measuring Social Quality requires the construction of both objective and subjective indicators (van der Maesen *et al.*, 2002). It requires considering input, process, outcome and impact. Indicators in terms of education, for example, involve measuring the educational provision (input), the numbers/proportions of children attending school at various levels, the outcomes of education (achievement)

and the impact of education on individuals and society more broadly. The Final Report of the Social Quality Network identifies domains, sub-domains and indicators for measuring each of the conditional factors (nine of them). The authors stress a number of conditions that indicators should meet – they should

- measure conditions that exist empirically
- measure the degree to which social actors may use these conditions to enable them to participate actively

## 2.1. SOCIAL QUALITY AND SOCIAL POLICY

One factor that might affect the variations in Social Quality is social policies. The nature of well-being has to be considered in the context of the institutions, processes and policies that affect it. All real welfare regimes show a mix of market, state and family/community provision, but they differ in the proportions of the mix and, more importantly, in the rhetoric or discourse in which views about welfare provision are expressed. Furthermore, in addition to the discourses that we can use to describe how welfare can be provided to maximize its impact, there are also discourses that enable us to describe or conceptualise Social Quality and to evaluate it. Our understanding of our needs/wants is constrained by our knowledge/understanding of what is possible. What we want or need in order to ‘have a good life’ limited by what we think or know or understand is possible. Wants may exceed objectively structural needs accounts, but conversely they could also fall short of what is objectively possible.

With respect to the policy context, we need to gain a more holistic and accurate profile of what is important to people – the subjective understandings of citizens themselves. In other words, to understand the lived experience of citizens we need to relate agency to structure. This refers to the debates about human

as social actors in the construction and reconstruction of the quality of the social

- be robust and statistically valid
- be able to be measured cross-culturally
- inform public policy
- be timely and susceptible to revision
- actually measure the phenomenon

functioning and capability –the articulation between needs and capabilities (Nussbaum 2000; Doyle and Gough 1991; Gough 2002).

The policy context shapes Social Quality by providing socio-economic security or social inclusion, for example or by providing the basis for social and cultural empowerment. However, it is also shaped by Social Quality in the way that different human and social needs are fed back into the policy process.

Welfare states take different forms. In Europe this is usually expressed in the form of welfare regimes, which may or may not lead to different kinds of social quality (Esping Andersen 1990). The relationship between Social Quality and welfare systems still needs to be established. This leads us to the question of how far Social Quality reflects gender regimes. The Social Quality model appears to be gender neutral, but gender regimes of breadwinner model, modified breadwinner model, dual earner models etc. (Lewis, Daly and Rake) could have important influences upon social quality, not least for women. Although the gender dimension could be incorporated, it has not yet been explicitly thought out.

A further problem is the extent to which Social Quality can be assessed only on the basis of the nation-state or the extent to which it is Europe-wide. Again, this would need to be thought through. Quality of Life is traditionally considered

in terms of national differences, as Chart 1 illustrated.

## **2.2. CRITICISMS OF THE SOCIAL QUALITY PERSPECTIVE**

The Social Quality perspective certainly represents a way forward. However, many of the problems of the earlier Quality of Life perspective remain unresolved. For example, the list of indicators is descriptive and additive, nor is it always clear which indicators belong in which quadrant. For example, gender equality could belong in more than one quadrant. Secondly, the indicators do not always relate very closely to the concepts. For example, the percentage of women in public life does not necessarily mean that they are empowered and national pride, which is listed as an element of cohesion, can also have divisive effects. Thirdly it is not clear if all domains and indicators have equal status or whether some are more powerful than others. The concept has yet to be rigorously empirically tested. Finally, it is not clear how it relates to different policy regimes and welfare systems. Proponents of the model tend to argue for its normative potential rather than considering what it really measures.

## **2.3. APPLICATION OF SOCIAL QUALITY TO WORKCARE**

The Social Quality approach is the one we are endeavouring to use in the Workcare project. Therefore a number of themes need to be related more directly to this perspective. If we turn our attention to the Social Quality quadrant, we could argue that socio-economic security influence work and care in terms of what strategies are open to particular households. Furthermore, social cohesion is important in terms of community and other support available to households. Thirdly, social inclusion is important for understanding the access that households might have to different services. Finally, social and

cultural empowerment is important for enabling different actors to develop strategies and control their environment. Therefore, Social Quality can enable us to see how households are situated within a variety of resources and constraints as outlined by the quadrant. Social Quality enables us to see not only how households manage, but how this relates to the quality of their lives and their environment in general.

The Social Quality model enables us to consider the social dimension rather than only the individual one. In other words, for example, whilst work-life-balance might be satisfying for the individual, is it good for society as a whole? Thus, we might see flexibility as giving more or less satisfaction for the individual, but how does this relate to the whole society? In this way we can start to think of society as not only a collection of individuals but as a whole unit, a more sociological concept. Social Quality should be seen as relating not just to individuals but to their environments as well.

In order to get at some of these factors we need to ask questions not just about individual needs and satisfaction, but how individuals perceive society. This has been started already in the Quality of Life research, where Nauenburg for example looked at whether perception of strong inequalities or ethnic divisions detracted from a good society (Nauenburg, 2004). The problem is that these kinds of questions are seldom asked. Furthermore, it is not always appropriate to mix subjective and objective data in one model.

In order to determine what makes the “good society” we would need to define what we mean by the “good society”. Durkheim would have been able to answer that question and to point out measures for defining the good society. However, the good society can vary according to different social groups and perspectives. Good for whom? Esping Andersen for example argues that we

should measure our societies by how good they are for children (Esping-Andersen et al., 2002). We could point to low suicide, low crime, adequate care for children and elderly, low homelessness and so on.

### 3. CONCLUSIONS

In this paper we have argued that Social Quality is a better concept than Quality of Life for developing social theory. Both perspectives go beyond economic measures of well-being, but Social Quality embodies a social as well as an individual dimension for understanding subjective and objective well-being. Furthermore, Social Quality brings in the aspect of agency the role of human capability in understanding Quality of Life. Social

Quality also helps us to bring together subjective and objective criteria for measuring the quality of society. Therefore, we have argued that it represents a better foundation for developing understanding of work and care in cross-cultural perspective.

However, there are still a number of weaknesses and limitations of this perspective that we would need to think about further.

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**WORK ORIENTATIONS, HOUSEHOLD'S  
CAPABILITIES AND 'CONSTRAINED CHOICE':  
DECISIONS AROUND THE ORGANISATION OF  
TIME, CARE AND EMPLOYMENT**

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## 1. INTRODUCTION

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Conceptually this chapter will focus on household decision making in relation to caring and fertility decisions from a cross-national comparative perspective (O'Reilly 2006, Haas et al. 2006). By critically engaging with the 'preference theory' (Hakim) and the 'capabilities approach' (Sen 1992; Nussbaum 2003) with their contrasting emphasis on choice and constraints, respectively, we will advance the concept of 'constrained choice' (Folbre 1994). The approach that we are developing will be looking at the complex interdependencies between structural constraints and the ability of agents to actively engage with their environment. Further our starting point here is that observable tendencies can only be understood as the outcome of the working of a complex set of mechanisms (both abstract and concrete) that are differently combined and to different effects in different contexts and that are also evolving and co-shaping each other over time.

More specifically we will draw on the work on transitional labour markets to examine changes of employment at various points in the lifecycle (Schmid 2002; O'Reilly et al. 2001 O'Reilly 2003; Giddens 2007). The originality and aim of this research is to focus on the neglected analysis of links between labour markets and household structures related to caring

and employment in different countries and amongst different economic groups (Crompton 2006). From this analysis we hope to contribute to understanding how potential and current employees' choices can be understood in terms of individual's preferences, societal norms and realised functionings in relation to transitions around families and work.

We analyse these aspects to assess the real value of Social Quality provided by existing welfare regimes and policies. This aims to allow us to relate structures at the macro-level to the values, cultures and practices of households, to analyse economic and social trends as well as policies in Europe and in the New Member States and to look at their relationship to empirical arrangements of work and care. In this way we intend to weave our conceptual and empirical work with other work packages. Further, while our focus throughout the chapter is in developing an approach that takes into consideration both structural constraints and the availability of choice and preferences we will first address the literature that focuses primarily on 'work orientations' before moving to a discussion of household 'capabilities'. At the end of the chapter we will make some suggestions about the operationalisation of the notion of constrained choice in the design of the empirical work for this project.

## 2. 'WORK ORIENTATIONS' AND THE 'PREFERENCE THEORY'

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There is a bulk of literature concerned with the study of 'work orientations' (among many others, e.g. Hakim 1991; Crompton & Harris 1998; Svallfors et al. 2001; Walsh 1999; Fagan 2001; Hult & Svallfors 2002; Charles & James 2003; Doorewaard et al. 2004; Kan 2005; Walters 2005). This literature is highly critical of sociologists' traditional focus on structural constraints as determinants of behaviour, at the expense of agency and individual choice. Among the

currently most debated works in this area is Hakim's 'preference theory', that focuses on women's preferences for specific arrangements of work and care as central determinants of their work behaviour (Hakim 2000; 2002; and her earlier accounts on women's heterogeneous work orientations, e.g. Hakim 1991; 1996). Hakim suggests that women's differential involvement in paid work is the outcome of the choices made by different 'types' of

women<sup>1</sup>. She thus uses ‘work orientations’ synonymously with ‘choice’, arguing, for instance, that female part-timers have ‘chosen’ to be home-centred, while women working full-time have a ‘normative commitment to work as a central life interest’ (Hakim 1996: 107). Her voluntarist approach has been criticised for underplaying the constrained context, within which women’s preferences for particular lifestyles are formed (e.g. Ginn et al. 1996; Crompton & Harris 1998; Crompton & Harris 1999; Procter & Padfield 1999; McRae 2003). Emphasising the interplay between individual preferences and contextual factors, Crompton and Harris (1998) argue that women’s employment behaviour is a reflection of the way in which they actively construct their work-life biographies in the context of a structure of opportunities and constraints. They stress that ‘preferences may *shape* choices, but they do not, contrary to Hakim’s assertions, *determine* them’ (Crompton & Harris 1998: 131).

Hakim’s work features very prominently is the ongoing debate about *women’s orientations*, but it is important to note that there is a long tradition in social science research on people’s work orientation. The ‘orientations debate’ around Goldthorpe et al.’s study on the ‘affluent worker’ (Goldthorpe et al. 1968) produced a wealth of literature on *men’s work orientations*, showing that not all men are work-centred in the way that Hakim claims<sup>2</sup>. Goldthorpe et al. differentiate between *instrumental and expressive orientations to*

*work*, where an expressive orientation to work implies that workers view their paid work as their *central life interest*, as their main arena for self-realisation and main source of satisfaction. Those with instrumental orientations, by contrast, find their self-realisation and satisfaction outside the world of paid work and for this reason have a low non-financial commitment to work. Moreover, they tend to be satisfied with objectively unsatisfactory employment – similar to Hakim’s part-time workers depicted as ‘grateful slaves’ (1991). Given that the explanation for this ‘satisfaction paradox’ was found in workers’ orientations to work rather than in their experience of work itself, Goldthorpe et al. already argued that ‘orientations to work’ should be considered as an important independent variable in explaining job choice and work behaviour. The ‘orientations debate’ that was triggered by this bears much similarity to the ongoing debate surrounding Hakim’s preference theory. Goldthorpe et al. developed their view that workers have orientations to work that they hold prior to the exposure to the workplace and that shape their behaviour, in critique of the over-determined assumptions of the 1960s industrial sociology (e.g. Blauner 1964), while their critics stressed the impact of job and workplace characteristics on workers’ personality and work values (e.g. Kohn & Schooler 1983; Hackman & Oldham 1976; Mortimer & Lorence 1979).

Hakim distinguishes between work-centred, home-centred and adaptive women, depending on their choices between market work and family work. Her concept of ‘lifestyle preferences’ has been operationalised differently. In studies aimed to test the main tenets of her theory use is often made of attitudinal items as proxies of women’s preferences (e.g. Knudsen & Waerness 2001; McRae 2003; Crompton & Lyonette 2005; Kan 2005). These include women’s beliefs about desirable gender roles and the consequences of female/maternal employment (e.g. for women’s independence, the household income as well

<sup>1</sup> Hakim (1991; 1996; 1995) distinguishes between two types of working women, the ‘committed’ who give priority to their full-time employment careers, on the one hand, and the ‘uncommitted’ who give priority to their domestic responsibilities and therefore work part-time, on the other. Hakim (2000) also includes non-working women in a typology of ‘types’ distinguishing between ‘home-centred’, ‘adaptive’ and ‘work-centred’ women.

<sup>2</sup> She states that, whereas men in general are work-centred, women are more heterogeneous in their work-life orientations and choices: some prefer to work, others to stay at home and about 50% prefer to combine work and family life.

as its potentially negative effects on child well-being and family functioning). Hakim (2000; 2003) criticizes the use of such attitudinal questions to measure preferences, and contends that while approval to public beliefs are often volatile, lifestyle preferences – particularly in regard to appropriate sex roles – are ‘carefully considered and stable’ (2000:75) and ‘strongly correlated with behaviour’ (2000:77). Yet, as surveys rarely ask people about their personal lifestyle preferences, research is often confined to use data on the approval for selected attitude statements. In her recent work (Hakim 2002, 2003), Hakim describes her three types of orientation as follows: *work-centred* people fit their family life around paid work, rather than the other way around. The *home-centred*, by contrast, give priority to family life and are held to avoid paid work except for when it is financially necessary. The residual category involves all people who do not give a fixed priority to either to paid work or to family life (adaptive group). This definition is operationalised as follows: home-centred women are those who prefer a home life to market work and therefore a *gender traditional organisation of family life with complete role separation*<sup>3</sup>, while work-centred women are identified as those who are committed to their careers *and*, for this reason, prefer the egalitarian model of the family<sup>4</sup>. Finally, adaptive women are defined as those who want to perform some paid

work but do not aim for a career. This way of operationalising lifestyle preferences is strongly focused on women’s choices and is thus less useful for measuring men’s preferences (Hakim 2002: 442). According to Hakim, home-centred men would prefer an at-home role. However, as argued by Charles and James (2003), while among women, home-centeredness is often associated with the (preferred) withdrawal from the workforce when there are young children to care for, among men ‘home-centeredness’ may also take the form of providing for their families by engaging in full-time work.

The term ‘work orientation’ is often used to refer to ‘*job values*’ or ‘job attribute preferences’, i.e. individual’s beliefs about the desirability of various work features (Johnson 2001; 2005). A frequently used dichotomy is between intrinsic and extrinsic orientations to work, representing individuals’ tendencies to value specific types of work rewards (Herzberg et al. 1959; Saleh & Pasricha 1975)<sup>5</sup>. While individuals high in intrinsic orientation (also referred to as expressive orientation) value work features that are inherent in the job itself such as the opportunity to use and further develop one’s abilities at work, individuals high in extrinsic orientation (also called instrumental orientation), primarily value the instrumental resources from work such as income, job security and promotion opportunities. Doorewald et al. (2004) add another type of work orientation, namely the people orientation which is concerned with social factors involved in the job regarding individual recognition and the quality of social relationships at the workplace. Contrary, to Hakim’s lifestyle preferences, work orientations conceptualised as the extent to which individuals value monetary or intrinsic job rewards can be operationalised in a gender neutral way.

<sup>3</sup> The question on gender role preferences reads: ‘People talk about the changing roles of husband and wife in the family. Here are three kinds of family. Which of them corresponds best with *your* ideas about the family? A) A family where the two partners each have an equally demanding job and where housework and the care of the children are shared equally between them. B) A family where the wife has a less demanding job than her husband and where she does the larger share of housework and caring for the children. C) A family where only the husband has a job and the wife runs the home. D) None of these three cases.’

<sup>4</sup> Work-centeredness is defined as a combination of adopting an identity as a primary earner and to have a non-financial employment commitment (would continue working in the absence of financial need).

<sup>5</sup> Intrinsic work rewards refer to gratifications derived from the work tasks themselves (e.g. interest, challenge and responsibility); extrinsic rewards are external to the task experience (e.g. pay, security and prestige).

Apart from work orientation defined as job values, there is a related but theoretically distinct concept, namely *work centrality* (also called *work involvement*) which refers to individuals' beliefs regarding the degree of importance that gainful employment plays in their lives (Kanungo 1982; Paullay et al. 1994) and stems from Dubin's (1956) formulation of '*work as a central life interest*'. This is distinguished from *job involvement*, defined as the 'degree to which one is cognitively preoccupied with, engaged in, and concerned with one's *present job*' (Paullay et al. 1994: 224). Apart from work orientations, either defined in terms of work centrality or in terms of work values, also *attitudes* have been defined as a predisposition to behave in a certain way. Fishbein and Ajzen lay out the theory of reasoned action (Fishbein & Ajzen 1975), which posits that individual behaviour is driven by *behavioural intentions*, where behavioural intentions are a function of an individual's attitude toward the behaviour and subjective norms surrounding the performance of the behaviour. An individual's attitude toward the behaviour is determined through an assessment of one's beliefs regarding the consequences arising from the behaviour and an evaluation of the desirability of these consequences. Subjective norm is defined as an individual's perception of how they should behave in order to conform to the expectations of the people important to the individual. The shortcoming of this theory is its implicit assumption that intentions to act will actually put into practice in disregard of constraints that often limit the freedom to act. The theory of planned behaviour (Ajzen 1991) attempts to resolve this, defining behavioural intentions as a function of an individual's attitude toward and the subjective norms surrounding the performance of the behaviour but also of the individual's perception of the ease with which the behaviour can be performed.

## 2.1. AN ATTEMPT TO DEFINE 'ORIENTATIONS TO WORK AND CARE' AND RELATED CONCEPTS

There are a number of qualitative studies on 'orientations to work and family' (e.g. Lewis et al. 1999; Oorange 2002). Yet, they do not attempt a substantive definition of the concept. Lewis et al. (1999) as well as Oorange (2002) set out to examine young people's *orientations to family and work*. The former broadly define these as their *anticipated future family and work arrangements* (method: focus groups). Similarly, Oorange addresses the question of how law and business students about to start their professional careers *define their life plans for work and family life as well as for leisure* (method; in-depth interviews). The questions were focused on how respondents defined each life domain, as well as the interrelationships between them. Among the main outcomes was a typology of orientations to work-family life. The types were a) the *orientation toward a modified form of providing* (identify strongly with having careers and providing financial security for their families, but also value the expressive aspects of family life, such as having close relationships with their future spouses and children), b) *the strong egalitarian orientation toward work and family life* (plan to pursue careers and have families and also seek to find spouses who would equitably share domestic and care work), c) *the weak egalitarian orientation toward work and family life* (plan to shift into more tradition work-care arrangements during the times when young children are present) and d) the *strong form of egalitarianism with the possibility of remaining single and cultivating family relationships with close friends or relatives*. Oorange concludes that young people seem to take a pragmatic rather than ideological approach toward resolving issues surrounding work and family life, because they are aware of the contingency of their future work and family lives and the barriers towards the realisation of any ideals they may have.

Gilbert and colleagues (Gilbert et al. 1991) developed a self-report instrument designed to assess adolescents' and young adults' desires for combining the roles of work and family, namely the *Orientation to Occupational-Family Integration Scale (OOFI)*, consisting of three separate scales that reflect three types of orientation: the male-traditional (MTR); the female-traditional (FTR); and the male and female role-sharing (RS). Items on the MTR and FTR scales reflect the view that although both women and men may be employed, the woman is primarily responsible for the home and children and the man is primarily responsible for financial provision. Endorsement of items on the male and female role-sharing scale reflects the desire for an active integration of work and domestic roles for both the individual responding and their partner<sup>6</sup>.

Some researchers investigate orientation toward work or family by evaluating the salience of these roles (for role salience theory, see Nevill & Super 1986). In two recent studies Cinamon and Rich (2002a; 2002b) examine respondents' *simultaneous* perceptions of importance of work and family roles. To assess participants' attribution of

importance to work and family roles use was made of Amatea et al.'s (1986) *Life Role Salience Scale (LRSS)*, which measures attribution of importance to four roles: work, spousal, parental, and housework. Role salience is determined by examining role commitment and role values. A 10-item subscale taps each of the four roles and comprises five items that reflect commitment to the role (e.g. 'I expect to and will invest whatever is necessary to advance in my career') and five items that reflect the value attributed to the role (e.g. 'The goal of my life is to have an interesting career'). Three distinct groups of participants were identified: (a) those who assign high importance to both the work role and the family role (the 'dual' profile); (b) those who ascribe high importance to the work role and low importance to the family role (the 'work profile'); and (c) those who attribute high importance to the family role and low importance to the work role (the 'family' profile). Membership in the different profiles is associated with number of hours spent at work and at home and the level of work-family conflict, suggesting that an important source of such conflict lies in one's hierarchy of importance attributions to life roles.

People learn, long before they enter the world of work, what 'work is about'. Whether it is a necessary evil, i.e. merely a means to make money or whether it is potentially a means to find fulfilment. Based on such *attributed meanings* that are the result of ongoing processes of learning and socialisation, we value certain work rewards more than others (job attribute preferences) and against this backdrop 'enact' particular behaviours at the work place. Such attributed meaning influence what *they* consider the most important job aspects (e.g. high income, job security, nice co-workers), thus their choice of occupation, the nature of their work motivation and the level of extensive and intensive work effort. Work motives range from economic necessity, over learning new things, meeting people or being independent. Similarly, early socialisation is likely to

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<sup>6</sup> Participants are given the following instruction: "Currently our society is experiencing changes. As a result of these changes there are many different possibilities for handling work and family roles as an adult. We'd like to know how much you have thought about each possibility, at this time in your life, and how much you see yourself committed to choosing this possibility for yourself." On a 5-point scale that ranges from "not at all" to "very much," they are asked to indicate how much they have thought about and how committed they are at the present time to the option described. Sample items include: "I see my spouse as working full-time and being the major financial provider;" and "I see myself working part-time and taking primary responsibility for maintaining the household." (FTR); "I see my spouse and I both working full-time and sharing the financial responsibility continuously throughout our marriage" and "I see myself and my spouse both employed full-time and to a great extent sharing the day to day responsibilities for maintaining the household, like food shopping, cooking, laundry, and routine money management." (RS).

contribute to gender differences in role salience: when young men are raised to adopt the provider role more than young women, it is likely that more men than women assign high levels of importance to the work role. This is where we may locate ‘orientations’, namely in close proximity to individuals’ value system. *We may define orientations to work and family as the meaning that individuals attach to the two spheres – to paid work and family life – based on their value system.*

More generally, that is when the non-market sphere is extended to include leisure, we may call these individuals’ *work-life orientations or work-life priorities*, which may be measured by the role and *relative importance* and that individuals assign to paid work, their family life and leisure. Based on such work-life priorities, people may formulate their planned or enacted *work-life strategies* (Wallace 2002), which can be defined as *constrained preferences* for certain work-lifestyles (as opposed to work-life ideals, which are theoretically formed in the abstract). It seems important to differentiate between people’s a) *orientations* to work and family, b) their preferred work-family *strategies* and finally c) their work-family choices/behaviour. Jensen and colleagues (Jensen et al. 1985) suggest that it is possible to predict young women’s preferences for parenting and work from their perceptions of the rewards and costs involved in each of these activities. However, the reward-cost perceptions of parenting are better predictors of whether young women have a preference for the career choice over parenting than the reward-cost perception of work<sup>7</sup>.

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<sup>7</sup>The following two items were rated from "very much like me" up to "definitely not me" on a 1-7 scale. 1. 'I desire to be a parent and not work outside the home'. 2. 'I desire not to be a parent but to work full-time.'

## 2.2. GENDER DIFFERENCES IN WORK VALUES AND GENDER ROLE ATTITUDES

There are some authors who support the idea that women, as a result of their socialization, place a greater emphasis on family roles than men (Dodd-McCue & Wright 1996; Jensen et al. 1985), which in turn may result in women placing less importance on their work roles.

‘Whether and to what extent men and women hold differing preferences for particular job attributes remains the subject of debate, with a sizable number of empirical studies producing conflicting results’ (Tolbert & Moen 1998). Lueptow’s overview of research on gender and work orientations (Lueptow 1997) suggests that in general, men tend to have more of a ‘money’ orientation than women do, whereas women are more ‘people oriented, i.e. concerned with relational rewards from work. In other words, when asked to judge the importance of different job characteristics, men often mention job security and good pay as essential in a job while women are more likely to choose good relations with supervisors and colleagues. Similar findings are reported by Gallie et al. (1998) and more recently by Doorewald et al. (2004). Tolbert and Moen (1998) who focus on changes in job values over the life cycle, by contrast, find that gender differences are limited. Johnson (2001; 2005), suggest that labour market changes may bring men’s and women’s job values closer together. This receives empirical support from U.S. based research, suggesting that although young men have historically placed more emphasis on extrinsic work rewards and less importance to intrinsic rewards than young women, in recent cohorts, the gender difference in valuing extrinsic job rewards diminished (Marini et al. 1996; Mortimer et al. 1996; Johnson & Mortimer 2000).

