



## Gender Equality Index 2019: focus on work-life balance

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Based on EIGE's Management Board decision (2017) regarding the future priorities of EIGE for the 2019-2021 mid-term strategy, as of 2019 the core Gender Equality Index will be updated annually with a deeper focus on one domain per year. This would enable more timely contributions to various policy initiatives. It was also decided that since the 2017 update, all forthcoming reports integrate an intersectional perspective.

The focus of the 2019 edition will be on work-life balance, which cuts across several domains of the Index. The analysis will be built around the central aspects of the European Pillar of Social Rights and the New start initiative on work-life balance, including legislative and non-legislative measures. Such analysis aims not only to build strong links of work-life balance with gender equality, but also to provide new insights and contribution to the monitoring of the implementation of the New Start initiative and other policy measures.

The main purpose of the forthcoming work is to present and analyse the Gender Equality Index 2019 in the context of work-life balance. The analysis will consist of three parts (see also table below):

- 1) Scores of the Gender Equality Index providing an overview of the current situation and trends of gender equality in the EU;
- 2) In-depth analysis of the domains of Index that describe work-life balance aspects (domains of work, time and knowledge);
- 3) Additional analysis of work-life balance context, focussing on aspects and indicators that are not included in the Index.

In addition to gender perspective, EIGE will consider applying the following approaches, where feasible and relevant: intersectional perspective, life-course approach, sectoral/occupational approach.

EIGE will not be taking a normative approach to defining a 'good' work-life balance or assessing which policy designs are superior to others in achieving work-life balance. The exact impact of each policy or measure for a certain person's work-life balance in a certain society does depend on the situation, needs and preferences of the individuals as well as on the provision of supporting services, labour market characteristics and social protection system as a whole. The aim is to present and explore different options people have for reconciling their work and life and if the availability of these options is equal to all women and men or if some groups are disadvantaged.

### Part 1: Developments in gender equality in the EU

This part of the analysis describes the development and situation of gender equality in EU and Member States (the Index scores in its six core domains). A short overview of all domains and sub-domains will be given to show in which areas and countries the progress has been largest and where most improvements are needed. It is important to emphasize that the methodology of the Gender Equality Index will not be changed, the work-life balance focus will be achieved through additional analysis in parts 2 and 3.

## PLANNING OF THE GENDER EQUALITY INDEX 2019

1. GENDER EQUALITY INDEX 2019: SCORES		
2. ANALYSIS OF THREE DOMAINS OF THE INDEX		
DOMAIN OF WORK SCORES and INDICATORS	DOMAIN OF TIME SCORES and INDICATORS	DOMAIN OF KNOWLEDGE SCORES and INDICATORS
<b>Indicators to be analysed</b> <ul style="list-style-type: none"> <li>FTE employment rate</li> <li>Duration of working life</li> <li>Ability to take an hour off during working hours for personal or family matters</li> <li>Career prospects</li> </ul>	<b>Indicators to be analysed</b> <ul style="list-style-type: none"> <li>People caring for and educating their children, grandchildren, elderly or people with disabilities</li> <li>People doing cooking and/or housework</li> <li>Sporting, cultural or leisure activities</li> <li>Voluntary or charitable activities</li> </ul>	<b>Indicators to be analysed</b> <ul style="list-style-type: none"> <li>People participating in formal or non-formal education and training</li> </ul>
3. CONTEXT ANALYSIS: ADDITIONAL INDICATORS		
3.1. Legislative measures	Possible indicators/topics to consider	
Leave policies Paternity leave <ul style="list-style-type: none"> <li>Maternity leave</li> <li>Parental leave</li> <li>Carer's leave</li> </ul>	<ul style="list-style-type: none"> <li>Duration of leaves for mothers/fathers (incl. % of total leave days allocated to men)</li> <li>Pay/benefit level (including ceilings)</li> <li>Care gap – time gap between paid leave arrangements and childcare provisions</li> <li>Other aspects, e.g. eligibility rules (self-employed, part-time workers, short-term contracts, income-related rules); flexible options</li> <li>Factual earned eligibility of different groups of parents to leave policies</li> </ul>	
Flexible working arrangements	<ul style="list-style-type: none"> <li>Legislative rights for flexible working arrangements</li> </ul>	
3.2. Non-legislative measures		
Protection against discrimination and dismissal	(Intersectional analysis of different aspects of work-life balance is partially connected to discrimination)	
Encouraging a gender-balanced use of family-related leaves and flexible working arrangements;	<ul style="list-style-type: none"> <li>Incentives for men to use leaves</li> <li>Spill-over effects between life and work by gender</li> <li>Availability of flexible working time arrangements by gender</li> <li>Unusual working hours, predictability, working time autonomy by gender</li> </ul>	
Making better use of European funds to improve long-term and childcare services;	<ul style="list-style-type: none"> <li>Use/availability of childcare services by age of children</li> <li>Use/availability of long-term care services</li> <li>Opening hours of childcare services, flexibility</li> <li>Care gap – entitlement to care services and relation to leave policies</li> </ul>	
Removing economic disincentives for second earners that prevent women from accessing the labour market or working full-time.	<ul style="list-style-type: none"> <li>Reasons for early exit from the labour market (care and family)</li> <li>Early retirement schemes, equalization of pension ages</li> <li>Average duration of working-life</li> <li>Employment rate at pre-retirement age</li> </ul>	
Other more aspects	<ul style="list-style-type: none"> <li>Main reason to quit working/retiring. Family or care related reasons</li> <li>Fertility and postponement of children</li> <li>Re-integration to labour market after long-term breaks</li> <li>Reasons for not participating in education and training by sex</li> <li>Not in education or training (NEET for family reasons)</li> </ul>	
In addition to gender perspective, the whole analysis will consider (where relevant and feasible): <b>Intersectional perspective</b> (age, dis/ability, family type, country of birth, education); <b>Life-course perspective</b> ; <b>Sectoral/profession perspective</b>		

## Part 2: Domains of work, time and knowledge from work-life perspective

While in 2017 edition of the Index all domains received equal attention, in 2019 edition the broader focus and in-depth analysis will cover the domains that are relevant from work-life balance perspective - domains of work, time and knowledge.

From the EU policy on work-life balance perspective, the starting point is the domain of work, since the work-life balance initiative aims at addressing women's under-representation in employment and support their career progression through improved conditions to reconcile their working and private duties. Two indicators in the domain of work measure the participation in employment, third is a work-life balance indicator and the fourth one – career prospects index – measures the career progression (see table below). The domain of time covers the time-use for caring and social activities and the domain of knowledge expands the scope of work-life balance from employment and caring to participation in education. The aspect of life-long learning also is tightly connected to career progression.

Gender gaps in these three Index domains will be analysed in more detail. Additional analysis of gender gaps in time-use for caring is possible by looking separately at different types of care - care of children, grandchildren, elderly or people with disabilities. We will also explore if it