Women’s attitudes towards female employment tend to be more modern than men’s (Knudsen & Waerness 2001;

Crompton et al. 2005). Other factors that have been found to be associated with more favourable attitudes toward female employment include younger age, better education, a mother who was gainfully employed during ones childhood/adolescence, being in employment and practising a gender egalitarian working arrangement (Knudsen & Waerness 2001; Crompton & Lyonette 2005; Alwin et al. 1992). Those women who work and also their husbands are less likely to think that maternal employment is to the detriment of young children (Alwin 1992).

### 2.3. COUNTRY-DIFFERENCES IN WORK AND GENDER ROLE ATTITUDES

The first larger scale comparative work on people's attitudes towards women's employment emerged in the 1990s following the release of the first ISSP Gender role module in 1988. Drawing on these data Scott (1990) compared Great Britain with the United States, Ireland, Hungary and the Netherlands and concluded that national differences in the extent that people agree with the notion that pre-school children suffer when their mothers work are in part due to differences in the institutional setup (e.g. availability of childcare). Using the same data set, Alwin et al. (1992) looked at the extent to which respondents approve of female employment in different life course circumstances<sup>8</sup> in Britain, West Germany and the US. Yet, as the authors themselves criticise in a later article (Braun et al. 1994), this research design fails to distinguish the different reasons for why women are expected to work (e.g. claim that also women should be given the opportunity for self-fulfilment in the world of paid work or the simple necessity for two incomes to

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<sup>8</sup> Do you think that women should work outside the home full-time, part-time or not at all under these circumstances: a) after marrying and before there are children, b) when there is a child under school age, c) after the youngest child starts school and d) after the children leave home?

support a family). In this later article, that compares the Western with the formerly socialist Eastern part of Germany, the authors make use of a set items regarding people's beliefs about the consequences of maternal employment for young children and the family, ideological reasoning about women's proper occupational role, the necessity of a double income and the importance of work as a basis for female independence. They remind us that some of these dimensions relate closely to objective circumstances.

So are individuals' beliefs about potential negative effects of maternal employment likely to be affected by the availability and quality of non-maternal childcare options. Moreover, also the question on whether or not respondents think that women *should* contribute to the household income is ambiguous, either measuring feminist claims or simple financial necessity. This needs to be taken into account in interpreting country differences in how people respond to these questions. Brown et al. suggest that to better understand women's gender-role attitudes it may help to look at their work values<sup>9</sup> and life priorities<sup>10</sup>. Contrary to what one might expect, they find that public opinion in East Germany is not more committed ideologically to gender-role egalitarianism and conclude that '*Socialism had surprisingly little impact on these ideological values, despite a deliberate commitment to changing traditional gender roles*' (Brown et al.: 38). Nevertheless, although there is rather little difference in values about gender-roles; the two parts of Germany are far apart where attitudes reflect the different objective

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<sup>9</sup> A job is just a way of earning money – no more. I would enjoy having a paid job even if I did not need the money. Work is a person's most important activity. They find that the difference in orientation to work in the two Germanys is a crucial factor in explaining gender-role attitudinal differences, especially for those items which differentiate between the importance of work for economic reasons or for women's independence.

<sup>10</sup> They consider importance ratings for the two areas of life: 'one's own family and children' and 'career work'.



situations<sup>11</sup>. One possible reason for the persistence of traditional gender role ideologies in the East is the absence of a feminist movement and the fact that women did not have to fight for their rights, which were essentially effected by governmental decree. Then they enlarged their sample of countries to include the other seven countries that were part of the ISSP to find that Hungarians are considerably more traditional than any other country when it comes to ideology concerning the woman's role<sup>12</sup>. Thus, there is little commonality due to sharing similar economic and political systems during the state-socialist era in Eastern Europe. A similar conclusion was reached by others: Although the majority of women in ECE countries worked full-time under communism the equality in labour market participation seems to co-exist with rather conservative conceptions of family and gender roles (Crompton et al. 2005; Robila & Krishnakumar 2004; Haas et al. 2006).

However, there is no clear East-West divide except for the rather high emphasis placed in the less prosperous post-socialist countries on the need for a double income. As argued by Braun et al. (1994), in the East 'economic necessity' prevails as a work motive for women, while self-actualisation in a job has no higher importance in the former socialist than in the Western countries. Indeed, they suggest that if economic hardship is reduced in the East, then East-

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<sup>11</sup> For instance, there is a far greater difference with respect to the question of whether 'both the husband and the wife should contribute to the household income' and with regard to the potential negative effects of maternal employment given the much better childcare infrastructure in Eastern Germany than the questions of whether having a job is seen as the 'best way for a woman to be an independent person'. There is no difference at all between East and West Germans in their belief that a woman should give precedence to her husband's career over her own.

<sup>12</sup> Overall, West Germany and Austria were more traditional in their gender-role attitudes than the Anglo-Saxon countries, East Germany and the Netherlands. The Hungarians, despite their high-quality public childcare, were far more sceptical, like the West Germans) and remained committed to the traditional maternal role.

West gender-role attitudinal differences may vanish. Today, attitudes are rather modern in Slovenia, while this is much less the case than in Hungary, the Czech Republic, Bulgaria and Romania (Haas et al. 2006).

Crompton and her colleagues (Crompton et al. 2005) update an analysis initially carried out using the ISSP 1994 'Family and Gender Roles' module (Crompton & Harris 1999), now drawing upon the ISSP 2002. The 1994 analysis demonstrated considerable variations in gender role attitudes<sup>13</sup> between the three countries, with Norway the most gender liberal, and the Czech Republic the least liberal and most stereotypical in respect of gender roles, with British attitudes lying between these two 'extreme cases'. The same questions were asked, and the same indexes constructed, for the 2002 data. In 1994, for men and women, gender role attitudes were most conservative in the Czech Republic and most liberal in Norway and Britain lay in between the two. In 2002, the same pattern emerged.

#### **2.4. COUNTRY DIFFERENCES, HISTORICAL AND CULTURAL FACTORS, SECULARIZATION, PREFERENCES**

We already know from ISSP (2002) and from ESS (2004), and from several other research results, that orientations to work and care are different in Europe of 25 (see figures and tables in Appendix). Thus, besides mapping them it is important to identify the main theories and lines of research that have been trying to explain the diversity of orientations and relating them to several variables. Thus, our goal is also accessing the interplay between structural, institutional and cultural *determinants of orientations* (Haas, 2005)

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<sup>13</sup> The authors computed a gender role attitude index from responses to the following three statements: A job is all right, but what most women really want is a home and children. A man's job is to earn the money, a woman's job is to look after the home and family. It is not good if the man stays at home and cares for the children and the woman goes out to work.

and trying to find the more relevant for *explaining country diversity*.

Therborn, in a perspective of the twentieth century, argues that crediting urbanisation and industrialisation alone with the role of providing the principal motor for the family changes observed in the last hundred years does not seem sufficient to understand these changes. Therborn takes the example of the pioneering role played by Scandinavian countries in certain transformations that, with regard to the family, are today considered as the “norm” in other European countries<sup>14</sup> – gender equality in marriage, the freedom to choose a partner, the greater value given to individual rights and a secular vision of conjugality. In accordance with this, he tends to give pre-eminence to political, cultural and ideological factors such as strong secularisation to explain the differences in the European family system that can be observed between countries (Therborn, 2004: 78). The greater or lesser influence of secularisation on topics associated with the family, the existence or absence of policies on gender equality or sexuality is also a factor to be taken into account in explaining these differences.

These recent results actualise other critiques regarding preference’s theory like the ones made by a group of British sociologists (Ginn, et al., 1996) that stated, among other issues, the commitment and orientation to work of British women at the same time they shed light over issues like childcare costs and availability and relating them to part-time’s job “choice” and “satisfaction” with it. More recent results

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<sup>14</sup> The Swedish author explains that when some of the basic legislation on marriage, the family and women's rights was applied in Scandinavian countries at the very beginning of the 20th century, a large part of the working population was still engaged in agriculture (Therborn, 2004: 77). Accordingly, he tends to question the acknowledgment of urbanisation and industrialisation, made in particular by W. Goode, as the fundamental factors in the change in family structures in the world (Goode, 1963).

actualize and reinforce (Torres, Haas, Steiber and Brites, 2007, Torres, Mendes and Lapa, forthcoming) not only for Britain but for all Europe, these critiques. In fact, from different sources as the results from European Social Survey 2002 (Figure 2.1, see appendix), ESS 2004 or Eurobarometer 2003 (Figure 2.2, Tables 2.1, 2.2, see appendix) showed very clearly the attachment or commitment of women and mothers to work as well as the perception of difficulties raised by part-time jobs (Tables 2.3, 2.4, see appendix). It is also important to stress that contrary to Hakim’s assumptions the results of EB 2003 show that mothers of pre-school and school children don’t reveal less commitment to their jobs than other women or men and fathers.

It is also important to stress that several authors conclude for the majority of the countries that modern attitudes tend to be assumed by women more than men, by younger than by older, by the more educated (also contradicting Hakim’s proposals) and the less religious.

## **2.5. INVESTIGATING THE PREDICTIVE VALUE OF ORIENTATIONS TO WORK AND CARE**

To test Hakim’s claim that female work behaviour is a reflection of their work-lifestyle preferences (Hakim 2000), a number of studies investigated the predictive value of attitudes for household practices with regard to the gender division of work and care responsibilities. In a recent study, Crompton and Lyonette (2005), looked at gender role attitudes to mother’s employment and to men’s involvement in household tasks<sup>15</sup> as

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<sup>15</sup> The items in the ISSP questionnaire are: A working mother can establish just as warm and secure a relationship with her children as a mother who does not work; A pre-school child is likely to suffer if his or her mother works; Family life suffers if a woman goes out to work; Work is alright, but what a woman really wants is a home and family; A man’s job is to earn money, a woman’s job is to look after the home and family. ‘Men ought to do a larger share of household

potential predictors of couples' work hours strategies. They argued that if Hakim's assertions were correct, such attitudinal factors should turn out as major determinants of women's employment behaviour. Yet, based on ISSP 2002 data, pooled across six European countries, they find that although non-working women tend to have more traditional attitudes, there is no significant difference in attitudes between part- and full-time working women. From this finding, they conclude that apparently *'structural' factors are at least as important, if not more important, than 'attitudinal' factors in shaping the working arrangements of couples* (Crompton & Lyonette 2005). A separate analysis that focused on Norway, where women are assumed to have more choice over the extent of their paid work involvement (availability of part-time options and childcare), even revealed a zero order relationship between attitudes to women's employment and their work behaviour. However, while the absence of statistical associations between women's employment decisions and their attitudes to gender role suggests that such attitudes do not play a major role, it is also clear that for a more rigorous analysis of the impact of attitudes on such decisions longitudinal data are required. *'Without current longitudinal data, it is impossible to conclusively determine whether attitudes affect work behaviour or whether work behaviour, perhaps as a consequence of structural constraints, affects attitudes* (Crompton & Lyonette 2005: 612).

Drawing on the BHPS, Himmelweit and Sigala (2003) showed working mothers who believe that their pre-school children are suffering because of their paid work involvement, are more likely to change their attitudes towards maternal employment than to change their behaviour over a two-year period. Their findings thus suggest that attitudes affect work behaviour and vice versa, but that work behaviour has a greater impact than attitudes. Nevertheless, although it is widely acknowledged that attitudes and

behaviour adapt to each other in a process of positive feedback (Himmelweit and Sigala 2003: 23), researchers continue to look at the cross-sectional association between attitudes towards work and motherhood in order to test their 'predictive value' for behavioural outcomes. For instance, Marks and Houston (2002) show that employed mothers can be distinguished from non-working mothers on the basis of three attitude scales. The strongest predictors are work commitment, personal negative attitudes toward motherhood (agreement with the view that motherhood is a boring, exhausting, stressful and socially isolating experience), followed by disagreement with the idea that mothers should be the primary carers of their children as they are naturally equipped to do so. Finally, the more women agreed that children might benefit from alternative child-care the more likely they were to work. Full-timers are further distinguished from part-timers in that the former have a significantly stronger work commitment than their part-time working counterparts and are more likely to stress the negative aspects of motherhood.

Drawing on the ISSP 1994 Crompton and Harris (1999) find that 'liberal' gender role attitudes are associated with a 'less traditional' division of domestic labour. However, this link between attitudes and behaviour appears to have been weakening by 2002. In Britain and Norway, the link between gender role attitudes and the 'traditional' or 'non-traditional' allocation of household tasks that had been demonstrated in 1994 is no longer significant (Crompton et al. 2005). Finally, there are a range of studies that show that people are often found in situations that do not reflect the type of household organisation they would prefer: women's employment behaviour is often at odds with their 'orientations' (Crompton & Harris 1998). There are working mothers who would, owing to a preference for a traditional gender division of labour and for maternal care of small children, not choose to work if they had the option, i.e. if they could afford not to work. And there are non-working women who are out of the labour force not by

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work that they do now'; 'Men ought to do a larger share of childcare than they do now.'

choice but because they are unable to find a job or adequate childcare.

As explained in Chapter 1, the Social Quality perspective tries to take into account agency and decision-making as well as structural constraints when looking at how households manage work and care in their daily lives. One important way in

which this can be conceptualised is through the so-called “Capabilities Approach” to which we turn next. However, this needs to be situated in the context of social justice and inequality, something which has not been analysed sociologically, but which we try to incorporate in the next section.

### 3. THEORETICALLY SITUATING THE CAPABILITIES APPROACH

The main contribution of the Capabilities Approach (CA) has been to propose an alternative way to assess inequality and the opportunities actors have to realize life goals that affect the quality of their lives. Amartya Sen and Martha Nussbaum’s work has its origin in a critique of traditional utilitarian or ‘welfarist’ approaches in economics (Nussbaum and Sen 1993). Its main contribution has been to challenge studies of economic inequality focused on the structural differences in income or commodity holdings (Sen 2000). The CA incorporates other dimensions of well-being and gives more

emphasis to the role of actors (Sen 1992). Firstly, it differentiates means from ends, stressing that an increase in income does not necessarily bring an increase in other dimensions. Secondly, it emphasizes the notion of human differences indicating that people and households vary in their faculty to value as well as convert commodities into ‘well-being’ (Robeyns 2005). It proposes that inequality should be assessed not on the basis of commodity holdings, but on the effective capability people have to choose a ‘way of life’ they have reasons to value.

#### Definition of key concepts:

- **Commodities** are means to achieve other ends; e.g.: income or basic goods - they are not ends in themselves (Sen 2000).
- **Functionings** are ends or achievements in themselves: ‘beings’ or ‘doings’ in life such as being healthy, living healthily, being educated or enjoying a decent life.
- A **‘way of life’** is a combination of specific set of ‘beings’ and ‘doings’ in life. Functionings grouped into different combinations.
- **Freedom** is to choose a ‘way of life’ that a person values/ prefers (Sen, 1999).
- **Capabilities** are the various combinations of functionings/ ‘ways of life’ available from which a person can choose one particular group.

Regarding the distinction between means and ends, the CA suggests three main concepts: commodities, functionings and capabilities. **Commodities** are understood as means to achieve other ends, such as income or basic goods, which are not ends in themselves but means for achieving other ends (Sen 2000). **Functionings** are ends or achievements in themselves; in Sen’s words, functionings are ‘beings’ or ‘doings’ in life such as being

healthy, living healthily, being educated or enjoying a decent life (Sen 2000). Everything is not equally possible in life; consequently functionings can be grouped in different combinations, each of which can be understood as a different and possible ‘way of life’. Finally, **capabilities** are the various combinations of functionings available from which a person can choose one particular group (Sen 2000). In other words, capabilities are the

various 'ways of life' from which a person can choose one.

The CA proposes that inequality should be assessed based on the capability people have to enjoy different 'ways of life'. Inequality is here related to opportunity but in a very different sense to that of libertarians. Even though it is possible to study disparities in commodities and functionings (such as income or level of education), the CA suggests studying inequality from the differences in capabilities to achieve ends. *'In this view, individual claims are to be assessed, not only by income, resources or primary goods the persons respectively have, nor only with reference to the utilities they enjoy, but in terms of the freedoms they actually have to choose between different ways of living they can have reason to value'* (Sen 2000: 65). Based on this perspective, a policy towards social justice should be oriented towards enlarging people's capabilities by endowing them with adequate, fair and efficient resources, *'providing individuals with effective means to develop'* (Salais and Villeneuve 2004). It is in this context that inequality is related to the notion of freedom; freedom to choose a 'way of life' that a person has reason to value (Sen 1999).

Sociological approaches of inequality have tended to focus on a more structuralist perspective, emphasizing the systematic differences in life chances among groups of people, which are the unintended result of social processes and social relationships (Crompton 1998). These approaches more commonly relate inequality to the notions of social class, status group or social stratification. The variety of perspectives and even definitions of social class tend to generate significant confusion (Crompton 1998; Wright 2005a). The concept of class mainly derives from Marxist thought, while status group is associated to Weber's heritage. Stratum and stratification tend to be used as general terms that use both

previous categories (Crompton 1998; Runciman 1967; Wright 2005c).

Erik Olin Wright (2005a) helps to clarify this confusion by classifying the approaches based on what he considers the six basic questions of class analysis: Distributional location, Subjectively salient group, Life chances, Antagonistic conflicts, Historical variation, and Emancipation in these debates. This classification shows that 'life chances' is always a major issue of concern but linked in different ways with other questions. 'Life chances' are normally related to the possibility of opting for a particular 'life style', in the case of Weber's influence, or as the chances associated to the distribution of resources, in the case of Marxist tradition. The CA proposition could be incorporated in the analysis of 'life chances', understood as opportunities in life. In this way, 'life chances' could be interpreted in the same way as the notion of capabilities. 'Life chances' are different because people vary in their capabilities to enjoy a valuable 'way of life', this being a more generalized notion than 'life style'. Three approaches related to 'life chances' are particularly interesting to relate to the CA: the neo-weberian perspective, the analysis of inequality carried out by Pierre Bourdieu, and the so called post-class analysis.

### **Table 2.5. Six primary questions of class analysis**

(extracted from: Wright, 2005b: 182, based on Roche Reyna 2006).

Six basic questions of class analysis:

1. Distributional location: "How are people objectively located in distribution of material inequality?"
2. Subjectively salient group: "What explains how people, individually and collectively, subjectively locate themselves and others within a structure of inequality?"

3. Life chances: “What explains inequalities in life chances and material standards of living?”
4. Antagonistic conflicts: “What social cleavages systematically shape overt conflicts?”
5. Historical variation: “How should we characterize and explain the variations across history in the social organization of inequality?”
6. Emancipation: “What sorts of transformation are needed to eliminate oppression and exploitation within capitalist societies?”

Approaches to class analysis	Anchoring questions					
	1. Distributional location	2. Subjectively salient group	3. Life chances	4. Antagonistic conflicts	5. Historical variation	6. Emancipation
Popular usage	***	*	**	*		
David Grusky (neo-Durkheimian)	**	***	**	*	*	
Jan Pakulski (post-class analysis)	**	***	**	**	**	
Pierre Bourdieu	**	**	***	*		
Richard Breen and John Goldthorpe (neo-Weberian)	**	*	***	*		
Aage Sørensen (rent-based)	**	*	**	***		
Max Weber	*	*	**	*	***	
Erik Olin Wright (neo-Marxist)	*	*	**	**	**	***

- \*\*\* primary anchoring question for the concept of class
- \*\* secondary anchoring question (subordinate to primary anchor)
- \* additional questions relevant to the concept of class, but not central to anchoring the definition

The neo-weberian perspective has focused on studying social mobility, and the extent that social position and the related distributions of rewards are explained by individual effort or performance (Goldthorpe et al. 1987, Goldthorpe 1992, Marshall et al. 1997, Breen 2005). It evaluates the fairness of the social system in terms of economic distribution or meritocracy. In economic terms it assesses the distribution of rewards, usually income, between social classes, rather than the actual capabilities

people have by belonging to a particular class. The meritocratic analysis studies the processes of social mobility as the relation between education or performance, and social class destiny. Although the strength of this approach is to evaluate the meritocratic claim of liberal societies (Wright 2005b), it tends to overlook changes in the social structure. The social class position is operationally defined by the Goldthorpe class schema, which has been criticized for not adapting to changes within the service sector over time, and the

development of lower status jobs in this category (Crompton 1998).

The second approach is the one carried out by Pierre Bourdieu (1984 [1979]). In his understanding of social position, Bourdieu combines the Marxist focus on economic resources as determinant of people's chances, incorporating other sources of inequality in a more Weberian way, such as social and cultural or symbolic capitals. Hence, resources and social relations are considered not just economic, but also forms of cultural and social capital. Paths of social mobility are diverse, and not solely dependent on economic resources, but are also linked to sources of cultural capital. Bourdieu's focus concentrates on life style and the role of education and of cultural or symbolic capital in the reproduction of inequalities.

A key aspect in Bourdieu's analysis is the concept of 'habitus', which has important implications for the CA. 'Habitus' is understood as a system of dispositions to taste or to preferences shared by all the individuals who come from the same background (Bourdieu 1984 [1979]). Classes are for Bourdieu efficient agents of socialization; as a result, their members share dispositions, tastes and lifestyles (Grusky 2001). These systems of disposition to taste produce enduring orientations towards action that tends to reproduce the structure from which they originated (Cockerham et al. 1997).

This has two main consequences for the CA. Firstly it implies that it is difficult to introduce the subjectivity of satisfaction or to only consider people's preferences in order to assess the achievement of capabilities. Secondly, and consequently, it might support defining a list of fundamental entitlements '*independent of the preferences that people happen to have*' since these can be affected by a person's class location (Nussbaum, 2003); an issue we discuss in more detail later in this paper.

The third perspective is the post-class analysis represented by Jan Pakulski (2005). This perspective stresses the historic basis of class differentiation, highlighting the complexity of the current stratification systems. Pakulski suggests that social class is a historical category characteristic of industrial societies, and not necessarily the social category that explains the distribution of chances and social formation, nor identity, nor antagonistic conflict, in current societies. He considers that the complexity of post modern societies has led to the end of class inequality as the main category of differentiation, generating instead complex and hybrid stratification systems. He considers that '*gender, occupational strata and market segments, as well as racial and ethno-specific "underclass" enclaves, are good examples of such hybrid configurations of inequality. If clustering is strong and social strata develop around the complex combination of positions, we are dealing with complex/hybrid stratification*' (Pakulski, 2005: 173). This interest on diverse social categories, understood as complex/hybrid stratification, is to a certain extent similar to Stewart's interest in social group inequalities. Groups might be potentially mobilized when inequalities in life chances or capabilities are poor, and they possess strong social consciousness and identity.

The study of social inequality in a broad sense is related with the distribution of life chances between social categories, commonly related to the notion of social classes or status groups. Life chances, from a narrow point of view have to do with distribution of rewards. However, in a broader sense, they are also linked to social justice more generally. The sociological perspective gives particular attention to how social relations generate systematic, unintended inequalities between social groups, possibly linked to a group's consciousness, identity, and antagonistic conflict. The CA acknowledges the complex processes of individual

preferences and choices. The ‘habitus’ disposition toward action and preferences implies complex processes of production and reproduction of social inequality. One of the strengths and difficulties of the CA is the recognition of **differential preferences**. This challenges assumptions that there are developmental ‘solutions’ for particular groups that are often imposed from outside that group, and which are identified as what is best for them. Instead CA attempts to give more emphasis to agency by acknowledging human diversity and the fact that people have different needs and preferences. However, this approach entails a number of problematic issues related to the operationalisation of these concepts for empirical research.

### **3.1 PROBLEMATIC ISSUES FOR EMPIRICAL RESEARCH RAISED BY THE CAPABILITIES APPROACH**

#### **3.1.1. Differential outcomes: a result of preferences or the constraints of class structures and societal norms?**

Atkinson and Bourguignon (2000) argue that within the CA *‘differences in economic outcomes attributable to differences in preferences must thus be considered essentially as the expression of individual liberty and diversity in society rather than a sign of inequality’*. This is problematic. It implies that everyone has met their preferences. Implicitly this attributes economic outcomes solely to individual’s preferences, as if individuals would choose and act alone in the vacuum without negotiations & constraints (see discussion of Major 1989, 1993 and Sen 1992 later in this paper). Nussbaum (2003: 34) has argued that the focus on individual preferences to this extent is problematic as this can lead to ignoring how *‘unjust background conditions’* have shaped these preferences. In other words: people develop preferences for what they have, are familiar with, or what they know they

can realistically achieve. Additionally, further inequalities arise as a result of differential capacities to convert commodities into well-being (Lipton and Ravallion, 1995). Households with the same income will not necessarily be able to achieve the same levels of satisfaction because of particular differences (Sen, 2000). It is these particular differences we are interested in exploring.

Further, preferences for themselves and those considered suitable at a societal level may not cohere (Daly and Rake 2000, OECD 2001a). What is seen as preferable at a particular phase in the lifecycle can change over time and with reflection of the individuals involved, depending on how their life chances work out. To the extent that we see choices as *constrained*, we need to be able to model what these choices would have been in the absence of constraint (which implies a model of preferences that circumscribes individual’s agency) or a model of ‘just’ (inevitable) or unjust (socially reformable) constraints. We might think in terms of the social determination of respondents’ awareness of constraints and how these vary historically, as well as across societies. For example, in studies of social demography people regularly cite time and money as a ‘constraint’ on their fertility decisions, such that achieved fertility is below desired fertility (MacInnes 2005, DiPrete et al. 2003). However it can also be shown that in absolute terms, potential parents have both more time and money than their more fertile predecessors. What has changed are the objective ‘constraints’ of expanding alternative opportunities to parenthood, which allow potential parents to choose other ‘beings and doings’ hitherto not seen as feasible, but which leave less time and money for children.

Nevertheless, there are two dimensions we can borrow from Sen (1993) to help us address this problem. First, in our study of households decisions around time, care and employment we can try and make links with the qualitative



work in this research programme attempting to identify the negotiation process with the partner. Second, in combination with the quantitative analysis we can identify the constraints posed by both background conditions and feasible solutions (those perceived as possible, understood as normatively acceptable and affordable in their practical realisation<sup>16</sup>). We can use this in combination with the concept of ‘constrained choice’ as used by Folbre (1994) who argues that the critical structures of constrained choice are: *asset distribution* (financial, biological, human capital), *political rules* (specified by statute or contract), *cultural norms* (implicit societal rules) and finally *personal preferences*. These constraints set ‘*certain boundaries of choice*’ (Folbre 1994:51). Negotiations within these constraints will result in a gendered differential in outcomes from conflict resolutions whereby the partner with the weakest breakdown position in the bargaining process (generally the women) gets the less favourable solution (Sen 1992); and secondly allow us to compare similarities and differences in their entitlements (Major 1989 and 1993) thereby helping us to link individual attitudes, at the micro level with realised practices at the meso-level with a macro level institutional framework.

### 3.1.2. Methodological Problems: Achieved functionings & choice

These conceptual problems also create quite substantial issues in relation to operationalisation for empirical analysis (Atkinson and Bourguignon 2000). Robeyns (2000:12) has argued ‘*to gain the academic status of not only being a*

*philosophical theory*’ it is necessary to formalise these concepts empirically and definitively. She argues that a list of key capabilities could provide the basis for citizenship rights (Robeyns, 2005) and as such a measure to evaluate to which extent they have been achieved by individuals, groups and societies. Sen (2004), whilst acknowledging these arguments, is also resistant to defining capabilities in this way, arguing that the very basis of the CA was to go beyond a rights based analysis to focus on agency and individuals’ abilities to realise and practice these rights repeatedly.

One of the main methodological problems arises in relation to the question of whether to focus on capabilities or functionings? (Roche Reyna 2006). Functionings are easier to examine as they can be empirically observed (either directly or indirectly). An examination of capabilities needs to include all available opportunities to an individual and identify those that were not chosen (unobservable facts) (Robeyn 2000). One way around this is to focus on *achieved functionings* as a vector of actual ‘beings’ and ‘doings’. A capability is a combination of potential ‘beings’ and ‘doings’. But it is not obvious how this set should be measured, let alone evaluated. (Robeyns, 2000: 11). “*Refined functionings*” are concrete states, chosen as indicators of people’s life chances. Transition from achieved functionings to capabilities involves processes of **choice**, but raises problem in how these choices should be examined and evaluated. Large scale surveys can measure functionings and commodities, not allowing the observation of processes of choice nor of opportunities; as Lipton and Ravillion (1995: 2567) point out ‘*we rarely observe capabilities, but rather certain “achievements”*’. What we do know from occupational choice research is that the range of viable alternatives from which individuals make work-related decisions tends to be fairly homogenous, and develops over time as a function of

<sup>16</sup> For example, grandparents’ willingness to provide childcare if they are still alive, able and close enough, or paid care provision such as kindergarten if they are available (depending on entitlements, availability of places, affordable, and reasonably safe and with compatible opening times for working parents.

socialisation. Individuals develop cognitive maps of available choices, matched to their own self-concept (based on their perceived status, gender, socio-economic background etc.). They will therefore usually make selections from fairly restricted, 'suitable' options (Gottfredson 1981; Radford, 1998).

In trying to evaluate the existence of a range of capabilities or functionings raises two problems. First, there is the debate about whether we need to agree a common list of capabilities or even achieved functionings. Second, functionings tend to be measured as categorical variables, (ordinal scales or nominal variables), where there is no equivalent metric to aggregate the total number of functionings. There is no common unit of measurement, or natural aggregator, such as the use of prices in welfare economics, to allow us to compare over a range of dimensions (Kuklys, 2005). This raises additional difficulties for using conventional statistical techniques in order to determine and measure relations of causality. The CA raises considerable issues of conceptual complexity (Chiappero Martinetti, 2004). The solutions given to these issues are diverse and not only based on practicalities as well as on analytical considerations. (These we intend to discuss at interim meeting in March)

### **3.2 ATTRACTIONS OF THE APPROACH**

Despite these difficulties one of the attractions of the CA is that it differentiates means from ends: having more money does not necessarily equate with a higher degree of happiness or life/satisfaction. Having more time, financial resources or childcare does not necessarily result in people having more children. But it certainly makes these options between choosing different 'ways of life' more affordable; it is a complex relationship and one that is not necessarily linear.

Secondly, the CA draws our attention to the variety of preferences and needs and the fact that people and groups vary in their ability to convert commodities into well-being (Robeyns, 2005; Woodfield 2007). These opportunities or constraints can come from macro social factors, or from individual circumstances. For example, someone with a high level of education may want to work but live in a region with high unemployment (e.g.: Eastern Germany, Southern Italy or Spain, or Poland); or they may have a job and want children but their partner doesn't share the same preferences.

Additionally, the concept of freedom is assessed on the effective capability people have to choose a 'way of life' they have reasons to value, although this is a very difficult concept to operationalise. This gives greater weight to agency approaches that may allow us to address some of the controversial issues about what women, men and families want (Hakim 1991, 1995, Ginn et al. 1996, Crompton 2006, Woodfield 2007). Although much evidence suggests that work-related choices are shaped and constrained for individuals by a range of extra-individual factors (family, peers, teachers, careers advisors, discrimination etc.) (Fassinger 1996; HMSO 2005; MacKenzie 1997; Miller *et al.* 2004), there remains a pressing theoretical need to account for why some individuals do buck pervasive trends. How and why do some individuals, for instance, select gender-atypical work, or aspire to occupations outside of the range of alternatives we would normally expect them to select from (O'Brien and Fassinger 1993)? Why do some women and men actively seek out non-standard work patterns in the context of occupational cultures that strongly resist them (Meiskins & Whalley 2002)? Why do some social groups seem to possess more agency than others over their occupational decisions and destiny (Woolley 2006)?

With the proposed research design, combining as it does survey data analyses

with in-depth interviews (being conducted in conjunction with other work packages in this programme) we hope to address some of the controversies and gaps in the research on preferences and achieved outcomes. Although survey data will not allow us to access individualised accounts of how such preferences were shaped, we are able to make comparisons between satisfaction with different aspects of one's paid work, and reasons for quitting it too, and the correspondence between attitudes and behaviour, as well as compare how these have changed over time. Moreover, the collection and analysis of qualitative data should allow for a more thorough investigation of countervailing instances, such as those described above, or instances where reported 'preferences' have not necessarily been associated straightforwardly with outcomes (Aveling 2002; Francis 2002; Padavic 1992), or will help us understand the important overlaps between, say, male and female occupational preferences (Rowe & Snizek 1995) and the ability to realize different preferences.

We propose to develop a "middle range" approach that will allow us to empirically test sensible propositions about what can be expected from an equitable division of labour that would, for example in the case of marital dissolution or unemployment, reduce the risk of future adverse outcomes such as poverty (for the partners but also for their children). We will build on the approach developed in earlier work related to the concept of transitional labour markets (Schmid and Gazier 2003; O'Reilly et al. 2000 and O'Reilly 2003). This work focused on the dynamics of labour market transitions, and the policies, which affect such transitions into and out of employment (Giddens 2007). One of the key issues in this

research has been to emphasise a flow analysis of economic and social life between the boundaries of paid activities and unpaid activities. Analytically this approach has sought to distinguish between the quality of maintenance, integrative and exclusionary transitions in the labour market (O'Reilly 2001, Schmid 2002). We know that those in higher status occupations have higher participation rates, resulting from both a lower risk of exiting paid employment and a higher probability of re-entry after interruptions. However, research has revealed a different impact of partners' resources (Blossfeld and Drobnic 2001) and institutional features (Blossfeld and Hofmeister 2006) across countries. We can use cross-country differences to test some of these.

We intend to explore two key domains related to the development of individuals' capabilities (Sen 1992). First, we will look at basic capabilities (related to '*staying alive*' at a reasonable standard). This will include examining, life expectancy, income sources, basic social services, health-care, and housing. Second, we will compare how a more equitable, or inequitable distribution of opportunities (which increase freedom in 'being' and 'doing') liberates or constrains the realm of 'choices' available to individuals. For example, this would include education opportunities, childcare provisions, employment opportunities and careers and labour market transitions. This project would build on this earlier research allowing us to examine the degrees of constraint or capabilities individuals and households might have to enable them to sustain stable income and employment trajectories, and compare these with those who do not have this opportunity, or outcome.

## 4. EMPIRICAL FOCUS: DECISIONS AROUND FERTILITY AND CARE DECISIONS RELATED TO FAMILY FORMATION

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### 4.1. FERTILITY, DEMOGRAPHY AND LIFE COURSE

#### 4.1.1 Concepts and change

Our emphasis on the life course brings demographic change, both in terms of falling fertility and population 'ageing', into the centre of the analysis. This crucial aspect has hitherto been unduly neglected in the analysis of labour markets and their articulation with households and families. As Dey (2006) and MacInnes (2006) have argued, European states' renewed interest in natalist policies, often taking the form of various policy debates over 'work-life balance' have their roots in anxieties about how to continue to expand the labour supply (which implies expanding the employment of mothers) while also encouraging higher fertility (which implies facilitating mother's temporary withdrawal from the labour market or facilitating the combination of employment and parenting) (Sleebos 2003, Demeny 2003, Caldwell and Shindlmayr 2003, Kok 2004, Fahey and Speder 2004, Chesnais 1998, McDonald & Kippen 2001, MacIntosh 1986). This has led states to reconsider policies in such areas as employment protection, regulation of the volume and scheduling of working hours, maternity and parental leave, child benefit, taxation regimes, provision of childcare or pre-school education social housing provision and so on (Caldwell et al 2002; OECD 2001, 2002, 2003, 2004<sup>a</sup> 2004b 2005). Another way of understanding this is to consider the relationship between the family/household and labour market (as captured by such concepts as the 'male breadwinner system') as simultaneously a regime of reproduction of people and of the production of commodities. Hitherto the former has tended to be relegated to demography and the study of fertility, and

the latter to sociology or economics in terms of individuals or family members' ability to participate in employment and in the distribution of the results of production. Notable exceptions to this have been Davis (1937), Myrdal (1968) and, rather paradoxically, Parsons (1956), while more recently Folbre (1994; 1997) has brought fertility back into the field of political economy.

Myrdal's analysis of the three sources of declining fertility is still a useful point of departure and has not really been surpassed:

'There are three main tendencies working for extreme family limitation: the feeling of insecurity in modern life, particularly with regard to economic support; the cumbersomeness of children and difficulty of fitting their lives into the pattern of adult life in modern civilisation, particularly in the cities; and the fact that children exert a greater and greater pressure on the family economy. Can any means be found that would tend to counterbalance these tendencies?' (Myrdal, 1968:119)

And in particular her precocious realisation that greater gender equality implied not only potential parents equal 'access' to the labour market but also workers equal access to parenting time and resources, *both* regardless of sex:

"Defending the right of the working woman to marry and have children becomes a protection of, and not a threat against, family values. ... What is to be guarded is not so much the "married women's right to work" as the "working women's right to marry and have children" (Myrdal, 1968:121).

However, if we take Sen's approach as our point of departure, we might

reconsider such issues as (potential) parents 'demand' for or desire for children as a particular functioning that might be integrated into different ways of life and potential capabilities. This distinction is important, in that it draws attention to the distinction between general fertility rates (analogous to a 'commodity' in Sen's schema) and the ability of diverse kinds of family, with different levels of resources, to choose a way of life in which the ability to rear children is compatible with other functionings (such as a labour market career over the life course) that they value for its intrinsic worth, as well as for the resources it provides to other life domains. Even more importantly, to the extent that functionings and ways of life previously expressly forbidden or rendered relatively inaccessible to men and women on the grounds of their sex are opened up, we might expect some fairly rapid changes not only in preferences influenced by general social or peer group norms, but also in less constrained choices in functionings. We know that respondent's expressed preferences for children consistently run higher than realised fertility (Goldstein et al 2003; MacInnes and Pérez 2007) but two quite different explanations may exist for this. It may be that realised fertility genuinely expresses an increasingly free choice of functionings, while higher fertility preferences (as revealed in demographic surveys) represent the legacy of patriarchal norms and expectations about reproduction. Conversely, it may be that it is the higher fertility preferences that are genuine, and lower realised fertility provides empirical evidence of various blockages to realising desired fertility that comes from the way education systems, labour, housing and marriage markets function. There is an additional problem (which may also give us hints when explored): the number of children declared as desirable by interviewed is a composition of ex-ante and ex-post beliefs, and it changes with the *experience* of having children (and with realising how

they impact one's capability to choose among other alternative "ways of life"), or more simply by adapting one's "preferences" to the a viable outcome

Many major transitions between different employment states are related to childbirth (Del Boca et al 2004), such that the focus of our analysis is on the parallel evolution across the life course of individuals' labour market and family 'careers' (the latter referring to partnership formation and biological and/or social parenthood). For any transition to take place either the person doing the transiting or their partner has to have some kind of aspiration to have a child. We might also expect the effects to be reciprocal. The better the job the higher the opportunity cost (in terms of employment foregone earnings) of a temporary transition out of it, but also, presumably, the higher the capacity to 'afford' this cost given higher earnings. The more desired the child, and the lower its direct costs in terms of the arrangements for parenting (e.g. school schedules, public childcare, transfers, benefits, low penalty temporary labour market transitions etc) the higher the opportunity cost of (in terms of children foregone) of not undertaking some transition (Lewis and Giullari 2005; Hobcraft 2004; 'Jacobs and Gerson 2004; Kohler et al. 2002).

We know from attitude survey evidence that individuals across Europe report very high and stable levels of aspiration to form a family, have children and enjoy a family life (which most individuals claim to be their most satisfying life domain) (Goldstein et al 2003). At the same time potential and actual parents regularly report that both their family life in general and their ability to have children in particular, is restricted by the increased direct and opportunity cost of children in terms of time and money (Diprete et al 2003; Stark et al 2001; De Santis & Livi Bacci 2001). We also know that on average the direct actual 'cost' of producing children as a

proportion of the resources commanded by families must have fallen in real terms because of advances in domestic technology, the trend towards the greater collectivisation of such costs through the development of education health and other social services, the probable increase in support available from grandparents, and through the general rise in living standards (both in terms of the amount of leisure time available after meeting paid work and domestic work obligations and in terms of incomes). The 'opportunity cost' of children is another matter. But since opportunity costs always express the alternative activities individuals might undertake, such opportunity cost might be taken to reflect the availability of a wider range of functionings, ways of life and capabilities (and thus of potential social quality).

There have been three fundamental changes that have altered the family/labour-market/state relationship that we are examining. The first is the withdrawal of the state, and other related institutions such as the church, from almost all attempts to regulate reproductive sexual behaviour by law (legalisation of contraception and abortion, reform of marital and family law, including the legalisation and liberalisation of divorce) (MacInnes and Pérez 2005). Although this is not true for the Catholic Church in Italy (see the Law against assisted fertility practices) The second is what might be loosely called the decline of patriarchy, or the move towards greater equality of opportunity in education and the labour market for women (despite the high level of segregation in both education and employment), combined with the rather rapid change in social norms and beliefs regarding the sexual division of labour in its widest sense. Both these two changes have come to be understood in the demographic literature as a putative 'second demographic transition' although the concept itself and lines of cause and effect are the subject of intense debate

(Van de Kaa 1990 and n.d.; Coleman 2003; Cliquet 1991). One aspect of this has been the erosion of the male breadwinner system and the sex-based division of priorities in couples between employment and household care work (including both parenting and the domestic support of other family members) (Fraser 1994). Another, perhaps less well understood aspect, has been the inexorable increase in alternatives to motherhood for women, and the decline in the relative attractiveness to women of marriage to a male breadwinner compared to consolidation of an independent labour market career. For example between 1960 and 2001 the relative female activity rate (RFAR - women's economic activity rate expressed as a percentage of the male rate; Siaroff 1994) increased from 44% to 75% in the fifteen member countries of the European Union. This change has been especially rapid in Southern European countries such as Spain, Greece and Italy. In Spain, where the RFAR rose from 26% to 59% in this period, including a rise of fifteen percentage points in the last decade (OECD 2002). In the Scandinavian countries (Finland, Denmark and Sweden) women's employment is around 90% that of men's. In the UK, the Netherlands, Belgium, Germany Austria, Portugal and France it is around 80% while in Spain, Italy and Greece it is just under 60%. Only one country does not fit well into these three groups: Ireland has moved, in the course of the 1990s, from the third to the second group. Of course, employment totals tell us nothing about the terms under which men and women are employed and the quality of these jobs.

Following from this, increased divorce and cohabitation has produced a greater proliferation of family forms and family careers, while labour markets have responded, if at all, only rather slowly to these changes in the reproductive regime. The third has been the decline of the family/household as a site of production as opposed to reproduction or consumption

(Braverman 1974). Much domestic labour has been exported to the market (clothes production and maintenance; food production and preparation, entertainment) whilst other activities have been revolutionised by technological innovation (entertainment; heating; cleaning and washing).

#### **4.1.2 Analytical problems and labour market transitions**

There are four main analytical problems in developing a research methodology to understand care related labour market transitions adequately. The first is that because both generational (life course) and period (general social change) effects are in operation cross-sectional data is of limited use. It gives us information about the later stages of the life course for older respondents whose labour market and family careers started in earlier periods, combined with data on the early life course stage of younger respondents growing up at a later period. This is accentuated by the fact that such 'period' change has occurred at different rates and from different starting points in different states. This makes comparative data at any point in time even more difficult to interpret, especially when at first sight, it appears to provide 'promising' results such as the reversal in the sign of the cross country correlation between women's employment and fertility (Ahn & Mira 1998, Castles 2003).

The second is that the relationship between employment and care is contradictory. Employment and care activities are mutually exclusive in the sense that each decreases the time available for, and complicates the scheduling of, the other. But they are mutually interdependent, at an individual family level in the sense that employment is the main source of resources for caring activity, and at a social level in the sense that only care activity (generationally and immediately) reproduces individuals able to participate

in the labour market. How this contradiction is resolved is also difficult to trace cross-sectionally since the resolution (as our emphasis on transitions makes clear) is usually achieved over time. Intensive and extensive (in terms of volume of hours) childcare is confined to the first years of life and occupies a decreasing proportion of parents (lengthening) lives. The adjustments made by parents are ones made across a life course within which many transitions may be seen (and foreseen) as temporary.

The third is that while 'money' is a relatively straightforward resource to measure (although complicated in practice by the need to supplement knowledge of current resources with future potential ones, and by assumptions made about the substitutability of income and wealth), time is an altogether more complicated phenomenon. Time is not a resource as such, although it is conventionally discursively treated in this way. No individual 'has' more or less time than any other: days always have 24 hours. What individuals, families or firms do have is different ranges of alternatives for the purposive use of such time. This makes 'time stress' a difficult concept to measure. At one level it refers to widening *opportunities* to use time in different ways, while at another level it may refer to widening *obligations* to perform different activities within a given amount of time. Both can be understood in terms of the 'price' of time, but only insofar as it can be seen to have an opportunity 'cost' (Becker 1965; Linder 1970). Time use, therefore inevitably leads us to look at 'preferences' which may be intrinsically hard to measure and to dissociate from norms and choice of social comparators. For example, while people report ever increasing levels of time-stress (an intuitively attractive concept that nevertheless defies definition) it can be shown that both in the USA and Europe, working hours are in clear trend decline and leisure time has steadily increased

(Robinson and Godbey 1999; MacInnes 2005).

This is further complicated by what Baumol (1967) referred to as the 'technologically non progressive' nature of activity (whether consumption, production or reproduction) that requires real time human interaction (as in almost all caring work and more generally in most service work). By remorselessly cheapening things relative to services, technological innovation has the perverse effect of making the latter appear relatively more costly. Baumol's argument was developed to explain deindustrialisation and the fiscal squeeze on the state produced by its responsibility for public services. However, it also has tremendous implications for the care work, analogous to 'service' work, undertaken within households and families, and the consequent range of functionings and capabilities they may aspire to.

Finally, insofar as care work concerns children, it raises the issue of child 'quality', or what might be better understood as rising aspirations or, still more generally 'progress'. It seems fairly obvious that Europe has experienced a steady ratcheting up of the standards of care imagined to be desirable for raising a child: but to what extent this represents the realisation of a desirable 'functioning', or the imposition of external obligations and regulations (internalised or not) is extremely difficult to measure (Budig and Folbre 2002; Craig and Bitmann 2004; Fisher et al 1999; Gauthier et al 2001; Hallberg & Klevmarken 2001). However this inevitably must appear in our analysis both as a 'preference' (changing ideals etc) and as a *cost* in our examination of fertility trends in Europe and questions around: Who decides to have children and why? What impact do state policies and provisions have on shaping choices? And how do the concepts of realised functionings or capabilities help us understand this?

## **4.2. HOUSEHOLDS, FAMILY FORMATION AND CARE**

Our second point of empirical focus is on households that already have children – what experiences do they have and how do they vary across countries and class? We examine households around the time of family formation and increased caring responsibilities to see how this impacts on the declining male breadwinner system as a reproductive and employment regime (MacInnes 2005; Nazio and MacInnes 2007). The value of such an innovative approach is to allow us to give more emphasis to how actors within particular societies are capable of facilitating, or circumventing, existing institutional provisions, or the lack of them, in order to achieve a particular work-life balance.

Our focus on households as a unit of analysis has three advantages. First, it allows us to examine the affect of interdependence between the characteristics, activities and choices of both members of the couple (Mincer and Polachek 1974, Blossfeld and Drobnic 2001, Aassve et al. 2004). Secondly, household patterns tend to have long term consequences for the life chances of individuals and their future agency (e.g. independent income, saving opportunities, entitlement and amount of retirement and/or unemployment benefits, etc.) Third, from a cross-national comparative perspective it allows us to link the characteristics of national welfare regimes and their impact on individual household types. At the individual level interruptions to employment continuity may result in adverse outcomes later in life. However, at the societal level, given that educational homogamy is high and persistent (Blossfeld and Drobnic 2001), there is a risk of a polarisation of opportunities and life-chances between highly educated women (in high income double breadwinning couples) and lower educated women (more likely to be found in couples with lower household income more



exposed to unemployment,) or single earner households.

There is still an unequal gender division of paid employment and unpaid caring (and domestic) work between spouses within households which is resistant to change (Gershuny et al. 2005, Breen and Cooke 2005) despite increasing participation of women in paid employment. Men seem to be reacting very slowly to women's increasing burdens. Preliminary evidence for Germany shows that married couples tend to converge to a traditional division of work with time (Thiessen et al. 1994). When there is an increasing demand for care, women still more often reduce their time in paid employment, only re-entering employment when the need for care is reduced (Gershuny et al. 2005). The presence of young children is significantly related to women's reduction of paid work, though institutional contexts and labour market structures matter in the strength/shape of these effects. Higher occupational resources tend to result in higher participation for women, resulting from both a lower risk of exiting paid employment and a higher probability of re-entry after interruptions. However, research has revealed a different impact of partners' resources on the degree of women's employment (Blossfeld and Drobnic 2001) and institutional features (Blossfeld and Hofmeister 2006) across countries. For the USA and Australia, evidence confirm exchange-bargaining theory (women decrease their amount of unpaid housework with increasing earnings). But after the point where both contribute equally, for couples where women earn more, they also seem to compensate for a deviation in traditional expectation by contributing a higher share of unpaid domestic work (Bittman 2003).

#### **4.2.1 Entitlements: explaining women's 'adaptation' to an unequal distribution of work**

In our research we intend to link this empirical focus to the theoretical debates on capabilities outlined earlier in this paper by drawing on the concept of entitlements developed in the work of Major (1993). She defines entitlement as an "*expectation with normative force*" which is derived from comparisons and justifications and shaped by what one wants. A sense of entitlement is experienced as a moral imperative or right. Women might accept an unequal division as 'fair' because they have a different sense of entitlement to men. Gender differences in entitlement are claimed to be produced through three mechanisms: (1) *comparison standards* (used to evaluate entitlements to receive or expect in a relationship); (2) *justifications* (whereby discrepancy might be viewed as legitimate); and (3) *gender specific socialisation* to different values/wants.

#### **4.2.2 Comparison standards**

Looking at different *comparison standards* Major distinguishes between *social*, *normative*, *feasibility* and *self comparison*. By *social comparison* she argues that women and men tend to compare their work and contributions to members of their own sex, rather than making cross-sex comparisons. Such comparisons may lead them to the conclusion that their situation is less unequal than that of their parents or other couples. Same-sex comparisons are more likely than making comparisons across the gender divide. This is because the 'other' sex is seen as inherently different, and/or because of a need for self-protection, to avoid psychologically distressing comparisons, especially for those in a relatively disadvantaged position who may feel unable to change the situation. *Normative comparison* is understood as what is perceived as a socially acceptable or appropriate distribution of tasks. A socially acceptable

workload, even when unequal, may not be perceived as unfair or unjust and will not conflict with one's sense of entitlement if it is in line with a perceived social norm, and accepted as such. *Feasibility comparison* refers to what are perceived as possible and attractive alternative arrangements. For example, the double burden of paid work and caring may be seen as preferable alternative to the consequences of inactivity (or preferable to the conflict necessary for a different negotiation or, in an extreme case, to divorce). Finally, *self-comparison* refers to what one has contributed or received in the past.

#### **4.2.3 Justifications & gender specific socialisation**

In developing the concept of justification Major tries to explore how an unequal distribution of tasks may be perceived as a fair allocation if (a) the procedures adopted to reach it are perceived as fair (e.g. if they allowed to express and discuss concerns and bias) or if (b) the distribution match an endorsed justice rule such as equity, equality or need. However, the application of equity or equality principles implies very different outcomes (the distribution of responsibilities may in fact occur across, instead of within, resource categories: income, or the "responsibility" for its provision, may be interchanged with an actual provision of care). Finally, *gender specific socialisation* points to identity related mechanisms (West and Zimmermann 1987).

Whatever the specific mechanism at play providing men and women with a different sense of entitlement, this results in a persistent gender unequal distribution of (unpaid) workloads, which in turn fosters sex-segregation in employment and the persistence of a gender pay-gap (Major 1989). Thus, insofar as our interest is in the capability to pursue alternative "ways of life" both a lower pay for an equal job (in the labor market) and an equal amount of unpaid work (within the

household) may constrain women's current and future agency in a stronger way than for men. It provides women with both a lower capacity to convert the same amount of resources –time and skills- into money, and a lower amount of acquired resources (human capital, money earned and time for earning it) to be converted for pursuing a preferred "way of life" (Gershuny 2004).

A complementary explanation to women's contentment with an unequal allocation of workload and a lower agency relative to men is the resources-bargaining approach, in a setting (households) that require conflicts to be resolved cooperatively (Sen 1992, Breen and Cooke 2005). Faced with a bargaining problem and potentially many alternative solutions, households will tend to allocate responsibilities on the basis of perceived interests rather than objective measures of well-being: "What would have looked, in the format of the "bargaining problem", like a might-is-right bargaining outcome (e.g., giving a worse deal to the person with a weaker bargaining position) may actually take the form of appearing to be the "natural" and "legitimate" outcome in the perception of all the parties involved." (Sen 1990: 140)

Such a gender unequal outcome of the bargaining process, perceived as satisfactory in the eyes of its adopters, is likely to result from gender differences in: well-being levels at break-down positions (see also Breen and Cooke 2005); perceived interests (whereby actors may pursue exclusively self-interest or perceive an extended responsibility which includes other parties' well-being) and; perceived contributions (different perceptions and evaluations of care work, entailing expressive love, and paid employment). Cooperative conflicts thus generate cumulative disadvantage on the part of the weakest bargaining agent, due to a self-reinforcing mechanism. Disadvantage increases through bargaining since by accepting an unfavorable outcome the weakest part will retain and even lower her

breakdown position for the subsequent negotiation.

Recent studies have confirmed that, despite women's employment, gender does not trump money (Bittman et al. 2003) and that both time (Thiessen et al. 1994) and childbirths (Gershuny et al. 2005) are responsible for triggering a more traditional division of labour. With respect to fertility, it has been found that fathers' degree of involvement in the unpaid care for children, increases mother's likelihood to engage in subsequent births in Denmark and Spain (Esping-Andersen et al. 2005). However, fathers' involvement in unpaid care work does not seem to impact much on women's employment outcomes in Spain (Gonzalez 2006). In our study it will be particularly important to distinguish class (resource) divides between household strategies: are more egalitarian families in

terms of distribution of unpaid work better-off? Are these families also more capable of outsourcing? One of the consequences of these types of justification and negotiation mechanisms is the sex-segregation in employment and the persistence of a gender pay-gap (Major 1989). The implications for our approach is that it can explain why some groups, in particular low paid women workers have both less capacity and less incentives to convert the same resources –time and skills into monetary rewards and resources.

By linking these theoretical developments in our empirical research we can consider the way in which the future of the European social model could entail a real choice for employees in terms of the types of transition choices they can make, as well as feeding into the work package on Social Quality.

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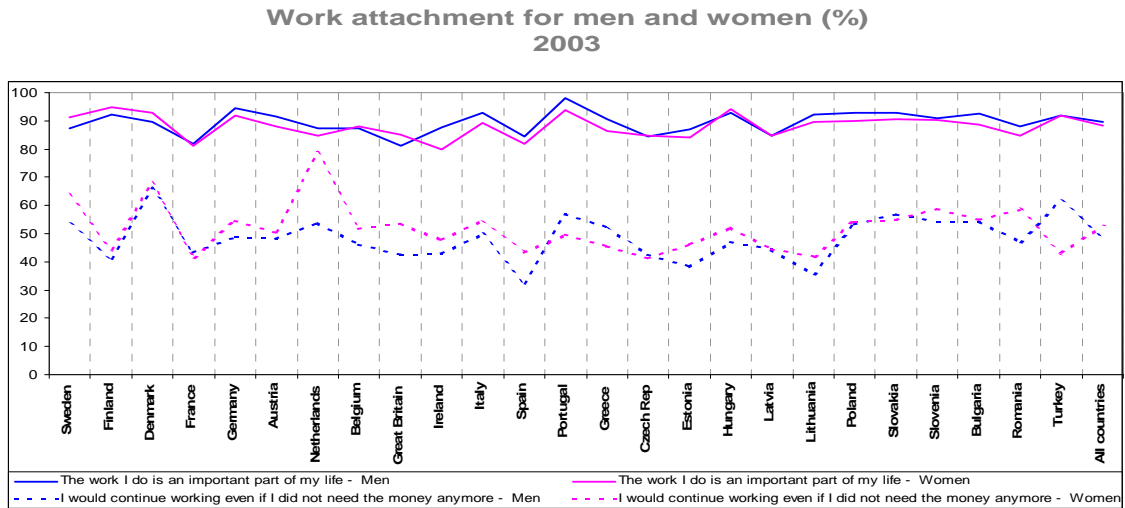
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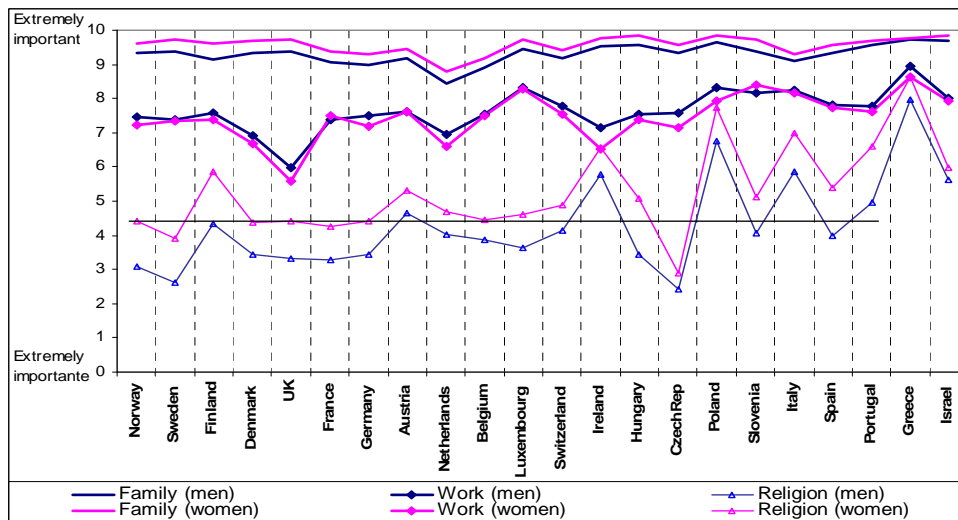
## Appendix

**Figure 2.1.**



**Figure 2.2.**

**Importance attributed to family, work and religion in men and women's lives**  
ESS, 2002



**Table 2.1. Work, time and money, by life course and sex (%)**

	Childless Until 35		Pre-school/School children		Childless 36-50		Childless > 50		Total	
	M	W	M	W	M	W	M	W	M	W
The work I do is an important part of my life	86	87	90	87	90	90	92	89	89	88
I would continue working even if I did not need the money anymore	48	57	51	53	47	52	43	48	48	52
I would like to reduce the time spent working, but I need the money that I earn	66	64	72	65	67	66	61	62	68	65
I would like to reduce the time spent working, even if I earn less money	12	12	13	15	13	13	17	16	13	14
I would like to work more hours if it earned me more money	57	55	54	44	48	48	40	39	51	46
I could easily get by with less money	15	12	13	14	18	13	21	18	16	14

Source: EB 60.3 and CCEB 2003

**Table 2.2. Work, time and money, by country and sex (%)**

	The work I do is an important part of my life		I would like to reduce the time spent working, but I need the money that I earn		I would continue working even if I did not need the money anymore		I would like to work more hours if it earned me more money		I would like to reduce the time spent working, even if I earn less money	
	Men	Women	Men	Women	Men	Women	Men	Women	Men	Women
<b>All countries</b>	<b>89.3</b>	<b>88.1</b>	<b>67.4</b>	<b>64.6</b>	<b>48.1</b>	<b>52.5</b>	<b>51.4</b>	<b>45.8</b>	<b>13.3</b>	<b>14.4</b>
Denmark	89.8	92.8	48.5	48.0	65.9	68.2	38.6	17.5	23.5	26.0
Finland	92.1	94.8	67.0	69.1	40.9	44.2	34.0	29.7	20.9	17.7
Sweden	87.4	91.1	58.9	64.4	53.3	63.7	29.3	26.4	16.3	17.1
Austria	91.7	88.1	53.3	49.8	48.2	50.2	40.9	39.1	10.5	16.2
Belgium	87.4	87.9	63.8	60.9	46.1	51.6	47.4	34.0	15.4	15.8
France	82.0	81.2	75.5	76.8	43.2	41.6	52.0	44.4	16.0	18.4
Germany	94.4	92.0	59.6	48.6	48.7	54.6	46.2	43.3	7.6	9.9
Netherlands	87.5	84.8	49.7	37.9	53.8	78.8	29.4	23.4	19.4	16.7
Great Britain	81.2	85.0	76.2	61.4	42.5	53.7	50.2	35.8	18.0	19.1
Ireland	87.8	79.8	71.5	63.7	42.7	47.6	45.5	30.2	14.8	20.6
Greece	90.6	86.4	75.4	75.8	52.2	45.5	59.1	48.5	13.4	19.7
Italy	92.8	89.2	69.0	63.2	49.8	54.4	52.3	45.1	17.3	25.5
Portugal	98.1	94.0	72.4	83.1	56.7	49.7	59.0	52.5	13.3	12.0
Spain	84.5	81.8	83.0	73.3	32.1	43.2	36.8	41.5	14.1	16.5
Czech Rep	84.4	84.9	65.1	64.9	42.5	41.2	47.6	45.3	8.4	10.2
Estonia	87.1	84.1	65.3	70.1	38.2	46.2	75.1	68.1	5.3	7.2
Hungary	92.9	94.2	74.8	74.8	47.1	52.2	45.7	48.7	2.9	4.9
Latvia	84.8	84.6	73.8	77.2	44.5	44.4	68.8	60.6	12.2	14.1
Lithuania	92.2	89.4	78.7	72.9	35.7	41.7	70.4	67.4	4.8	9.2
Poland	92.9	90.0	75.7	68.8	53.3	54.4	62.7	57.5	16.0	13.1
Slovakia	92.8	90.6	65.6	66.4	56.9	54.7	67.2	65.0	3.6	2.2
Slovenia	91.1	90.2	55.3	62.3	54.2	58.8	51.4	48.0	21.2	17.6
Bulgaria	92.5	88.7	78.1	75.1	54.1	54.8	82.9	81.9	6.8	9.0
Romania	88.0	84.7	71.1	72.4	47.0	58.3	75.3	78.5	8.4	10.4
Turkey	91.8	91.8	75.5	77.6	61.2	42.9	67.3	59.2	18.0	14.3

Source: EB 60.3 and CCEB 2003

**Table 2.3. Statements about working part-time, by life course and sex (%)**

	Childless until 35		Pre-school/School children		Childless 36-50		Childless > 50		Total	
	M	W	M	W	M	W	M	W	M	W
Working part-time (or taking frequent leave) is an indicator that someone is less committed to his/her work	25	21	28	21	27	21	27	22	27	21
Working part-time (or taking frequent leave) is bad for someone's career	44	43	48	44	47	45	50	48	47	45
Working part-time (or taking frequent leave) usually means that you have to do more in less time	42	45	46	47	47	50	48	53	45	48
Working part-time (or taking frequent leave) means that you get less interesting tasks to do	33	31	35	29	36	32	36	33	35	31
Working part-time (or taking frequent leave) is possible in my present job	32	41	29	47	31	37	33	46	31	43

Source: EB 60.3 and CCEB 2003

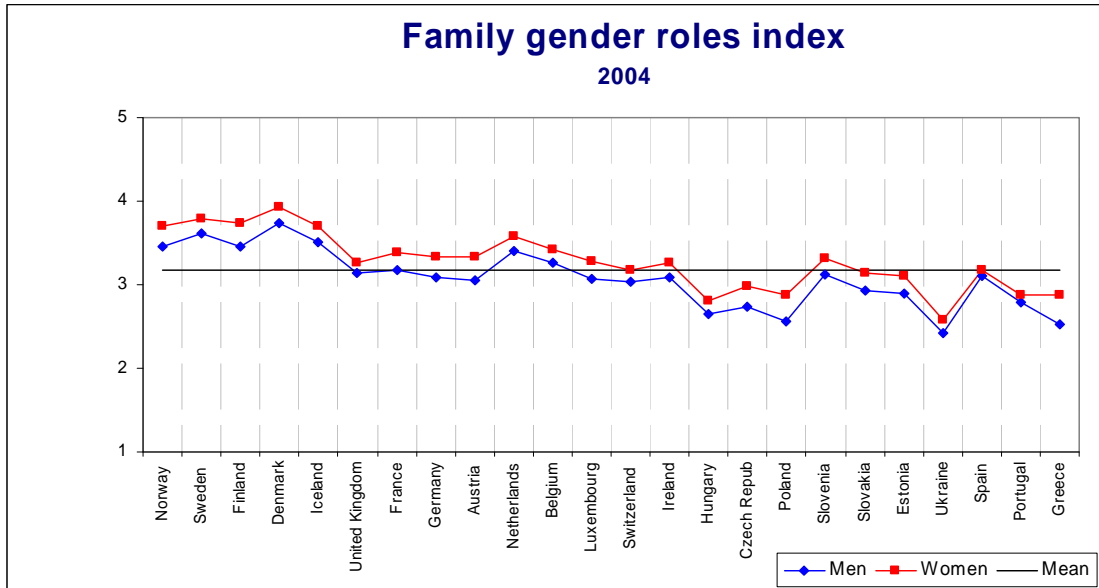
**Table 2.4. Statements about working part-time, by country and sex (%)**

	Working part-time (or taking frequent leave) is an indicator that someone is less committed to his/her work		Working part-time (or taking frequent leave) is bad for someone's career		Working part-time (or taking frequent leave) usually means that you have to do more in less time		Working part-time (or taking frequent leave) means that you get less interesting tasks to do		Working part-time (or taking frequent leave) is possible in my present job	
	Men	Women	Men	Women	Men	Women	Men	Women	Men	Women
<b>All countries</b>	<b>27</b>	<b>21</b>	<b>47</b>	<b>45</b>	<b>45</b>	<b>48</b>	<b>35</b>	<b>31</b>	<b>31</b>	<b>43</b>
Denmark	22	14	51	44	43	45	35	31	41	60
Finland	28	21	50	41	55	53	43	34	47	61
Sweden	20	12	66	52	71	65	46	34	51	59
France	28	20	49	41	50	48	41	36	36	56
Germany	17	14	52	50	47	58	39	36	24	53
Austria	24	16	52	42	43	37	42	32	28	43
Netherlands	28	20	46	47	55	57	39	35	52	75
Belgium	16	15	32	27	38	39	26	27	37	50
Great Britain	26	10	41	27	40	39	35	26	40	72
Ireland	16	10	28	26	42	39	24	20	28	50
Greece	25	20	60	57	50	47	31	17	31	40
Italy	40	32	55	43	32	39	39	26	28	47
Portugal	34	27	43	37	37	41	29	28	26	23
Spain	21	22	34	38	33	42	13	12	27	34
Czech Rep	30	21	46	43	39	39	47	42	27	35
Estonia	35	35	55	60	56	61	39	39	29	27
Hungary	18	19	41	50	27	36	28	27	17	19
Latvia	53	46	59	63	54	56	47	41	23	34
Lithuania	28	28	46	48	47	59	16	17	23	31
Poland	31	28	50	48	54	59	43	36	41	39
Slovakia	28	19	43	38	50	46	46	36	24	24
Slovenia	34	23	63	53	49	44	41	35	19	28
Bulgaria	29	28	52	61	55	64	24	20	19	14
Romania	33	28	31	38	31	28	25	30	17	20
Turkey	26	29	34	43	29	47	29	27	21	20

Source: EB 60.3 and CCEB 2003



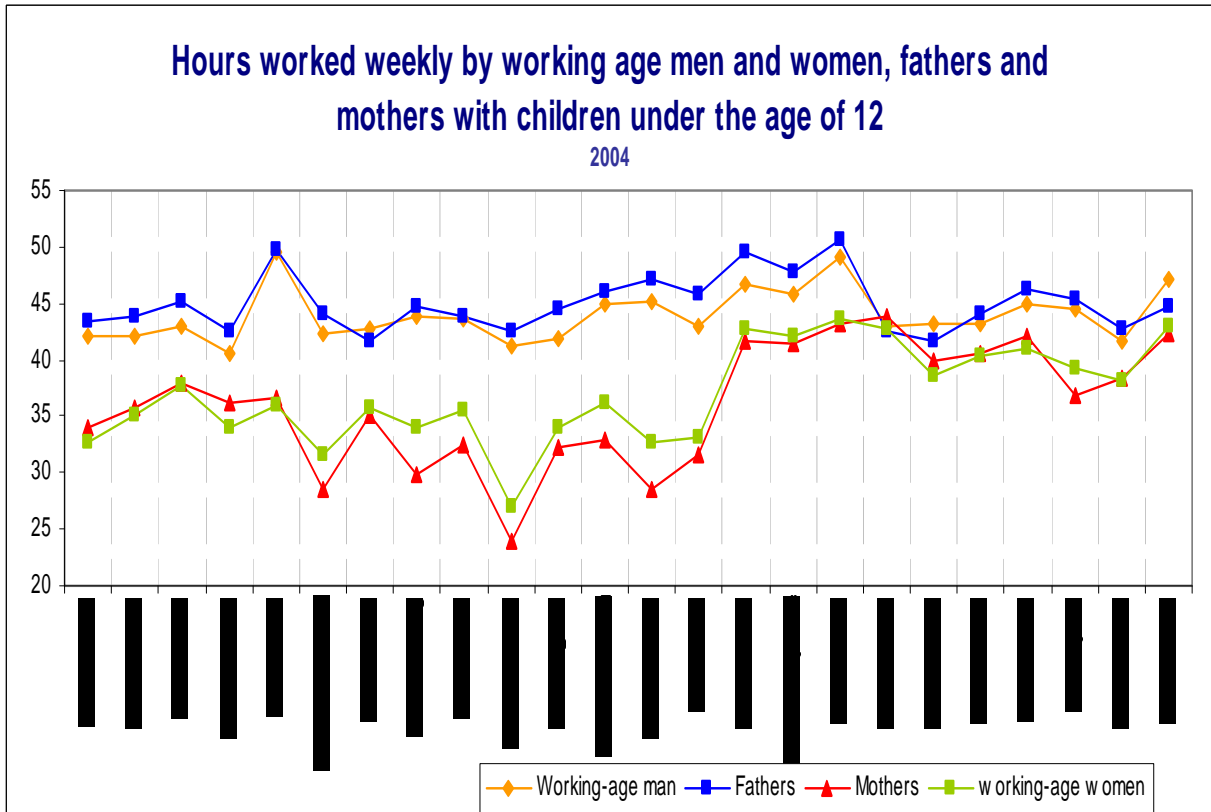
Figure 2.3.



Indicators considered in the index construction:

- Women should be prepared to cut down on paid work for the sake of the family(2,68);
  - Men should have more right to job then women when jobs are scarce (3,31);
  - If there are children at home, parents should stay together, even if they don't get along (3.31) ;
- Scale: 1 = total agreement / 5 = total disagreement

Figure 2.4.



## **FLEXIBILITY AND WORK-LIFE BALANCE**

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Tamás Keller, András Gábos, Analia Torres, Rossana Trifiletti,

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## 1. INTRODUCTION

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The structure and main determinants of decisions that individuals or couples make to reconcile their participation on the labour market with family life are widely discussed in the literature, including the role of flexible work arrangements in achieving the so-called work-life balance. This issue is of interest to three main social science disciplines: sociology, economics and psychology. Our intention is to summarize both the theoretical and empirical aspects of this research topic as they are discussed in the related literature. We will suggest that discussions of work-life balance and flexible work necessarily make assumptions about the relationship between the domains of the public and the private (Pahl 1984, Hochschild 2000), as well as the formal and the informal (Trifiletti 2006), and therefore will benefit from a more explicit examination of their inter-dependencies. In as much as the boundaries between those domains shift over time and vary between different institutional environments we argue that this project needs to critically assess the assumptions made in the theoretical discussions and empirical work, and to

offer a broad conceptual framework that will be able to capture both contextual specificity and broader historical trends in the relationship between work and life. To be more specific, work-life *balance* can also be discussed in relation to *conflict* (Greenhaus and Beutell 1985), *reconciliation* (Trifiletti 2006), and *facilitation* (Balmforth and Gardner 2006), while flexibility can be seen as a working and social arrangement that is *structurally privileged*, within a given historical juncture (Jessop 2001), yet one that is pre-determined in neither its temporal horizon, where there can be both *strategies* and *tactics* (de Certeau 1988), nor in terms of its content and impact on individual actors, where there can be *high status* and *low status* forms of flexibility (Wallace, Sik, and Simonovits 2005). In what follows we are going to first look at debates on work-life balance, then we will address debates on flexible working arrangements, and finally we will examine the inter-relationships between flexible work and work-life balance within the context of comparative empirical studies.

## 2. WORK-LIFE BALANCE

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### 2.1. WORK-LIFE CONFLICT AND WORK-LIFE BALANCE

*Work-life balance* refers to the harmonization of work and family-related issues within the individual life course. Because balance is a unique point of every system, there are two kinds of conflicts that arise from the relationship of work and family life: work-family conflict and family-work conflict. (Greenhaus and Parasurman, 1986; Cinamon 2006: 203; Balmforth and Gardner, 2006: 69) *Work-*

*family conflict* can be seen as the negligence of family responsibilities in favour of working life. *Family-work conflict* is therefore the opposite, when work obligations are neglected because of family pressures (Blyton et al., 2006: 2). Rijswijk et al. (2004) describe the same duality using the terms of *work-to-family interference* and *family-to-work interference*.

Examining the nature of work-family and family-work conflicts

Greenhaus and Beutell (1985) identify three main sources of the conflict: time-based conflict, strain-based conflict and behaviour-based conflict<sup>17</sup>. *Time-based conflict* occurs when the time needed to meet the obligations of one domain (e.g., work) is consumed by activities relating to the other domain (e.g., family). *Strain-based conflict* occurs when strain related to one domain acts as an obstacle to meet the demands of the other, when for example someone is not able to work properly because of tension rooted in the family, for example stress at home may manifest itself in illness and inhibit fulfilment of obligations in the workplace. Further, we

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<sup>17</sup> Conflict can also be discussed in relation to what Reynolds (2004) calls time mismatch, or the mismatch between desired working-hours and available hours on the labour market that prevents people from working their preferred hours (Reynolds, 2004: 91). He distinguishes three categories of mismatch. *Structural mismatch* is when the demand for particular work arrangements does not meet with the supply. When for example the number of people on the labour market intending to work part-time is greater than the number of workplaces offering part-time arrangements. *Frictional mismatch* is the result of changes in workers' preferences. The conflict arises when people who would like to work part-time, for example, after a birth realise that reducing working hours may require a compromise between their desires and career prospects, or even – in some cases – to find a new job. *Hours mismatch* is the result of market fluctuation. During a recession people are willing to work more for fear they may lose their jobs. However, because organisational productivity increases as a consequence pay becomes higher and work hours are reduced (Reynolds, 2004: 98).

The paper explains, among others, the time mismatch with family and work characteristics regarding USA, Japan, West Germany and Sweden, using 1997 ISSP data. The results are surprising in that women with children in the United States “are not more likely to want a reduction in work hours than lone childless men.” (Reynolds, 2004: 115) The demand for a reduction in working hours was mostly pronounced by Swedish people, where working hours are still low. However we have to keep in mind that work and family conflicts are not the best factor for understanding time mismatch because other factors, such as financial and income preferences, also contribute to time mismatch.

can speak about *behaviour-based conflicts* when the behaviour developed in one domain cannot be made consistent with the behaviour required in the other domain. Thus, there is evidence that it is sometimes difficult to switch from behaviour appropriate in the workplace to that which is appropriate at home. The conflict arises when someone is not able to switch in time between the two behaviour-schemas.

There is a wide diversity of factors that all contribute to the difficulty of balancing work and family life. These are related to a combination of institutional arrangements, culturally defined expectations, individual and household circumstances and histories, as well as the ways in which all of those factors change and the degree to which they are re-adjusted to each other over time. Blyton et al. (2006) for example focus on the individual and combined influences that changes in workplaces, roles, values, households and support structures have on the work-life conflict. They argue that different types of conflicts between work and life arise depending on the types of households and the expectations of the household members. Women with higher educational levels are more likely to invest in their careers at the expense of domestic duties<sup>18</sup>.

Expectations however are not only dependent on class but are also culturally embedded in the broader sense. Thus, Blaskó (2006), analysing ISSP data for Hungary, found that Hungarians believe that doing household work is mainly a woman's responsibility, which in turn could explain the predominance of women doing household work in Hungary. Such traditional attitudes (Blaskó, 2006:33) could to some extent be explained by the structural changes of Hungarian society and the financial difficulty experienced by many Hungarian families within the

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<sup>18</sup> The authors' conclusions are supported by the empirical evidence of Campbell (2000).

transitional context (Tóth, 1995)<sup>19</sup>. Thus women have to maintain a full-time job because of households' generally weak financial situations and they have to also do the housework. This is the reason why even women, in addition to the men, think in a traditional way about women's roles in the household. As a consequence, women prefer to stay at home caring for children to avoid at least half of their responsibilities. Given different cultural contexts it may be work or family that is given priority and this would tend to create difficulties within the other domain. Thus, if the work-family culture does not support family life then the conflict between work and family is greater and as a consequence the self-reported stress is also greater (Mauno, Kinnunen and Pyykkö 2005)<sup>20</sup>.

Work-life conflict is also dependent on the actual arrangements of the distribution of domestic tasks, with people are less likely to experience a work-life conflict where domestic work is shared (Crompton and Lyonette 2006). The distribution of domestic tasks is to some extent dependent on cultural expectations but could also be linked to the ability of individuals to perform specific tasks, self-efficacy ability, and to their parental heritage. Thus people from families where the household work was done predominately either by the mother or father are more likely to suffer from such conflicts than people who inherited an egalitarian model of sharing the household work (Cinamon 2006)<sup>21</sup>.

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<sup>19</sup> Based on ISSP data for 1994.

<sup>20</sup> The study is based on Finnish companies and the authors measured the work-family culture through management's disposition towards the family in company policy: e.g., to what extent was the management's policy accommodated to family needs.

<sup>21</sup> Cinamon (2006) investigates more than 350 students from two universities to learn more about anticipated conflicts between work and family. She finds that the anticipated family-work conflict is greater than the anticipated work-family conflict. Although the difference between the two kinds of

The tension between work and family arrangements could also be sustained by a tension between dynamic changes in social arrangements, on the one hand, and expectations, state regulation, and individual adjustment, on the other. Jane Lewis for example argues that while the male breadwinner model has eroded the social reality is still far from a family comprised of self-sufficient, autonomous individuals. While women's behaviour has changed substantially in respect of paid work, they still perform the bulk of unpaid care work. The monies allocated to care are considerably less than those designed to get people into work and make work pay. The promotion of care services is more likely to promote women's paid work than cash payments for care leaves. Anything to do with care tends to be poorly valued. Care continues to be associated with women rather than with both the sexes, and carers are profoundly disadvantaged. The fate of women depends on what provisions are made for unpaid care work<sup>22</sup>.

The lack of care support, and the overburden of women, given the unequal sharing of paid and unpaid work, is particularly visible in societies that have a long tradition of inter-generational help (Daly 2005). Daly alerts for the fact that family policy response is becoming narrower in focus and that there is disjuncture between family life and family policy in ways like: 1) the association between having children and income constraint; 2) the inequality in the internal division of labour in families and the constrained opportunities for both men and women to care for their families; and 3) the

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conflicts is statistically significant, there is a very low difference between the means (0,08). This finding is in contrast with prior research, which states that the work-family conflict is more widespread.

<sup>22</sup> A reorientation of policies is sustained by the author that suggests the need to value care activities with an alternative perspective (capabilities approach).

lack of quality in family lives. The author points out the necessity of policies focusing on the balance between horizontal and vertical equity, targeting women whose opportunity costs of children are higher and which recognize a diversity of family life situations across the life course (Daly, 2005).

The latter points are a good illustration that conflicts between work and life however cannot be explained solely by reference to cultural factors, expectations and family histories, but are also dependent on state regulation and policies. This point is taken further by Rosemary Crompton and Clare Lyonette (2005b)<sup>23</sup> who, drawing on ISSP data, argue that work-family conflict vary within national, individual and family circumstances, reflecting the “availability of state-provided extra family supports for caring and also a wider economic and labour market policies that will include tax systems, employment protections and regulations, etc.” Following that it could be expected that in countries such as Britain, France and Portugal where there is no evidence of state policies that explicitly encourage men to take on a larger share of domestic work (in contrast to the Scandinavian countries) there will be a stronger work-family conflict. Indeed, their analysis revealed that the institutional and policy context in countries such as Finland and Norway does have a positive impact on individual levels of work-life conflict. The pressure was stronger at the workplace than at home and especially among

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<sup>23</sup> A work-life conflict scale was constructed, using four items from the survey (respondents were asked to indicate for each item whether this occurred several times a week, several times a month, once or twice, or never. Higher scores indicate higher work-life conflict). *I have come home from work too tired to do the chores which need to be done; It has been difficult for me to fulfil my family responsibilities because of the amount of time I spent on my job ;I have arrived at work too tired to function well because of the household work I had done .I have found it difficult to concentrate at work because of my family responsibilities.*

women, young and high qualified workers and families with children. The most significant factor of stress appeared to be the larger number of hours worked. A reduction in working schedules could then be part of the solution. And really we can observe that, in the Nordic countries, mothers’ working hours are lower than men’s but they correspond still to full-time jobs, around 35 hours.

Here it is important to distinguish between reducing the number of working hours of full-time jobs from part-time work. Part-time jobs are faced with reluctance for being associated with “making the same amount of work in fewer hours” or to obstacles related to career progress, social security and job security (Torres, Haas, Steiber and Brites, forthcoming). Moreover, besides Britain, the Netherlands and Switzerland, we may observe that part-time employment for mothers is an exception among European countries and is profited only by mothers and in specific periods, when children are very small. Further, women in part-time working regimes are the ones who most complain about the division of household tasks, since partners of part-time female workers tend to assume that, as they have “longer free time”, they are expected to be responsible for the major burden of domestic work (Crompton, Brockmann and Lyonette, 2005).

## **2.2. CRITICISMS OF WORK-LIFE BALANCE**

There are two broad types of challenges that we will discuss in relation to the notion of work-life balance. These are related to first, the historical and contextual challenges to the work-life distinction, and second, the wide range of possible relationship between work and life that are not adequately captured by the notions of conflict and balance.

Discussions of balance imply a clear distinction between work and family,

which as Pahl (1984) argues is contingent rather than necessary. Indeed, by *work* people meant both the work of production and the work of reproduction (Pahl 1984: 20). The consequence of the capitalist style of work is the separation of work into maintenance of a special standard of living and into duties necessary to reproduction within the household. Work in the household became separated from that of the 'breadwinner'. People are socialized into the two newly born categories: work and family, which prescribe particular ways of behaviour. As a consequence of this segmentation, the responsibilities of the household are doubled, since it has to reproduce the labour power – which is in connection with the work – as well as the human resource of the society, which is related to the family's responsibilities (Pahl 1984: 327). Thus, *work-life balance* is in a sense an expression of a change in the meaning of the household. The function of the household as a provider of an appropriate standard of living has changed and while it remains the primary one it is now paralleled by a secondary organisation that is dedicated to a special – mostly economic – activity (Sik 1989)<sup>24</sup>. The degree to which this transition has taken place however varies across space and in some cases the boundaries between private and public, and formal and informal domains are so fuzzy as to make the distinction between life and work unsustainable<sup>25</sup>. Such are the cases,

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<sup>24</sup> The differentiation can be regarded as a rationalization in the sense of Weber (1982). Boulding raises the question of whether humankind will survive its rational development (Boulding, 1989: 76). According to him, the majority of the human production can still be regarded as part of the household, which is threatened with the rational way of production.

<sup>25</sup> According to Campbell (2000) people are daily border-crossers between the domains of work and family. Nippert-Eng (1996) argues that the boundary between home and work varies from the total integration of the two realms to the total separation of them; hence different people have different notions about work and home.

although not necessarily for the same reasons, of some South European (Trifiletti 2006) and East European countries (Stark 1992, Verdery 1994, 2000, Hann 2000).

When analyzing how Italian couples cope with paid and unpaid activities, how they try to balance work commitment and household chores and how they effectively manage professional careers and family ties, some acquainted models come to appear inadequate in the context of a complex reality where everyday life shows that couples orientations and working systems, social services and kin obligations are utterly at odds (Del Boca and Repetto-Alaia, 2003; Saraceno, 2003; Del Boca, 2002). For instance, take the case of the very low Italian female employment rate: one common explanation finds that the labour market is rigidly structured (Jiménez-Rodríguez and Russo, 2006) and pre-schooling services and structures are scarcely diffused or partially working (Bianchi, 2000; Saraceno, 1999). While the latter is certainly true, the former may result in part fictional when women aged between 30 and 50 years old are directly inquired by surveys: in fact, informal paid female jobs in the shadow economy are still widely pervasive and the labour market is more flexible and fluid than the regulative basis allow to suppose. The dominance of one-earner families in official statistics may disclose many one-and-half earner households in real life, at different levels of visibility and well-being. And it makes no big difference if dealing with Spanish term jobs or Italian semi-autonomous jobs, Greek seasonal tourist family firms or paid care-work everywhere. In particular, the relation Italian women use to have with paid work is one of the most blurred among European countries (Addabbo, 1999, 1997; Bettio and Villa, 1998). There is a multifaceted cleavage between the widespread aspiration to work on the part of Italian women, corresponding to their human capital and the difficulties or segregated

access they experiment when entering labour markets: as a matter of the fact, since 1997 and even more after 2001 the “inner circle” strictly regulated labour market is surrounded by a quickly growing halo of atypical jobs, from semi-legal to totally illegal status, to which mostly women and young people find access (Cébrían et al., 2000), but afterwards cannot exit in order to improve the career set of opportunities.

Thus the distinction between life and work can be interrogated historically in terms of the process of its normalisation, it can also be challenged in relation to the incompleteness and/or unevenness of the transitions, and to the diversity of contextual factors that may need to be taken into consideration. However, in addition to that, and in an interesting reversal, the normalised distinction between work and family has more recently also been challenged within the context of post-industrial restructuring where as Hochschild (2000) claims the relationship between family and work is better understood as a continuum, rather than as a boundary. Thus, although traditionally we tend to associate family with a more pleasant place to be, Hochschild, drawing on her study of an American company with a family friendly policy, argued that some employees emphasized that work can in fact be the peaceful escape from the tormented family life. The thesis of her book is that “the worlds of home and work have themselves undergone momentous changes over the last thirty years, while our ways of thinking about them have not”<sup>26</sup>.

When taken into the policy domain the distinction between work and family tends to become even more rigid, and work and life are imagined as two clearly

defined spheres of social reality (Hochschild 2000). If we take as an example the Italian context, we can argue that it is an extreme case of muddled boundaries between work and non-work, deeply rooted sub-national cleavages, high significance of the underground economy, different speeds of transformation of family forms in the North or the South. Further, it could be argued that the notion of reconciliation, rather than balance, is the more adequate conceptualisation of work and care arrangements within this context. Ignoring these complexities leads to oversimplified explanations that are far from inconsequential and have all too often been applied to Southern European countries, more generally. For example, assuming that “*familism*” simply collides with labour market requirements and explains the sub-protecting or “*rudimentary*” social protection (Gallie and Paugam, 2000; Leibfried, 1993) leaves unexplored and poorly understood the complex set of mechanisms, not dissimilar from other contexts (flux of interactions between actors, market, social services and family obligations), yet combined and contextualised differently, with different connexions and weights (Leira and Saraceno, 2002; Saraceno, 1997; Millar and Warman, 1996).

Different ways of being on the market descend from its deep segmentation: a less clear boundary between work and non-work is the consequence in which women’s work may assume many *different degrees of invisibility* (Kaplan Daniels, 1987). The early elaboration of the concept of “*double presence*” (Balbo, 1987, 1978) is a proof of such a deep intermeshing of the two spheres: double presence is not the same as “having a double workload”, but is intended as a *sensitizing concept* in order to catch up social change. It described how women have always been considered the job from the perspective of their family tasks and had by then defined work as the horizon of a very high quality level of

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<sup>26</sup> Moreover, a result that has been very consensual over decades of research on family field is that women who do paid work feel less depressed, think better of themselves and are more satisfied with life than women who do not do paid work (Hochschild 2000, Torres 2004)



family life and custody of children, irrespective of their actual occupational status. From this point of view, just as in other countries, they enter the labour market, even if conditions are not favourable, not by rational choice, much earlier than having adequate care services (Leira, Tobio and Trifiletti, 2005).

Hence, we have always to ask how *re-conciliation* of work and care is *socially constructed*, in different contexts; *which kind of substitute childcare* (at which level of quality deemed unavoidable) is *considered attuned to which intensity of workload considered acceptable by mothers defining themselves as parents-and-workers*. This conception of re-conciliation allows us to consider what is taken for granted in both directions (workload and childcare quality) as well as in the resulting ground level of the quality of family life which people still refer to (Trifiletti, 2006).

Coming back to our earlier discussion of work-life balance and work-life conflict, we can here add the notion of re-conciliation, which although not so advanced as the European work-life balance idea (Boje and Ejrnæs, 2007) can usefully complement it. Thus, while in the case of work-life balance it is the whole life cycle that is of interest (Moen and Han, 2001) work-life re-conciliation describes a much more episodic coping with problems and is only partially recognized in the public agenda.

Following Balmforth and Gardner (2006) we can further extend our conceptual framework by focusing on the positive aspects of the relationships between work and life. Drawing on Sieber's notions (Sieber 1974), developed further by Frone (Frone 2003, Frone et al. 1997), they suggest the notion of *facilitation* rather than *conflict*. Facilitation is understood as the positive mode of those skills developed at work having an influence on home life, while on the other hand, family-work facilitation refers to

support received at home which has a positive effect on work life (Balmforth and Gardner 2006:70)<sup>27</sup>.

Therefore, in conclusion, we argue here that the relationship between work and life is a complex one and focusing exclusively on the notion of work-life balance could be narrow and misleading. Indeed, as demonstrated above, there is a combination of rather different arguments related to historical change and contextual diversity that demand a more nuanced and conceptually rich theoretical framework that will address the continuities and discontinuities between life and work, particularly in relation to different aspects of informality. All these themes are relevant to the debates on flexibility and will be further addressed in the following selection.

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<sup>27</sup> Their main finding was that the two forms of facilitation and the two forms of conflicts were related to each other. This result suggests that in order to determine whether someone is, for example, satisfied with his or her job, it is necessary to have an understanding of the nature of facilities or conflicts, as these two kinds of patterns have the most important impact on employees' satisfaction.

### 3. FLEXIBILITY ON THE LABOUR MARKET

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#### 3.1. DEFINING WORK FLEXIBILITY

The notion of flexibility, although widely used in academic and policy debates, tends to be largely taken for granted (Wallace 2002a). This is in the sense that its meaning is rarely questioned while the direction of change is deemed unambiguous and unavoidable. Therefore, attempts to understand flexible working arrangements tend to focus on questions about how flexibility can be achieved and what could be its consequences within specific contexts, rather than on the different forms of flexible working arrangements that can be identified, and the specific contexts as well as the broader social mechanisms in relation to which they can be explained. Within this project we will focus on the latter set of questions, and will consider the direction of change as neither pre-determined nor unavoidable, in the narrow sense outlined above.

More specifically here, Wallace (2002a) defines a multidimensional pattern of the flexibility listing time flexibility, flexibility of places, flexibility of income and contract flexibility. Time flexibility refers to people working on a non-regular or irregular working schedule. The flexibility of places is defined by work not connected to one particular workplace, done either at home, or at an irregular place, or even abroad. The term of income flexibility is used to describe people who earn income from more than one source. Contract flexibility is characteristic of people not having a permanent regular contract.

However, while being able to distinguish between different forms of flexibility and observe the patterns of their occurrence (Wallace, Sik and Simonovits 2005) is an important first step it is also insufficient as it does not offer any

automatic insights into neither the structural environment within which they are formed nor into the motivations and orientations of the actors involved. Such an emphasis is even more important given our broader aim of understanding relationships between work and care where, as it was already pointed in the previous chapters and in the first part of this chapter, boundaries are complexly constituted and reconstituted over space and time.

In order to be able to explain the effect of flexible working solutions on the conflict between work and family, it would be necessary to develop a conceptual framework in which it is possible to arrange the scientific results of prior research regarding flexibility. Our starting point is the empirical and conceptual literature of work flexibility. However near our input is to empirical results, it is necessary to point out some more theoretical works in order to understand the trends behind these results. We summarise the findings of the literature by examining two questions: (1) *what is the nature of flexibility on the labour market*, and (2) *why do people choose flexible work arrangements on the labour market?* The work of Kalleberg (1992) is a useful entry point to the debates on work flexibility.

#### 3.2. EMPLOYMENT RELATIONS ON THE LABOUR MARKET

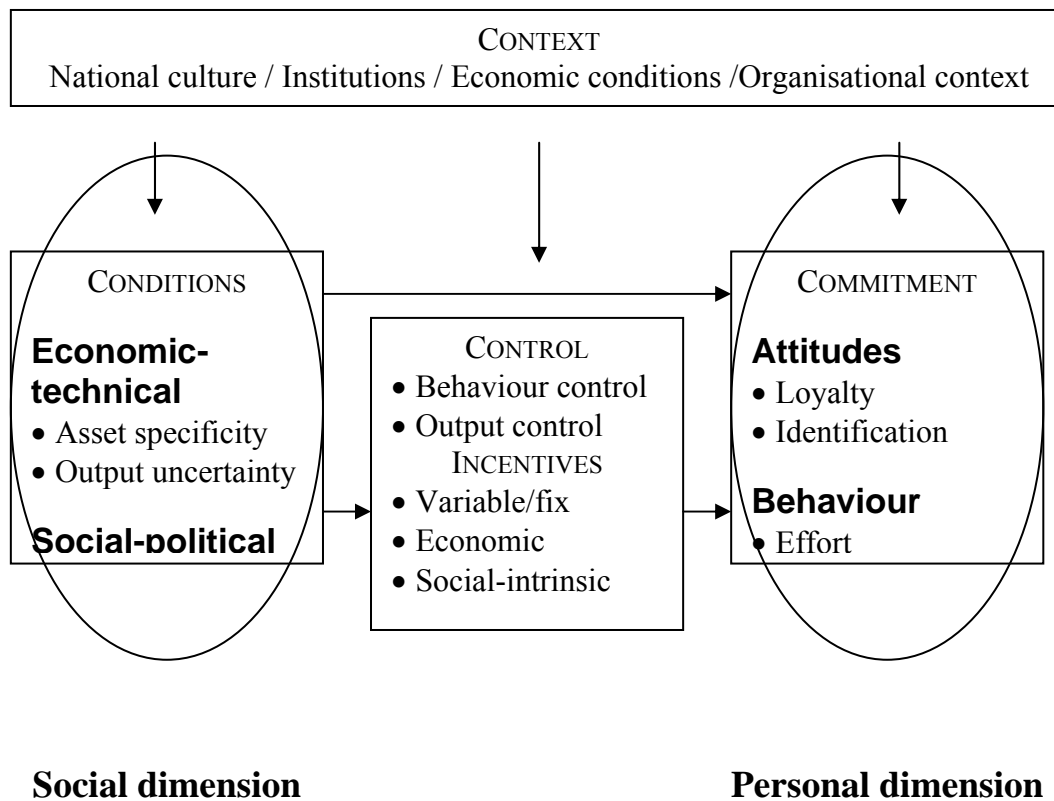
In his essay Kalleberg (1992) distinguishes two kinds of economic theories of employment relations criticising neoclassical economic theory. Employers and employees are at the centre of these theories. In the exchange between the two actors the theory assumes the employee to be a person driven by rational need. According to the neoclassical point of view the existing employment relations are the

most sufficient. There are many theories that are critical of this assumption, but the two most important are Transaction Cost Economics and the Agency Theory.

*Transaction Cost* theory argues that participants on the labour market strive to maintain their transaction at the lowest possible cost. *Agency* theory however assumes that one of the most important characteristics of the labour market is risk and uncertainty; hence the theory is concerned with the structural characteristics of contractual arrangements on such labour markets. Not all theories of employment relations are economic in approach, there are sociological

approaches as well: the political economic approach on the basis of Marx, and the institutional/authority approach on the basis of Weber. Both approaches view transactions on the labour market as more than economic activity, and give more weight to the social context.

Considering the above approaches, in order to obtain a complete picture of the nature of employment relations Kalleberg suggests we have to analyse the phenomenon from macro- (country, industry); mezzo- (organisation); and micro- (individual, job) perspective (Kalleberg, 1992: 198).



Source: Own construction based on Kalleberg (1992: 197).

If we intended to understand the nature of flexibility according to Kalleberg's model, we would have to analyse the social, political and economic context of the labour market, which is manifested in the organisational culture, and in such institutions as educational, legal or familial systems. These latter

institutions determine the conditions of employment relations, specify the possible control and incentive methods, and also have an influence on the participants' commitment.

The context influences the conditions, control and commitment

(Kalleberg, 1992). By conditions we understand mainly those circumstances that could be delivered from the structure of the society. These circumstances are usually the consequence of technical and economic maturity. The commitments stand in some contrast; although they are determined by context, they are usually driven by personal dispositions. Therefore, it is very useful to make a distinction between flexibility as a consequence of developing social conditions, and flexibility as adaptation of the individual to social conditions.

The last observation reflects a broader theoretical point made by Jessop (2001) on what he calls the structurally inscribed selectivity of systems. Jessop argues that specific structures tend to privilege certain actors, identities, strategies, temporal horizons, and in this case we can argue, working arrangements and flexibilities, over others. This however does not mean that actions are overdetermined by structures, but rather that they are structurally-oriented yet relatively open in terms of the specific strategies that they may adopt.

Following Jessop we can argue that there is a false opposition in discussions of flexibility in terms of unavailability and resistance. Thus, while flexible working arrangements may be privileged within the context of the post-fordist regime of accumulation, the nature and forms that these flexibilities can take is not predetermined, they are not exclusively negotiated within the economic domain, and are also open to the strategic and tactical adaptations of individual actors. The benefit of this approach is that it does not conflate structure and agency while allowing substantial space for openness on both sides. We can be more specific and try to use Jessop's work and the widely used work of Ulrich Beck in order to interpret, what could be deemed two different understandings of recent changes and the place of flexible working arrangements.

Thus, first, flexibility is discussed as a result of de-industrialisation and early globalisation in the sense of Castells (1996). Here flexibility can be regarded as a result of processes underway in advanced industrial societies and can be attributed to the new information and communication technologies. Hence, it is logical that this first approach to flexibility is connected to time flexibility and place flexibility. According to this interpretation, flexibility is a desirable process that benefits the upper levels of society, but the advantages of flexibility, it is hoped, will pass down to the lower levels of society. The philosophy behind such an interpretation is that with flexible working conditions people are released from social restrictions. As this approach is based on technology and technology is flexible by nature, flexibility is the necessary consequence of this technological approach (Piore and Sabel, 1984: 30).

The second approach to flexibility is the opposite of the first one. Here flexibility is understood in relation to defencelessness (in the sense of the Marxist meaning of the word) on the labour market. People are flexible in order to maintain an appropriate living standard. Because not everyone's full-time job provides enough for subsistence, people are expected to do extra-work. There are also people who are unable to hold a full-time job because of their mental, social, or health-related conditions: mothers having small children, or people with handicaps or disabilities. These groups of people have to be flexible, because they have to adapt to the conditions of the labour market. They do not behave flexibly because they represent the upper echelons of society; in some sense they are even at the bottom of society, they are members of marginal groups. From this approach flexibility is a more pernicious than desirable phenomenon, which is more an unintended consequence than an achievement of modernization.

The two possible approaches as well as the framework within which they are seen as contrasting accounts of flexibility are concordant with Beck's (2003) thesis that a deregulated labour market will lead to the "Brazilization of the West". It means that labour forces will become divided into two groups of employees. At the top of the skills ladder will sit those people who are mostly self-employed, and on the last rung of the virtual ladder will stand those people who are low-skilled or even unskilled.

However, following Jessop (2001) we can look at these processes as structured, path-dependent, co-evolving, and open ended. In this sense flexible working arrangements can be instituted differently, recognising and compromising to a different extent the interests and needs of employers, employees, families, etc. Thus, we can distinguish between flexibility being structurally privileged within the current stage of capitalist development and the very specific neo-liberal interpretation of flexibility where flexibility is linked to growing insecurity, the distribution of which, in turn, cannot be governed.

This distinction is important in re-interpreting the opposition between the 'unavoidability' and 'resistance' to flexible working arrangements as a false opposition presupposing the impossibility of governance. Instead we can ask: what are the different regimes of flexibility, how are they negotiated between different stakeholders, and what are the ways in which they are embedded in different institutional frameworks. To illustrate that further, we can look at discussions of different forms of inequality around flexible working arrangements. For example, Wallace, Sik and Simonovits (2005) distinguish between *high status flexibility* associated with better educated people and *low status flexibility* which is

associated with lower education<sup>28</sup>. This is also reflected in the work of Stănculescu (2003) who concluded that people with managerial occupations are more likely to have control over their work and behave like "architect[s] of their own future"<sup>29</sup>. In addition, drawing on data from Canada Barrett and Doiron (2001) distinguished between *voluntary* and *involuntary* part-time work and argue that involuntary part-time workers earn about 18 percent lower wages than voluntary part-time workers.

However, while these distinctions are important in terms of identifying new forms of inequality they do not necessarily imply unidirectional change. The significance of institutional arrangements, history and culture can further be illustrated by the diverse forms of inequalities experienced in relation to flexible arrangements, which will also depend on the definition of flexibility that adopted.

For example Štěpánková (2003) defines flexibility with the share of atypical working people compared to people who work in permanent, full-time jobs (e.g. part-time workers, people with fixed-term contracts, the self-employed, people with no labour contract, etc.). Applying this definition of flexibility the UK and the Netherlands are more flexible than Hungary, Slovenia or the Czech Republic; however in Romania and

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<sup>28</sup> Also associated with gender (male), age (younger or older), and locality (living in rural area).

<sup>29</sup> This is based on comparative analyses of seven European countries. Stănculescu (2003) also concluded that at the other end of the occupational ladder unskilled workers are also flexible, but this kind of flexibility is connected to informality and poverty. People – as might be guessed – with higher occupational levels are more likely to be satisfied with their work. But it may not be so obvious that people with higher-level occupations – in spite of the fact that these are the people who are likely to work flexibly – also experience time poverty and a higher probability of conflict between work and family life; while unqualified people – who also behave flexibly – do not suffer from such conflicts (Stănculescu, 2003: 33).

Bulgaria there is a greater degree of flexible work. Because of this evidence we can't speak about a divide between West and East within Europe. But we have to notice that the distribution of potential atypical works vary in the examined countries. The analysis indicates – using data from the UK, the Netherlands, Sweden, Slovenia, Croatia, Hungary, Romania, and Bulgaria – that in Sweden the majority of people are employed full-time and in Bulgaria the greatest number of people have atypical working arrangements.

Flexibility can be associated with different expressions of gender inequalities across Europe (Wallace and Sik 2003). In Western European countries mostly the women behave flexibly, because traditionally they have the opportunity to

balance between work and family; however, in the applicant countries and the new member states the men behave flexibly as women must chose between work and family and to find a balance between the two domains is difficult. We have to mention that flexibility is very vulnerable to the characteristics of labour market. The Swedish regulatory regime protects people from flexible working schedules, however the de-regulated labour market – for example in the UK and in the Netherlands – promotes flexible working schedules.

In the following two sections we will focus on some specific examples of empirical studies on the relationship between flexible work and work-life balance.

## **4. THE IMPACT OF FLEXIBLE LABOUR MARKET ON THE WORK-LIFE BALANCE**

### **4.1. WORK AND FAMILY INTERFERENCE**

Two alternative hypotheses can be formulated how being in a flexible work arrangement could influence work-life balance. These two hypotheses can be related to the double nature of work flexibility presented earlier in this paper. Rijswijk et al. (2004) review of the literature shows that long hours of work are associated with better physical health, lower levels of psychological distress and less anxiety, while part-time work exercises a negative effect on individual well being. (Rijswijk et al, 2004: 286) The same approach is supported by other studies pointing out that being in a part-time work negatively affects career and income prospects, especially in the case of women. On the other hand, working part-time can be seen as a possible strategy of individuals or couples to reduce work-family interference. Several studies from

the area of occupational psychology indicate that part-time work is associated with lower levels of role overload and work-to-family interference but has no influence on family-to-work interference (Rijswijk et al, 2004: 287-293)<sup>30</sup>.

Cardenas and Major (2005) focus their analysis of the conflict between work and life on a very specific domain: employment and breastfeeding. They regard the conflict between work and family in line with Greenhaus and Beutell (1985). They gather some empirical evidence from the resolution of the conflict between breastfeeding as a part of family-related duty and employment. What is most remarkable about their results and confirms the earlier thesis about the

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<sup>30</sup> While analyses in the field of occupational psychology face many problems, the most important of them being restricted validity, the depth of analysis allowed by this methodology brings important results that can facilitate research for larger social groups.

diverse forms and open-endedness of flexible working arrangements, is that flexible jobs cannot be regarded as a solution to the whole work and life conflict, in any general sense. This conclusion is further confirmed by Mattis (1990), who studying US companies, comes to very similar results to the ones quoted above<sup>31</sup>. According to her flexible work do not necessary result in a balance between work and life, partly because part-time employment usually incurs a reduction in career prospects, and partly because home-based employees encounter at home the tension originating from a merging of the roles of work and family (Mattis, 1990:139).

We can further support the above claims by further evidence that the impact of flexible working arrangements is different across Europe<sup>32</sup>. Thus, Arza, Rica, and Ugidos (2005) argue that in Belgium, Germany, Ireland, Italy and the Netherlands the available part-time work schedule has a positive impact on fertility, although in Denmark, France, Greece, Portugal, Spain and the United Kingdom the effect is negative. But we have to take into consideration that if the model is not restricted to workers the positive effect turns negative in Belgium, Germany and Italy. The results in Belgium have to be interpreted with care because the change caused by the small change in specification was not robust. Taking all these things together we can state that in Belgium, Ireland, and the Netherlands part-time working schedules have a positive impact on fertility. The result is very important because part-time work could be an arrangement for women to participate in

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<sup>31</sup> Her research consisted of in-depth telephone interviews with representatives from 47 U.S. companies, which were combined with data from in-depth interviews with 158 members from the involved work units.

<sup>32</sup> Part-time work is legislated differently among different countries, and there are also differences in labour market alternatives regarding part-time work (Arza, Rica, and Ugidos 2005).

the labour market and to care for children at the same time – however, in the majority of European countries part-time schedules do not allow women to take part both in the labour market and in family. This statement includes the assumption that if women have more children when they feel that they can manage both working and childcare. In fact, fertility was considered an indicator measuring the fit of the labour market to the family. As a consequence of the implication the persistence of children were compared in those families where the mother works full-time and in those families where she works part-time.

#### **4.2. DECISIONS ON WORKING ARRANGEMENTS: MAIN FACTORS**

While it is important to recognise the diversity of flexible working arrangements and the open-endedness of their impact on households across different contexts, this should not preclude us from identifying the key factors and mechanisms that are at work. Barnett and Lundgren (1998) for example present a conceptual model for explaining the joint decision of dual-earner couples to work less. Since they focus decisions to voluntarily work in a reduced working hour scheme, mainly among professionals and managers, the model is somewhat restricted for these purposes. (Barnett and Lundgren, 1998: 275) Couples have to take into account many factors during the decision-making process and each of them has needs, including biological, psychological and economic ones that have to be satisfied. These factors include macroeconomic, socio-structural and attitude factors (employment rate, living costs, age/gender expectations for success), workplace conditions (promotional policies, benefits, job security), as well as individual characteristics (age, gender, parental status, education, etc.). Based on all of these considerations, couples try to optimise their ability to meet their work and family life commitments. The model

also includes the term of fit, which is applied for the relationship between couples in this context. After a decision on their alternative careers, partners experience good or bad fit, which may lead to a reformulation of decisions. The authors point out that community resources (mainly available childcare) strongly affect fit for working parents. (Barnett and Lundgren, 1998: 280-81) Further, partners evaluate outcomes of alternative career decisions, individually as well as jointly. The goodness of fit is captured through quality of life indicators: job satisfaction, burnout, marital quality and psychological distress.

According to Tijdens (2002) and Tomlinson (2006) both macro and micro factors determine women's decision to reconcile work and family. Tijdens (2002: 76) aims to understand the nature of women's part-time work based on the data from the Second European Survey on Working Conditions. The author identifies four regimes of part-time employment as a starting point for explaining the part-time work pattern of the female labour force. Within the *gender roles regime* we may assume that women's part-time paid work is in connection with the presence of children, time dedicated to household duties, the person of breadwinner, education and age (Tijdens, 2002: 81). When we use, as a starting point, the *labour market regime*, we explain women's participation in part-time employment with the characteristics of labour force such as salary, working conditions, and occupation (Tijdens, 2002: 84). Using the *staffing regime* we regard part-time work to be explained with work, e.g. at unsocial hours (Tijdens, 2002: 87). While according to the fourth regime – *responsive firms regime* – part time work can be attributed to a response to the demand for less full-time working (Tijdens, 2002: 90). The research findings suggest that the gender roles regime is the best predictor of part-time employment of women in the European Union.

Above macro factors there are also micro factors that determine women's participation in part-time work. Tomlinson (2006) Based on the typology (Crompton and Harris, 1998) Tomlinson has distinguished six life-course trajectories in her 62 in-depth interviews with mothers employed in the hospitality industry in Britain. The *domestic trajectory* is characteristic for those women who made a transition between full-time and part-time work, and are not definitely orientated toward work. The *satisficer trajectory* fits usually those women who have made the transition between full-time and part-time employment, and are orientated toward work and a career, while in the *satisficer-future career* the orientation to work is only forthcoming. The fourth and fifth trajectories, *child-before-career* and *career-before-child*, are straightforward and require little explanation. The sixth trajectory is called *maximiser* and includes women who would like to combine the two realms: raising a family and developing a career. One of the main findings of the study is that the *career-before-child* is becoming more widespread due to the increase in the educational level of women in recent years. However, even young women with low educational levels are more likely to live according to this trajectory, which was characteristic of the older generation.

The six factors described in the above paragraph could be understood as personal characteristics, which have an influence on mothers' choices between work and family life. By understanding the factors as personal outlook, researchers are able to find them in discursive positions. Based on Elvin-Novak and Thomsson (2001), Guendouzi (2006) distinguish three narratives in mothers' daily conversations. Mothers in the sample were employed in a high school as full-time employees. The *accessibility* narrative suggests that a child is dependent on the mother and has to have direct access to her. According to the *separate spheres* narrative, a mother



should aim to achieve her personal needs. A third comprehension of the world manifested itself in the mothers' daily dialogue – called *happiness* – which means that the mother's happiness has an impact on the child's happiness, so the mother has to find a balance between the realms that are important to her.

Perry (1990) looks at women who are at the same point in their life cycle: namely after the birth of their first child with the intention to return to the labour market. His investigation is based on WES (Women and Employment Survey), which was carried out in Britain. He determines factors that have an impact on the decision between full-time and part-time employment. Those mothers are likely to work a full-time job whose child died, or who have been divorced, and the more qualified<sup>33</sup> and younger women are also

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<sup>33</sup> It is not obvious that having a higher education level means less participation in the part-time job. Analysing the ECHP dataset, Arza, Rica and Ugidos (2005) demonstrate that: "having higher education affects the probability of working part-

time negatively in Belgium, Ireland and the United Kingdom, positively in Italy and is not significant elsewhere." (Arza, Rica and Ugidos, 2005: 140)

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<sup>34</sup> Conelly and Kimmel (2003) analysed data from the Survey of Income and Program Participation (SIPP) in United States and concluded that mothers who are employed full-time are more likely to resort to centre-based care than those working part-time. The authors argue that a mother who has a child has to find equilibrium between working hours and childcare. In order to offset the number of hours worked, women employed full-time are inclined to resort to full-time care. Conelly and Kimmel identify three kinds of care: centre-based care, home-based care, and relative-based care. Of those who use each type, the people who have chosen home-based care pay for the majority of care. Relative-based care is the cheapest solution and is used mostly by single, employed mothers.

time negatively in Belgium, Ireland and the United Kingdom, positively in Italy and is not significant elsewhere." (Arza, Rica and Ugidos, 2005: 140)

## 5. CONCLUSION

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Analysing the nature of the conflict between work and family we were able to determine different factors that explained why achieving a work-life balance is a rare phenomenon. Inherited parental patterns of child-care, expectations and attitudes towards family life, time distribution and the characteristics of the labour market, all affect the nature of work-life balance. As we pointed out, these factors cannot be studied in a vacuum and cannot be easily discussed in terms of relative significance, as they are complexly inter-related and co-evolve within a variety of contexts. Thus, suggestions focusing on only one of those factors, such as for example suggesting that having another kind of labour market with more possibilities to work part-time would mean less conflict between work

and family, constitute oversimplified solutions to highly complex phenomena. Following the above example, characteristics of the labour market are dependent on a wide range of other factors, not least on people's attitudes regarding the distribution of work and family-related issues. Such recipe-like solutions are therefore inadequate.

The enormous complexity of the phenomenon however does not lead to a stark choice between overly simplified and thus necessarily inadequate accounts, on the one hand, or complex and thus highly context specific ones, on the other hand. Instead, it is possible to identify underlying mechanisms and processes that are at work in different environments (e.g. patriarchy, class) yet manifest themselves differently

in different contexts (e.g. there is no one single way in which gender inequality exists across societies) (Sayer 1992). However, even if this is taken into account

there still can be no single 'best solution' as this implies both normative and political questions that cannot be solved in any general sense.

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**SOCIAL, FAMILY AND LABOUR MARKET POLICIES:  
TYPES OF WORK-CARE ARRANGEMENTS**

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## 1. INTRODUCTION

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Balancing work and care has become an increasingly important theme in the European context as more women have entered the labour market in most Western European countries. The phenomenal amount of literature on the 'work-life balance' (WLB) in recent years reflects the perception that there is a basic incompatibility between balancing the demands of paid employment, in terms of career management and earning a sustainable income, alongside fulfilling caring responsibilities within the family. Most of the literature dealing with the 'work-life balance' comes to the same conclusion as Pascall and Lewis 'No Western European country has put women on equal terms with men: even Scandinavian countries have labour market divisions which put women at a disadvantage in paid work, and pensions, and discourage men's participation in care work' (Pascall and Lewis, 2004: 275). This conclusion might be even more the reality in the Central and Eastern European countries where the transformation since 1989 in several of the countries has threatened many aspects of the previous dual earner system and to some extent reintroduced the male breadwinner model in sharing the households' work and caring responsibilities. Based on these statements we want in this literature review to analyse the most recent development in 'work-life balance' policies to be covered by the WORKCARE project. The two related questions to be considered in the literature review are:

- How social, family and labour market policies are promoting flexibility in taking up paid work, unpaid work and care in household with small children and how it is influencing the gendered balance between paid employment and caring responsibilities

- How social, family and labour market policies are mediating the work-family relations and to which extent do these policies facilitating reconciliation between paid work, unpaid work and caring responsibilities between men and women in European households with small

The aim of WORKCARE project is restricted to an analysis of the households with caring responsibilities for young children below the age of 15 years (caring responsibilities towards dependent elderly people are not considered in the project despite these obligations might be of even greater importance explaining the employment strategies followed by women in Eastern and Southern European countries because lack of comprehensive institutional systems for elderly care). Our study of work-care strategies in the families will combine an overview of workplace flexibility and the gendered work-family relations in the different labour market / welfare regimes with more detailed studies of male and female strategies in the households and their impact on the work-family interface in a number of European countries.

A major issue related to the interface between workplace organisation and household strategies in combining work and care concerns the difficulties of parenting in the context of new forms of work and the increasing diversity of working time. The majority of families in the EU member states are now dual earners with all the multiplicity of demands and pressures that arise from combining work and family life. Policies to promote the reconciliation of work and family life, for example, childcare provision and parental leave schemes are extremely uneven across the welfare systems of the EU Member States. Such policies have to be scrutinised in terms of the pre-existing policy and



cultural frames in each country and the particular ‘gender order’ underlying the welfare state (Ostner and Lewis, 1995).

The WORKCARE project will highlight the public/private divide in analysing how individualisation and diversity in living conditions and public policies are influencing the different work-

family regimes. This perspective will be analysed by including several dimensions: trends in work place organisation, type of employment and regulation of working time, welfare policies aiming at reconciliation of work and family obligations, and strategies and preferences pursued by households and their members.

## 2. DIFFERENT KINDS OF POLICY

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The WORKCARE project will scrutinize policy interventions, especially since the late 1990s, at both national and EU level designed to tackle issues relating to the reconciliation of caring and paid employment. The role of policy-making at the EU level takes different forms (and operates under different constraints). Consequently these policies have to be evaluated separately and in relation to the national context. It is therefore particularly interesting to see how compatible and effective these new policies have been at improving conditions for combining work and care responsibilities in practice in the national or local context.

Considerable attention has in the WLB literature been given to the role of policy and attempts to evaluate its impact on employment relations, working time arrangements and family strategies. In this literature review we will primarily focus on three policy areas, which have had impact on the nature of the work-care relationships in the families and on the patterns of work take-up among men and women in the EU Member States. The three policy areas dealt with in this literature review are:

- Labour market and working time policies. The welfare systems differ in terms of how strictly the labour market and the working hours are regulated. Here we will primarily focus on policies aiming at balancing time for work and for caring: working time regulation,

flexibility in organising work and time

- Family policies including both different kinds of parental leave models and different kinds of childcare systems. Parental leave schemes differ widely in terms of eligibility, duration and benefit. Childcare system differs also concerning provision, types of childcare and governance of childcare.
- Social policies including tax benefit policy also have significant influence on whether it pays for parents being in paid work or caring for their children on full time. It also involves policy aimed at reintegrating parents into the labour force

The three policy areas are developed for different purposes and have different effects on the ‘work-life balance’ but they have together significant impact on the strategies followed by the household in reconciling work and care (Lewis 2001; Gornick and Meyer 2003; Haas et al 2006) First, a combination of employment and working policies, which might facilitate organisational arrangements at the workplaces and in the labour market generally such as flexible working time or leave arrangements that give employees a real choice in combining work and care. Second, care provision is essential as caring obligations are typically what keep people – and especially women – out of

paid work in all EU countries. Lewis (2004) has reviewed a range of care strategies in different countries ranging from institutionalised services to carer allowances and care accounts in terms of 'policy bundles'. She argues that there is not only one policy solution to such complex problems of managing time and care and who pays for it. Despite a situation where many countries are attempting to cut back on welfare provision, social care has remained a growth area over the last decades. Policy makers in several countries are increasingly aware of the need to reform these provisions, in particular in the context of increasing women's employment rate, but the strategies that are likely to be developed will clearly be affected by the existing policy frameworks and preferences, whether the problem is defined as a business issue, as for example in the UK, a private family problem, as tends to be the case in Germany, or a universal concern which has to be dealt with by the public, as is the case in the Scandinavian countries where paid parental leave and access to child care is considered as a social right. Third and finally, in some countries tax and other social policies, for example those related to parental leave arrangements and sabbaticals, clearly have an impact on the conditions under which people are capable of maintaining an employment relationship alongside their domestic care commitments.

The different policies are not necessarily internally consistent. For example, in the Netherlands labour market policies encourage the part time participation of women, whilst taxation policies encourage them to stay at home. In Denmark labour market, as well as social, policies are focusing strongly on full-time employment for both women and men but the family policies are insufficient in establishing equal conditions for women and men neither in taking up parental leave nor in provision of the needed amount of

child care facilities. Nor is there necessarily consistency between EU and national level policies. Thus, the EU tries to increase female labour market participation, whilst most New Member States have cut provisions for working mothers (Bruning and Plantenga 1999; Lewis 2002) Therefore we would not necessarily expect to find coherence between policies at different levels and in different welfare regimes.

The impact that different policies have on the labour market and on households is also contested. Thus, while it is widely accepted that benefits and legal provisions related to childbearing and childcare usually influence labour supply, especially female labour supply, intense debates have been taking place as to whether such policies can reduce or even change the negative effect of fertility on labour supply of women (Ahn and Mira, 2000; Engelhardt, Kögel and Prskawetz, 2001). The sign of influence may be positive or negative, depending on the design of the benefit or legal provision. For example, subsidised day care will lower the cost of childcare, and in turn the fixed cost of taking up work – so its effect on participation will tend to be positive. Cash benefits increase unearned incomes and hence may discourage participation.

A comprehensive analysis on impact of policies on female labour force participation is provided by Jaumotte (2003). The author examines a wide range of policy measures affecting female participation on the labour market in OECD countries: child benefits, childcare subsidies, tax treatment of the second earner, paid parental leave and tax incentives to share market work between spouses. Jaumotte used macroeconomic data that allowed the estimation of the aggregate impact of policies on labour supply. According to her findings, child benefits have a negative effect on labour supply, while other policies influence in a positive way the participation of women on the labour market. Childcare subsidies and

parental leave were found to incite full-time rather than part-time participation. The availability of part-time jobs increases female participation as well. A neutral treatment of second earners (relative to single individuals) also stimulates female participation. Similarly, Waldfogel, Higuchi and Abe (1999), in their comparative analysis including US, UK and Japan, found that extensions in maternity leave policies are likely to increase the employment of mothers after birth.

The role of tax incentives is usually regarded as significant in motivating participation. However, theoretical considerations as well as empirical results indicate that a more careful interpretation would be required. While at an individual level a clear positive effect on entering the labour force is predicted, those already in the labour market could reduce their working hours, depending on the amount of tax credit relative to their earnings. A more complicated decision-making process describes the situation of married couples, when the outcome is strongly influenced by the design of the tax system. Eissa and Hoynes (1998) examined the role of earned income tax credit (EITC) on women's participation in the US. Since the tax-credit is provided for families not individuals, an inverse effect was found for spouses. While the labour supply of men increased during the period in analysis (1984-1996), married women reduced their participation considerably.

Crompton and Lyonette (2006) focus on the role of policies in identifying factors influencing the balance between work and life using 2002 ISSP data. In the *Scandinavian* countries family policies target not only mothers but fathers as well, and the support provided enables fathers to partake in domestic work. The *French* system provides direct support to families with children and as a result the system helps mothers to take on full-time employment. In *Britain* the share of people

doing part-time work is large because the statutory regulation of employment is weak. However, according to the British government, the main political agenda is to reduce child poverty. Childcare services are mainly provided by the private sector. In *Portugal* a relatively high proportion of women are employed, but the welfare spending on families is low. The attitudes to household life are largely influenced by the ideology of the corporatist dictatorship and as a consequence are still traditional. According to Crompton and Lyonette's data on the work-life conflict, the country where the respondent lives is a significant factor.

A survey of legislative backgrounds in different countries supports this finding. Todd (2004) gathered the various statutes improving the work-life balance. In the *Netherlands*, in accordance with the *Adjustment of Hours Law* (2000), people can adapt their working hours to their social situation. People are able to work full-time when they are young, and after having children, they have the possibility to shift to a four days per week schedule. The *Work and Care Act* (2001) enables people to care for children and other relatives. In *Denmark* the period of maternity leave was extended and can be divided between the parents. In *Sweden* the parental leave after childbirth is 480 days (according to the law of 2002). It can be used flexibly till the child reaches eight years of age or completes the first year of school. In *France* the introduction of reduced working time (in 2000) and in *Belgium* the introduction of time credits helps people maintain the balance between work and life. Even in the *United States* the introduction of the *Family and Medical Leave Act* (1993) helps the working families to meet care-giving responsibilities.

Knudsen and Waerness (2001), comparing Great Britain, Sweden and Norway regarding attitudes to mother's employment reveal that differences

between countries have to be attributed to welfare state regimes to socio-demographic characteristics but also to *historical and national contexts*. That is what becomes very clear when comparing Norway and Sweden as other authors had already concluded (Leira, 1992). The differences within Scandinavian countries, in spite of sharing the same social democratic welfare state regime, have to be explained by specific historical national contexts. Moreover, this is also the case when we compare countries within southern Europe, as shown in the example of Portugal (Torres, 2006). Transformations in Eastern countries are another example of the need for drawing our attention to social and historical processes when comparing countries at a certain moment in time.

But for explaining differences between countries it is also necessary to access other kind of issues. Conjunctural alterations such as changes in the political direction of governments affect existing policies in both the area of family policies and that of unemployment. An example of such change is the alternation in the same country between social democratic/socialist governments and conservative governments, which makes it possible to introduce modifications in the direction and variations in the related effect. This is the situation in the United Kingdom, which, while maintaining a liberal model, has seen certain policy alterations in the areas that we have mentioned. Between the years 1995 and 2001 it was also the case in Portugal<sup>35</sup>.

It should be further noted that the assessment of the impact of policies is inherently more difficult in contexts where the distinctions between work and care,

private and public are less clear. This is especially significant for the Southern European and the post-socialist countries where rapid changes in the institutional framework of welfare states (Ferrera, 2005a; Jenson and Saint-Martin, 2002; Pierson, 2001) and the use of too rigid and schematic visions of welfare systems, labour market structures and family models may produce an oversimplification of the actual interlacing of work and family life (Saraceno, 2002). We need to develop a very rich conceptual framework and a more complex methodological approach in order to uncover the processes at work.

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<sup>35</sup> Between 1995 and 2001, a set of public policies was implemented in Portugal in the field of childminding and pre-school education. They partially filled a gap in coverage that was particularly obvious in a country with such a high employment rate among mothers of small children. There is still no public coverage, however, for the group of children aged 0-3 years.

### 3. WORK-CARE TYPOLOGIES IN THE WELFARE LITERATURE

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Much research on welfare states in recent years has tended to generate typologies, which create the impression of coherent policy regimes. Most typologies tend to reflect experience in North-Western Europe. Other countries are fitted into these typologies, but only with difficulty. The comparative welfare state research has developed a myriad of typologies based on welfare provision, labour market organisation, gender relations or caring arrangements. These typologies are often incompatible because their construction is based on different dimensions. A typology based on labour market organisation differs radically from a typology constructed on differences in caring arrangements. Furthermore, most of the literature dealing with the interface between work and family focus on the state-labour market relationship and on how to integrate women into paid labour and do not take into consideration the complex relationship between paid work, unpaid work and care (Lewis 1992 and 2002; Esping-Andersen, 1990 and 1999; Lister 2002). The weakness of state-market approach is, however, that it primarily describes women's socio-economic position and the impact of the welfare state policies on their employment conditions but fails to explain why the gendered division of paid and unpaid work and caring obligations has been so persistent in all European countries (Orloff 1992; Ellingsæter 1998; Pfau-Effinger 2004).

Lewis (1992) tries to synthesise the debate on national differences in Europe by outlining different types of breadwinner systems. These systems are combining the gender contract in unpaid care work and the employment contract regulating the gender relations in the labour market. Lewis distinguishes between three different types of breadwinner systems. The strong male breadwinner system

where the impact of motherhood is strong and reduces mothers' labour market participation markedly compared with non-mothers. The provision of childcare (at least for children under 3 years) is restricted or rather expensive, the parental leave is low paid or unpaid and the tax system favours the male breadwinner households. Germany and the UK are represented by this system. The modified breadwinner system we find in France and Belgium where we find generous child allowances for families with 2 or more children and comprehensive and cheap child care facilities for children. Mothers are able to choose between being full-time mothers or take up paid work at least when the child is more than 2 years. Finally, in the weak breadwinner system, which we find in the Scandinavian countries, a dual earner household is the rule and motherhood has even a positive impact on women's labour market involvement (Boje 2006). In all Scandinavian countries parental leave is well paid, access to childcare at low costs is seen as a citizen's right and taxation is individualised.

This typology of breadwinner systems has been modified and elaborated covering both Western and Central European countries. In the debate about welfare state models describing the work-care relationship two different approaches have been outlined. The structural approach, which is closely connected to the breadwinner typology, focuses primarily on women's position in the household and in the labour market and the importance of the welfare state policy institutions in establishing equality between men and women in the household and in the society as such. Recently this approach has brilliantly been outlined by Gornick and Meyer (2003) in their study of 'policies for reconciling parenthood and employment' in a dozen Western societies.

The cultural approach represented primarily by Pfau-Effinger (2004) argues that negotiations in the households and the decisions concerning work are not only a result of socio-economic and institutional factors but also highly dependent of norms, values and practices in the societies. Pfau-Effinger uses the term 'gender arrangement' to describe the complex interaction between cultural and institutional conditions in determining the different work-care models in Europe. Despite significant initiatives at national as well as European level in promoting a better balance between work and care obligation in the household the distribution of paid work, unpaid work and care is still characterised by the traditional gender contract and highly unequally divided (Pfau-Effinger 2004; Haas et al 2005)

Much effort has been used trying to combine the different approaches in analysing the complex interaction of gender relations in labour market, family and welfare state. One such attempt we find in Daly (2000) where she tries to construct a theoretical framework for studying welfare state variations as gendered in paid work, unpaid work and welfare by including in one single model three different principles describing the structure, process and outcome of the gendered processes in the society. These three principles are breadwinner model characterising the structure of the relationship, the familialisation/defamilialisation of the care responsibilities and citizenship specifying the resource-based relations between men and women (Daly 2000:36). Another attempt we find in Pascall and Lewis (2004) who are mapping the European welfare systems and their labour market and social policies in relation to gender equality across a variety of key dimensions characterising the gender regime. These dimensions are paid work, care work, income, time use and voice. In advocating for this model they argue "*that gender equality policies have been limited in*

*effect, because they have addressed part of the system rather than the whole ... But gender regimes are interconnected systems through which paid work is connected to unpaid work, state services and benefits are delivered to individuals or households, costs are allocated, and time is shared between men and women in households, as well as between households and employment. If gender equality policies are to be more effective in delivering equal treatment, in paid work and welfare, they need to address the interconnecting elements of gender regimes as systems, with a logic of gender equality in care work, income, time and voice, as well as in paid employment"* (Pascall and Lewis, 2004:379-80)

The 'Work-Life Balance' literature illustrates clearly some of the inconsistencies and weaknesses of existing welfare arrangements in comparing the different welfare systems, albeit that the nature of these problems varies between societies. In another approach to revising the welfare typologies and to solve the problems mentioned previously a comprehensive debate of the concepts used to analyse welfare states in the past has taken place. This has led to questioning the usefulness of concepts such as commodification and decommodification; defamilialisation and refamilialisation (e.g. Daly 2000; Esping-Andersen 1990 and 1999; Saraceno 1997).

The importance of care provision is recognised by the welfare states, but it has seldom been considered as part of the basic needs of the citizens. Care giving and care receiving were supposed to be provided by family and social network rather than by the welfare state. This is no longer the case considering the large proportion of women who has taken up employment. Therefore the concept of work completely internalised in the male concept of citizenship defined according to Marshall's definition of social citizenship does not hold any longer. For women the traditional conceptualisation of social rights has led to

a complicated dilemma between their caring work in the family and their search for independency through labour market participation (Knijn and Kremer 1997; Lister 1997 and 2002). To solve this dilemma and to conceptualise the relationship between work and care numerous scholars have recently proposed that the concept of decommodification has to be replaced and/or supplemented by the concept of re- / defamilialisation (Leira 2002; Lister 2002; Saraceno 2004). Defining social rights alone according to the level of decommodification as done in the traditional welfare typologies gives too high a priority to paid work in conceptualising citizenship rights. Therefore the concept of familialisation / de-familialisation has been introduced. Lister defines defamilialisation of social rights as “*the degree to which individual adults can uphold a socially acceptable standard of living independently of family relationships, either through paid work or through social security provisions*” (Lister 1997:173). The inclusion of both decommodification and defamilialisation in defining social citizenship rights implies that paid work no longer has the privileged status compared with unpaid work and care. The context of de-familialisation is crucial to understand the welfare of individuals and families, and also to determine the extent to which social provisions through welfare programmes may have altered the balance of power between men and women and between dependent and non-dependent within

families (Maclaughlin and Glendinning 1994). Furthermore, this also means that the goals of family policy have to be formulated in a way that allows families and the individual family members to develop their own strategies in assuming family responsibilities and caring obligations (Orloff 1997; Lewis 1997; Saraceno 1997).

In the WORKCARE project we are interested in asking what specific types of policies have been introduced to promote work-life balance in the EU Member States since the mid 1990s. What was the rationale for introducing these changes? Who promoted them and how did they come about? How effective have they been? What could be improved? What other kinds of policies shape the employment situation of carers? Do carers have access to formal paid (state) institutions of care or private ones? Do they get “cash for care”, how much, and for what period of time? How do policy measures encourage a particular type of household organisation in the combination of work and care? A particular focus will be upon how the New Member States have managed the transition from state-sponsored official childcare policies to new kinds of work-care balance. Hence, we want to analyse policies at three different levels: old EU countries, where policies are already quite well documented, New Member States where there is much less analysis, and the EU level.

#### **4. WELFARE STATE REGIMES, POLICIES AND HOUSEHOLD AND WOMEN’S STRATEGIES**

Several other studies reassert the relevance of welfare state regimes and of policies for orientations and work care arrangements differentiating countries. The three-regime typology of Esping Andersen enabled Gornick and Meyers (2004) to map differences between countries: *social democratic* countries policy packages

support a dual earner/dual carer society, that is, a gender egalitarian society that values both paid work and caregiving time and prizes child well-being; *conservative* European countries help to secure time for caring and family economic stability, but they are less encouraging gender equality in paid and unpaid work; finally, *liberal*

countries (UK and US) public policy supports are minimal, they defend a market solution to secure care, and men and women are at the mercy of labour market rules (employers).

Gornick and Meyers also stress that the progress towards the goal of an earner-carer society, with greater gender equality, child well-being, and family economic security, has been best achieved in countries that have developed the most supportive packages of leave and working-time policies (Gornick and Meyers, 2003). It is not only policies that moderate family poverty by facilitating employment and employment related income; but also, father's relative contribution to family child care rises with the strengths of family leave, child care, and working time provisions (Gornick and Meyers, 2003).

More recently, Esping-Andersen (2002a) himself, having as background concern the sustainability and reform of the welfare state, proposes a "child well being centred policy" (Esping-Andersen, 2002b) and a "new gender contract" (Esping-Andersen, 2002c). This proposal stresses that public policies for the family are about regulating the labour market in a way that women and men can be both workers and carers enhancing child well-being in a gender egalitarian context. However, some tensions can emerge between child well-being policies and gender policies: the former implies more free time for child care and less time for the labour market; the latter, depends on a progressive equality between women and men in the labour market and on the involvement of men in care and household tasks.

The importance of *institutional context* in affecting women's employment patterns is also underscored in other studies: first, differences in *public arrangements* supporting the employment of mothers explain cross-national differences in the impact of children on women's labour supply (Uunk, Kalmijn and Muffels, 2005). Second, women's

employment permanence is highest among countries in which the state provides support for working mothers. At the same time, lower support for working mothers' employment is associated with higher wage penalties to employment discontinuity (Stier, Lewin-Epstein, 2001). Both public policies and gender role values impact in women's labour market, although public policies have a stronger impact, namely those promoting public childcare. Commonly gender values have a mixed role: more egalitarian values positively affect women's labour supply; but gender roles do not change the impact of institutional constraints. Changes in gender norms may underlie institutional changes rather than the other way around (Uunk, Kalmijn and Muffels, 2005).

Leitner and Wroblewski, (2006) show also that Nordic countries are a good example to understand that the consistency of *welfare state regulations* and a correct *policy mix* are important preconditions for a successful work-life balance; meaning also that a transformation of the institutional conditions may lead to changes of the prevailing norms, values and orientations to work and care.

Erikka Oinonen comparing Finland and Spain found out that the differences between the first - with high rate of mother's employment and high fertility rates - and the later - with low female employment and very low fertility rate could be explained by the existence in Finland of policies targeted to reconcile work and care. It is not only stability in working situation of both mothers and fathers in Finland that seems to appear as the key factor for fertility and first family formation but also "the precarious employment situation and low income level has not prevented young [Finnish] people from leaving home to live either alone or with a partner" (Laaksonen, 2000 in Oinonen 2004). This is largely due to the individual social security system, the financial aid system for students, student housing and housing allowance". Whereas



in Spain, with no policies supporting mother's employment, reconciling the wish to work and maternity seems more difficult. This might help to explain the low rate of fertility but also some contradictory or coexisting results between *modern* orientations to work and *traditional* orientations to care as happens also in Portugal (Figure 3).

Also for Spain, Constanza Tobio (2001) raises our attention for the different *strategies* women develop in a context where they want at the same time work but in a context where articulation between work and care is still considered "their" private problem. In these conditions, orientations to work have to be adapted to the specific constraints like the existence of family support or might influence their

fertility strategies (postponing maternity or having only one child).

In spite of the complexity of factors explaining fertility strategies and behaviour, several studies point out a positive correlation between women's employment and fertility rate in some countries. They have shown that the development of *policies* aimed at increasing women's participation in the labour market and, simultaneously, a set of measures to improve maternity and infancy/childhood support may be the basis of both the relative recovery in fertility and the retention of mothers in the labour market (Del Boca and Locatelli, 2003; Oinonen, 2004; Klement and Rudolph, 2004; Therborn, 2004; Torres, Mendes and Lapa, forth coming).

## 5. WORK/FAMILY RECONCILIATION MEASURES AT THE EUROPEAN UNION LEVEL

By the 1990s, dramatic labour market and family change had resulted in a series of demographic, economic and fiscal challenges to the welfare state systems built up by member states (Esping Andersen, 1996; 1999; Ferrera and Rhodes, 2000; Iversen and Wren, 1998; Pierson, 2001), together with the substantial erosion of the male breadwinner model family at the household level, making it untenable as a set of assumptions underpinning policy (Lewis, 2001, 2002)<sup>36</sup>. It is possible to trace growing EU concern to push Member States to address these challenges, particularly the problem of unemployment and labour market participation rates, and the perceived need to 'modernise' social protection systems. Certainly, in late twentieth and early twenty-first century Europe, employment became the major

preoccupation of social policy (in order to secure the viability of the work/welfare relationship) and economic policy (in order to promote competition and growth). The growing willingness to address family care issues insofar as they impinged on labour market participation, especially of women, was as much a part of these considerations as the equal opportunities agenda (Stratigaki, 2004).

This raises the following central questions for our project: first, does the growth of attention to work/family reconciliation policies represent, as Hantrais (2000) has suggested, a real shift towards policies to tackle socially constructed inequalities and in particular to promote a more equal sharing of paid and unpaid work between men and women, or provide an indication of the extent to which equal opportunities policies are now harnessed to an economic agenda (Rossilli, 2000; Stratigaki, 2004)? As Mazey commented in an article published in 1998 - the point at which major changes were taking place in equal opportunities and

<sup>36</sup> This section is based on a draft provided by professor Jane Lewis, Department of Social Policy, LSE

work/family reconciliation policies - the changed economic and political climate left '[gender] equality policies at a critical juncture' (p.148). Second, we must investigate the significance of the shift in terminology that can be detected in EU level documents, from the use of 'work/family reconciliation' to the use of 'work/life balance'. The latter has tended to be used in the US literature in work on the level of the firm (e.g. Rapaport *et al.* 2002) and has been employed more generally in order to address a dual policy agenda of improving workplace performance and pursuing gender equality (see also Guest 2001). Finally, we will endeavour to explore the relationship between work/family and/or work/life policies in relation to the development of EU social policy development and the European Employment Strategy. The European Commission has tried to harmonise and equalise the access to jobs and the working conditions for men and women through a variety of directives. Legislation to outlaw sex discrimination and to ensure equal pay has been implemented in all EU Member States but in several parts of Europe this legislation is more a political aim than a reality considering the differences in employment rates for men and women and the gender wage gaps which exist in most jobs and in the labour market as a whole (Plantenga & Hansen 1999; Kremer 2006)

In addition to these more general directives regulating the access to jobs and the working condition the European Commission has also introduced directives aiming at a better reconciliation between work and family obligation. In 1992 a *European Council Recommendation on Childcare* was issued. In this directive the Council tried to formulate principles for care services, leave arrangements and men's participation in care. This recommendation was in 1996 followed by the *Parental Leave Directive*, which stated the common principles for the European policy on early childhood. The right to

maternity and parental leave for all parents and public support for working parents were the main issues. Women are entitled to minimum 14 weeks maternity leave. Women are protected from being dismissed according to the directive. Both men and women are entitled to minimum three months of parental leave. The directive enforces member states either with law or with a collective agreement to secure employees from dismissal after the leave period (Council Directive 96/34/EC).

Flexibility in the work-care relations and equal condition concerning work and pay for part-time and full-time job were the principle aims of the *European Directive on Part-Time Working* from 1997. Part-time work has normally been considered as flexible non-standard work. Part-time workers are often disadvantaged in comparison with regular full time employees. Often they have lower wages, they are not eligible for certain social benefits and they have worse working conditions than regular full time workers. In order to reduce this discrimination between part-time and full time workers, EU law provides protection for part-timers in terms social benefits, pension rights, maternity leave, and working conditions (Council Directive 97/81/EC).

In addition to these directives the European Commission has also tried to regulate the working hours by setting a limit on the weekly working hours. The *European Working Time Directive* set a maximum of 48 hours of working per week. The arguments for this maximum are to give men time for care and women access to paid work despite the caring obligation. All the EU recommendations on the work-care relationship are relatively weak and are primarily implemented by the Open Methods of Co-ordination. Furthermore the purpose of most directives seems more to facilitating women's access into paid work than forcing men to take their part of the caring obligations nor to ensure an equal division of paid work,

## 6. WORK/FAMILY POLICIES ON THE NATIONAL LEVEL

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Most of the policies which have influence on the balance between work and care are formulated and implemented at the national level. Yet through consultations between the EU Member States applying the Methods of Open Coordination we find a growing convergence on the policy level in the different types of policies of importance for the 'work-life' balance of European citizens.

### 6.1. FLEXIBILITY AND EMPLOYMENT REGULATION

The flexibilisation of the work organisation and the changing working time regimes have been analysed extensively but mostly in narrow national case studies and a few large-scale quantitative surveys. In understanding flexibility in a broader context we have to take into consideration the complex set of social and economic institutions surrounding the work, employment and family. Rubery (1989) has identified a framework that structures the relationship between the employment system, the system of social reproduction and flexibility in work and care. Among the different components having impact on flexibilisation she highlights the system of social reproduction which includes how childcare provision, systems for leave and well as the structuring of families. Given that the family is the principal site for social reproduction it is in the interrelationship between household organisation, employment relation and welfare system that the flexibility regime has to be evaluated.

Much information is available about the demand for flexibilisation put forward by the firms while we have less knowledge about the needs for and the

consequences of flexibilisation from the perspective of the employees. At the general level flexibility is in the labour market literature defined as the capacity of firms and workers to adjust to changes (OECD 1989:13) This capacity means greater ability and readiness of firms as well as individual workers to respond to the fluctuations in demands caused by growing international competition as well as in adapting to the changing technologies and consumer preferences (see Boje and Grönlund 2003).

The inter-relationship between labour market flexibility and social protection has played an increasing role in the scientific debate on the future trends of the European welfare models and in how to pursue the employment policies. This debate about how to combine social protection with flexibility - the 'flexicurity' debate - is highly important considering the 'work-life balance'. The flexicurity model focuses on three different elements in a work-care perspective: level of job/employment flexibility, the generosity of the welfare system and an active labour market policy aiming at upgrading and matching the labour force to the new jobs in the labour market. The Danish or Dutch labour market is seen the prototype of the 'flexicurity' model but they are different in the strategies followed in pursuing flexibility. The Danish 'flexicurity' system is characterised by, on the one hand, a low protection against dismissals, and working hour flexibility is primarily decided at the individual workplaces and, on the other hand, a universal welfare state provides social protection, rights to leave and access to childcare facilities that enable parents to combine work and family responsibilities. In the Netherlands we also have a generous universal welfare system but here both

working time and employment protection are closely regulated through tripartite negotiations (for more detailed discussion of the 'flexicurity' literature see Sarfati and Bonoli 2002; Wallace 2002; Kok 2003; Madsen 2006).

In the literature about working time arrangements it is debated whether women prefer part-time work in order to create a better balance between work and care or whether they are in fact forced to take part-time because of lack of child care facilities (Wallace 2003:13). On the one hand, standardization of working time has strengthened the workers in their fight for a regulated and normal working day but, on the other hand, it has been argued that the criteria for regulating the working hours have been settled based on norms prevailing in the Fordist type of production – male, skilled full-time workers in manufacturing (Hinrichs, Roche and Sirianni, 1991). With growth in the service sector employment and still more women in gainful employment, working time preferences have generally become more diverse (Meulders, Plasman and Plasman, 1997). We know from other studies – both national and comparative – that women want to work even if the return is low but they also want flexible work schedules, comprehensive periods with leave for care in addition to high quality child care (Wallace 2002 and 2003b). In a survey carried out by the European Foundation in Dublin, families were asked which kind of employment pattern they prefer. It was found that the large majority of European couples outside Scandinavia want the 'one and a half adult worker' model while the Scandinavian couples go for the 'individualised adult worker' model with both father and mother in full-time

employment. These results can be explained by considering the prevailing family / caring policies and working time regimes in the four countries (OECD 2001)

Flexibility in the work organisation and in work schedule it is often seen as an opportunity for both women and men to handle the conflicts between work, care and family obligations, but this is only the case if flexibility is controlled by the employees and not imposed by the firms. Asking employees who are making the decisions on the number of hours they work it is clear that a larger proportion of men than women in all countries decide themselves the length of working hours and how they are scheduled (Wallace 2003b: 190-91). A recent Swedish study of flexibility and gender based on detailed interviewing of both employers and employees confirms this result and finds that it is primarily the male-dominated types of flexibility, which are controlled by the employees and not the female-dominated types of flexibility (Grönlund 2004)

A central and related question is how different labour market regulations influence the employees' possibilities to choose their working time. Time related policy (flexible working arrangement and part-time job) depends on both the general labour market policy and on the industrial bargaining outcome. Countries differ in terms of how strictly the labour market and the working hours are regulated. In table 1 we have for the countries included in the WORKCARE project described their labour market system in relation to employment regulation, flexibility work schedule, access to leave and social protection.

**Table 4.1. Labour market regulation among countries covered by the WORKCARE Study**

	Denmark	UK	Sweden	Austria	Italy	Hungary
Labour market regimes (Gallie & Paugam 2000)	Universal social protection	Liberal-minimal social protection	Universal social protection	Employment-dependent social protection	Incomplete social protection	Employment-dependent social protection
Flexibility regime (Wallace 2003; Madsen 2006)	Flexicurity	De-regulated or partial regulated flexibility	Regulated flexibility	Partially regulated flexibility	Regulated non flexibility	Regulated non flexibility
Regulation or collective agreement of part-time	Change in working hours is agreed on by employees and employers	Change in working hours is agreed on by employees and employers	Parents are entitled to reduce working time up to 25% until their children are 8 years old	Rights to part-time for parents with small children	Employers receive state incentives to offer part-time employment opportunities during the leave	Part time employment not popular because of high taxes and high social contribution
Access to leave, and social benefits	Full social right	Restricted social rights	Full social rights	Dual system of social rights	Dual system of social rights (Regional differences)	
Part-time under leave period	Part-time is not possible when receiving leave benefit	Part-time is not possible when receiving leave benefit	Leave can be taken as 25%, 50% and 75% or full time	Part-time is possible when receiving leave benefit	Part time is possible when receiving leave benefit	Part time is not possible under leave period
Status of part-time work	Regular	Non standard	Regular	Regular / non-regular	Non standard	

Sources: OECD 2002; OECD 2003; OECD 2005a

The UK and to some extent also Denmark can be seen as a deregulated or partially regulated flexibility regime (Wallace 2003). Working time and employment conditions are primarily determined at the individual workplaces (OECD 2002, OECD 2005). Comparing with other countries Denmark has one of the least regulated and most flexible labour markets and is more similar to liberal welfare state than to the rest of Scandinavia. But there are also marked differences between Denmark and the liberal welfare systems. In the UK we find very few restrictions for employers employing workers on low wage and short hours. If employees are low paid or in part-time jobs they are not eligible for social security and the employers are not entitled to pay social contribution (OECD 2005:214). In addition to this women are often forced to take up the low paid part-time jobs after maternity leave because of

insufficient paid leave and lack of childcare facilities. In Denmark the employees are more protected by the collective agreements and part-time workers have the same social rights as full-time workers and mothers are encouraged to take up full-time jobs after having been on parental leave for about one year

In other countries like Sweden and the Netherlands, working hours are determined by collective action. Flexibility in Sweden and the Netherlands are mainly employee-led and can be labelled as a regulated flexibility regime (Wallace 2003). In the Netherlands employees have a right to change their working hours between part-time or full time depending caring responsibilities in the family. The working time flexibility is controlled by the employees. Employers can only veto if they can prove that it is impractical or solvency-threatening (OECD 2002:185). In countries like Finland and Sweden

legislation encourages parents to reduce working hours. The Swedish legislation allows Swedish parents to reduce working hours up to 25% until their children are 8 years. Another family-friendly element in the Swedish system is that employees do not lose their social rights by working part time and this can be combined with paid parental leave (Almquist & Boje 2000).

In Hungary part-time work is not very common. According to Medgyesi (2003), this has historical explanations. In the former socialist economy the only group, which could achieve part-time jobs was pensioners. Today part-time employment is not popular for either the employers or the employees. For the employer, part-time is not popular because the social security contributions and taxes are so high that it is too expensive for employers to hire part-time workers. For the jobseekers it is more payable not to leave unemployment benefit than working on part-time (Medgyesi 2002:145). This type of labour market regulation can explain why Hungary has the lowest proportion of part-timers.

Despite recent changes in employment protection towards a more flexible employment system Italy is still a highly regulated labour market in terms of strict hiring and firing rules and high entry wage. At the official labour market flexible working hours are also rather unusually in Italy. Traditionally both the labour unions and the employers have been opposed part-time employment – Trade Unions have been opposed to part-time employment because they fear that this might reduce workers' rights. For the employers part-time jobs have not been popular because of social contribution paid by employer are proportional with the numbers of employees. Two part-time workers are therefore more costly than one full time worker (Del Boca 2002:6)

The variety in working time regimes as well as in access to leave and childcare facilities in Europe means that 'solutions', such as part-time work, are not always the

desired solution to solve work and care conflicts for particular households in different societies; nor may individuals be in a position to take advantage of these options either because they are not able to support themselves economically by taking up part-time jobs or because employers are reluctant to use such contracts. The part-time solution as well as other types of flexible employment arrangements are very much dependent on how the different types of atypical employment are regulated, as well as the system of social protection for families with children – leave programmes, childcare etc. (O'Reilly et al. 2000; O'Reilly and Fagan 1998).

## **6.2. WELFARE AND CARE**

In the comparative welfare research social care and how it is provided has become a still more important concept. As long as the male breadwinner model prevailed in Europe there was no need for providing external care of dependent children nor elderly citizens and the conflicts between care and work responsibilities were not high on the social policy agenda. Since the early 1990s closely connected to the influx of women into gainful employment the demand for maternity and parental leave as well as for external child care facilities have been growing in all European countries.. This demand has at the EU level been materialised in several recommendations / directives to the Member States – in 1992 came a recommendation on child care (92/241/EEC) and in 1996 the Directive on Parental Leave (96/34/EC) was approved. In this section we shall shortly describe the national criteria for parental leave and childcare in the countries covered by the WORKCARE project.

### **6.2.1. Parental leave policy**

All the EU member States have some kind of legislation providing maternity / parental leave for working parents. The EU

directive on parental leave has obliged the Member States to introduce legislation on maternity / parental leave, but still we find huge differences between the countries in terms of eligibility, duration, benefit levels and flexibility in taking up parental leave. In some countries legislation on parental leave was first introduced after the EU directive came into force. This was the case for the United Kingdom, Ireland and Belgium where parental leave legislation was implemented in 1998 or 1999.

#### *Eligibility to parental leave*

In most countries parental leave is organised as a family right meaning that the parents can decide who will make use of the period of parental leave. This concerns Denmark, Portugal, the UK, Austria, and Hungary where only a restricted period of paternity leave are reserved for the fathers. In UK all working mothers are entitled to a leave period, but parental payment depends on the working history. In Austria and Hungary the system of parental leave are divided in two separate schemes; an employment protected leave and a childcare benefit, which has a lower level of compensation. The employment protected leave schemes covering all employees with a sufficient work record. The childcare benefit in Austria covers all parents whose annual income is below an upper limit (OECD 2004). Given the inequality in labour market affiliation and income between men and women it will in the overwhelming number of families be the mothers who take parental leave, which further exaggerates the gender inequality.

In a few countries parental leave is organised as an individual right for both parents meaning that it is not possible to transfer the right between the parents and if one parent – typically the father – does not take the parental leave it will be lost (Bruning and Plantenga 1999:196-200). The right to parental leave is individualised or there exist a mixed system in Sweden, the Netherlands, Greece – and Iceland.

Iceland is the only country that has fully individualised parental leave. Each parent has 3 months of parental leave and additional 3 months to share.

In Sweden all parents are entitled to income support regardless of their employment status. To secure gender equity 60 days are exclusively reserved for the father in Sweden but only about half of the fathers take up the full period. To encourage fathers' childrearing responsibility it has been suggested in Sweden and elsewhere that the parental period should be equally divided between the parents. In all EU countries the take up of parental leave is very unequal between mothers and fathers. Even in Sweden with the one of most gender-balanced system in the EU it is primarily the mothers who take parental leave and the Swedish fathers do not even make full use of their right to paternal leave. In Sweden mothers take as much as 85% percent of all parental leave (Economist 2006).

#### *Compensation / payment during parental leave*

Another crucial dimension determining the take up of parental leave is the generosity of payment under periods of leave. Today all EU Member States have some kind of payment during leave but again with huge variations. Denmark and Sweden have probably the most generous systems. A large proportion of the Danish and Swedish parents taking up parental leave got full salary compensation during the first year of parental leave with 80 / 90 per cent up to an income ceiling from the social security funds. The social security payment is typically supplemented by employers' payment up till full salary compensation. In the UK and Austria the compensation is high during the first weeks (maternity period) but then very modest typically forcing the mothers to take up part-time very early or being full-time carer relying on the male breadwinner. British working mothers thus

receive only 25 per cent of the average income after the first 6 weeks.

**Table 4.2. Programmes for maternity, paternity and parental leave in the countries covered by the WORKCARE Study**

	<b>Denmark</b>	<b>UK</b>	<b>Sweden</b>	<b>Austria</b>	<b>Hungary</b>	<b>Italy</b>
<b>Maternity</b>	18 weeks (4 months)	26 weeks paid leave (6 months) 26 weeks (6 months) Additional maternity leave unpaid	2 months	16 weeks (3,5 months)	24 weeks (5,5 months)	5 months
<b>Parental leave</b>	32 weeks (Family based) (7,5 months)	-	480 (16 months) 240 days for each partner	30 months or 36 if the father take 6 month	36 months	10 months
<b>Paternity leave</b>	2 weeks (0,5 months)	2 weeks (0,5 months)	2 months	6 months	-	Parental leave is extended to 11 month if the father take 3 months
<b>Total child leave period</b>	52 weeks (months 12)	54 weeks (12,5 months)	480 days (16 months)	Employment protected leave: 2 years 3 years with funded benefit	Insured women 2 years Uninsured women 3 years after birth	16 months
<b>Beginning and end of paid leave period (flexibility)</b>	-4 weeks; 9 years	-8 weeks; 3 years	-8 weeks; 8 years	Each parent can postpone three months of the entitlement up to the child seventh birthday		-4 weeks; 9 years
<b>Leave payment</b>	Parent have right to 52 weeks unemployment benefit ca 90%	90% for the first 6 weeks and 154 Euro for the next 20 weeks	80% for the first 390 days, 90 days flat rate SEK 60 /day	The first 16 weeks of maternity leave 100% compensation Child care benefit. EUR 426/months	70% for insured women in the first 3 years, thereafter flat rate. For uninsured women a flat rate payment equivalent to old age pension	80% for 5 months maternity leave (paid by the employer) Parental leave 30% paid by employer
<b>Eligibility criteria</b>	13 weeks employment. In this period at least 120 hours	For paid leave the parent must have paid social contributions (National Insurance) for 26 weeks or more before the 15th week before the due date. Must give employer notice in advance	No criteria	Insured parents are eligible for employment protected leave  All parents are eligible for child care benefit if income is less than 14600 Euro/year	Insured parents are eligible for employment protected leave. At least 180 of insurance days. Uninsured parents are eligible for flat rate benefit	For paid leave, job contract must include social contributions (INPS)

Sources: OECD 2002; OECD 2003; OECD 2006a; Missoc 2006

#### *Duration*

We find also marked variation in the duration of parental among the EU Member States. Continental and Central

European countries have had a tradition for long parental leave periods. Among the WORKCARE countries Austria and Hungary have the longest parental leave



period while UK has only a short leave period. Compared to other countries Austrian policy on parental leave gives more support to parents (mothers), who choose full time care when their child is young. In Austrian policy there is a consensus about supporting mothers to care for children under the age of three.

The problem with long parental leave is that women's possibilities to enter labour market will be minimized. The parental leave system in Austria give employment protection up to the child's second birthday. After that parents can take up an additional year of unprotected childcare benefit. The problem in the Austrian system is that almost half of the women do not return to work at the end of the employment protected leave period. Fifty percent of those who do return to work change employer, often because of lack of part-time opportunities at the original workplace (OECD2003:19). The consequence is that about 40 percent of mothers who return to the labour market after the leave period are employed in so-called marginal jobs with limited earnings (OECD 2003:17).

#### *Flexibility in combining work and parental leave*

Having responsibility for small children in Denmark and Sweden does not mean that women are forced to give up employment. In Denmark the rate of employment even increases among mothers with one child compared to non-mothers but fall again for Danish mothers with two or more children. Among Swedish women the rates of employment are nearly constant whatever they have children or not. In Sweden parents can freely choose how to allocate the 480 days long leave period until the child is 8 years old. Parents can also decide how they want to divide the working day in time for caring and time for work and a large proportion of families spare periods of leave to take up later when the child starts kindergarten or pre-school.

Both Denmark and Sweden have significantly higher rates of employment for mothers and lower gender employment gaps between mothers and fathers than in all other European countries. In both countries becoming a mother has little impact on women's overall employment rate (Rubery, Smith and Fagan, 1999). However, for Sweden a significant proportion of the mothers maintain their labour market affiliation by reduced working hours while their children are young, while most Danish women take up full-time work after end parental leave and rely on external childcare. In most other European countries becoming a mother means that women in large number are forced to leave active labour market participation because of difficulties in reconciling work and caring for small children and as a consequence of the prevailing division of labour within families. In these countries women's rates of employment thus decline markedly when becoming mothers and the difference between women's and men's rates of employment – the gender gap – increases with a growing number of children in the family (Boje 2006).

Fathers, on the other hand, seem to be more strongly involved in the labour market than non-fathers in all European countries (Rubery, Smith and Fagan, 1999:106-7). In all the WORKCARE countries fathers have rates of employment of more than 90 per cent irrespective of the number of children and this is a significant increase compared to non-fathers.

### **6.2.2. Childcare provision**

#### *Policy objectives*

Caring obligations are differently defined in Europe; in some countries the welfare state provides services and/or social transfers to the family when provision of care is at issue. What was formerly defined as family obligations have been redefined as the responsibility of the state and local government – e.g. Scandinavia. In other

cases social rights are highly individualised either as an entire family obligation or provided for pay through private non-profit institutions or on pure market conditions – e.g. Italy and the United Kingdom. In this section we are looking at differences in caring regimes defined by the provision of child care facilities.

The intervention of the welfare state in areas traditionally considered as belonging to the private domain is particularly well demonstrated in social care policies. One of the distinctive features of the Nordic welfare states lies in the fact that care of children as well as ‘dependent’ adults has become a core element in welfare policies. To a larger extent than in other European welfare states the opportunity for receiving care has been transformed into social rights of citizens and the welfare state has expanded as a social service state.

A short look at the organisation of the family policy towards small children illustrates clearly the remarkable differences between caring regimes among the WORKCARE countries. The most common objectives for investing in childcare are to increase female employment and gender equity in the labour market. In the Scandinavian countries additional reasons for investing in childcare is both the promotion of gender equity and to ensure child development. The emphasis on child development is reflected in the Danish legislation on childcare. Childcare is thus seen as an important way to developing children’s independency and autonomy. In France the family policy has been generous for families with two or more children, emphasizing the pro-natalist policy objectives (Lewis 1992). Here women have the possibilities of choosing between full-time carer or full-time worker with access to policy childcare and generous supported by family allowances. In the United Kingdom family policy has mainly been focused on tackling child poverty and

reducing barriers to paid work for lone mothers. Before the New Labour government childcare facilities were only available for socially and physically handicapped children but these have now been extended to the general population in an attempt facilitate women’s possibilities of taking up gainful employment (Kremer 1999; Abrahamsen, Boje & Greve 2005). Since 1998 the access to childcare has thus improved dramatically in the UK.

### *Types of child care arrangements*

Among the EU Member States we find huge variation in how caring of children is organised. In studies of the ‘mixed economy of welfare’ the authors distinguishes between provision and financing of welfare from a number of arenas – public, commercial, voluntary and informal (Johnson 1999). When it comes to care-giving generally Anttonen and Sipilä (1996) suggest that care giving can be done in eight different ways. In this literature review we are not discussing care giving in general but only childcare services, which are normally grouped in four different broad categories.

- Centre based public care
- Family day care
- In-home care
- Informal care

Both centre based care and family day care can be financed through public and private sources and in-home care-giving can be provided by either the parents or employed carers paid by the parents or by public subsidises.

In Scandinavia the public sector runs the major part of child-care institutions and nearly all privately organised child-care are heavily subsidised by the public. The most common type of child-care in both Denmark and Sweden are centre based care followed by family day care. Scandinavian care giving is characterised by an ideal of professional care (Kremer 2006) and both Denmark and Sweden has probably the best-trained care workers in Europe (Siim 2000; Borchorst 2002). The

lower level of child-care coverage for children aged 0-3 in Sweden can be explained by a longer period with highly paid parental leave and for Swedish children aged 1-3 the rate of coverage is

about 80 per cent (Boje and Almqvist, 2000). In both countries institutional child care is provided full day making it possible for both parents to take up full-time jobs.

**Table 4.3. Childcare provision in the countries covered by the WORKCARE study**

	Denmark	UK	Sweden	Austria	Hungary	Italy
Child care objective	To promote gender equity and child development	To reduce poverty and reduce barriers to paid work. Education	To promote gender equity and child development	Education		
Different types of care	Centre based care Family day care	Centre based care Family day Care Childminders in home care (nannies)	Centre based care Family day care	Centre-based care Family day care Childminders Informal care	Centre based care	Informal care
Provider of service	State and municipalities	State and the market	Mixed public private service supervised and funded by the local authorities	Local authority (70%) and Non state providers (30)	State	State 55,2% 44,8 non state providers
Entitlement to provision for 0-3	87% municipalities guarantee places for all children 1-5	No legal entitlement for children under 3	Legal obligation to provide a place for children of working or studying parents	No legal right to service for children under 3	Legal right to childcare for working parents from the age of 6 month. In practice no legal right before the age of 3	No legal right to service for children under 3
Rate of access to regulated child care service (2004)	0-3 85 3-6 96%	0-3 26% 3-4 95% 5-6 100	1-2 45% 2-3 86% 3-5 91% 5-6 96%	0-3 8,9% 3-6 80%	0-3 9,3% 3-5 85% 5-6 97%	0-3 18,7% 3-4 70-90% 4-5 96%
Average cost to parents	22% of the service costs	45% of the service costs	9% of the service costs	Maximum 20 % of service cost	8,2% for child care and 3,5 pre school	Children 0-3 charged according to the income up to 18% of the costs
Public expenditure on ECEC policy % of GDP	2,1%	0,47%	1,9	0,55%	0,79%	0,44%
Unit cost pr child	USD 19 550 USD 10 200	USD 8452	USD 12097	USD 6169	USD 3 475	USD 5 445

Source OECD 2006a

In the liberal and market oriented welfare systems like the British welfare state, most of the care work is provided by individual households (Abrahamsen 2005:91). In the British welfare system the principle responsibility for care work relies on women and is unpaid – in spite of their growing involvement of British women in paid work. Previously public child-care institutions were available only for families with physically or socially handicapped children. This changed when the Labour government took over in the late 1990s. Since then a large number of child care institutions have been established but most of them are private and often highly expensive.

In Continental Europe care for small children is provided in-home either by mothers, grandmothers or nannies while care for children aged 3 and older is provided by a mix of public and private institutions, churches and NGO's. In Austria and Italy caring of children aged 0-3 is the concern of the family while children from the age of 3 are cared in primarily public kindergartens as it is the case in all four countries. Furthermore, in both countries the availability of institutional child-care is typically on a half-day basis, which makes it nearly impossible with full-time jobs for both parents.

#### *Public expenditure*

In all EU Member States there has been an increase in public expenditures on care giving. The demand for institutional care has increased followed by the growing number of women who have taken up gainful employment and especially in Member States with comparatively low public expenditure on childcare services we have seen increased spending. Public spending on services for children aged 0-6 are higher in the Scandinavian countries than elsewhere in Europe followed by France and the Central European countries (Hungary and Austria) while Southern Europe (Italy and Portugal) are placed in

the bottom (OECD 2005). Looking at the costs per child we find the same ranking with Denmark and Sweden on the top and Central and Southern Europe at the bottom.

#### *Childcare coverage*

Denmark has the highest coverage of public childcare for children under the age of three. The take-up rate for children between one and two years old are 83 per cent. In principle all children above six months are guaranteed a public funded day care place and childcare is seen as an integrated part of the social rights (Boje & Leira 2000). The high proportion of young Danish children in day care institutions can also be explained by the relative short period of paid parental leave, which was extended from 26 weeks to 52 weeks in 2004. In Sweden all children aged 0-1 are cared by the parents at home due to the long and generously paid parental leave. From the age of 2 years the take-up rate among Swedish children is the same as in Denmark and markedly higher than in any of the other EU Member States. In Austria and Hungary only 8,9% and 9,3% of the children are enrolled in childcare facilities. The long parental leave in Austria and Hungary helps to reduce the demand for childcare service.

In the UK 26 per cent of the children aged 0-3 are enrolled in public supported childcare institutions. The lack of childcare facilities have forced many British parents to seek a part-time solution in combination with private or mostly unpaid childcare arrangements relying on grandparents (Abrahamsen, Boje & Greve 2005:95). In Italy only 19 per cent of children aged 0-3 take up public supported childcare. Most Italian parents have therefore to rely on intergenerational care where grandmothers are the most frequent provider of the needed care and nearly half of the Italian children where the mothers have gainful employment are cared by the grandparents (Del Boca 2002:8).

## 7. CONCLUSION

Parents' working time as well as caring strategies and the policies supporting 'work-life' balance differ strongly between the EU Member States. In this conclusion we start by giving an overview of the difference between the countries at three

dimensions of high importance for understanding the 'work-life' balance related to caring of young children: work time flexibility, parental leave and provision of public supported childcare.

**Table 4.4. Welfare and Labour markets regimes in the countries covered by the WORKCARE project**

	Denmark	UK	Sweden	Austria	Hungary	Italy
Employee controlled work time flexibility	Low	Low	High	Medium	Low	Low
Parental leave	Medium/high	Low	High	High	Medium/High	Medium
Childcare services Aged 0-3	High	Medium	High	Low	Low	Medium

Looking at the level of employee-controlled flexibility it is highest in Sweden, medium in Austria and but low in the other four countries. In the countries with low employee-controlled flexibility this is low of different reasons. In Denmark and the UK the employers mainly control the working time schedule while in Italy it is regulated by strict collective agreements at the individual firms.

In Scandinavia the rates of employment for women are high and the great majority of women are working full-time. This is combined with a generous parental leave system for mothers – and potentially also for fathers – with small children and a high coverage of relatively cheap full-time institutional day care. In the other countries women are following two different strategies or a combination. A large majority of mothers with small children, who are in gainful employment, work part-time and often with short weekly hours in Continental and Southern Europe. On the other hand, many of these women are forced to leave the labour market temporarily because lack of or extremely expensive child caring facilities. In the UK

we find low public support for parental leave and a medium level of childcare provision for small children. Since 1998, the UK has, however, increased the number of public childcare places for children under the age of three significantly, which bring the UK closer to the general European pattern. The enrolment rate for children under three years is still much lower than in the Scandinavian countries and a large number of parents have to solve their caring demands at the private market or through part-time working. That can explain why many parents in the UK choose a part-time solution to balance work and care despite the labour market legislation is not encouraging part-time job.

Central European countries like Austria, Hungary and Germany have a long period of parental leave and medium public support for parental leave especially for those with an employment record, but weak provision of childcare for children under 3. These countries favour parents who care for their child aged 0-3 while in all countries provision of childcare for children aged 3 or more is high. For these children the caring becomes increasing

combined with educational aims and in most countries regularly educational activities start still earlier.

After this summary of differences in the family / labour market policy system

we now turn to differences between the countries in the policy outcome i.e. parental leave, provision of childcare and working time flexibility have influence on women's pattern of employment.

**Table 4.5. Policy outcome in the EU Member States covered by the WORKCARE project**

	Female employment, in 2005*	Part time employment as a proportion of total employment, women in 2005*	Part time employment as a proportion of total employment, men In 2005*	Employment for mothers with youngest child aged under 6, in 2002**	Share in part-time employment for mother with youngest child under 6 in 2002**	Fertility rate 2005 ***
<b>Denmark</b>	70,8	24,9	12,0	74	6	1,80
<b>UK</b>	66,8	39,3	10,0	57	58	1,80
<b>Sweden</b>	71,8****	20,8****	8,5****	78	41	1,77
<b>Austria</b>	62,0	29,6	4,8	75*****	40	1,41
<b>Hungary</b>	51,0	5,0	1,8	30	8	1,32
<b>Italy</b>	45,3	29,2	5,3	53	29	1,34

\* OECD 2006b; \*\* OECD 2005b; \*\*\* Eurostat; \*\*\*\* 2004; \*\*\*\*\* The employment rate includes women on child care benefit, the percentage of mothers with children under 3 years who actually is working is closer to 30% (OECD 2006a:86)

The Scandinavian caring system emphasizes parental employment after the parental leave but with different outcome. In Denmark the large majority of mothers take up full-time employment after end parental leave. They have no special rights to part-time jobs while their children are small and before 2004 the parental leave could only be taken on full-time basis. The condition for parental leave is markedly different in Sweden where a large number of parental take up part-time jobs and combine employment and parental leave for an extended period.

Women's employment rate – both for all women and for mothers with children aged 0-6 - is the highest in Denmark and Sweden are followed by UK and Austria, while Hungary and Italy have the lowest employment rate for women. Looking at the employment rate for mothers with children under 6 years, Hungary and Austria have the lowest employment rate. The low rate of employment for Austrian mothers can be explained by a combination of generous childcare benefit in the child's first 3 years and low provision of childcare. In

Scandinavian countries the rate of employment for mothers and for women in general are similar which reflect a generous childcare service and employment protected parental leave. In the UK the short period of paid leave and the moderate or little provision of public care force parents to choose between full time care or early return to the labour market (Boje & Leira 2000:66). Many British mothers choose part-time solutions to fit family responsibilities. The question is whether British mothers prefer part-time jobs or whether they are simply forced to take part-time jobs because of lack of child care facilities (Wallace 2003:13). The low level of childcare service and the restricted opportunities for part-timers in the UK could be seen as an indication that it is more likely that mothers are forced to take part-times job than they prefer part-time. Sweden also has a high proportion of part-timers among mothers, but in this case it is more likely that the mothers prefer to take up part-time jobs because they have better options to reconcile labour market participation with child care responsibilities. In Hungary and Denmark the share of part-timers among mothers is

low. The very limited right to choose part-time employment or low incentives for the employers to hire part-time workers can explain this. In Denmark mothers choose an early return to labour market because of the developed child care service in Denmark for children under three, while Hungarian mothers choose fulltime care when they receive child care benefit.

In all countries except the Scandinavian countries the enrolment rate for institutional childcare among children aged 0-6 is much lower than the employment rate for mothers with young children. This indicates that the demand for service for young children is much higher than the available childcare facilities.

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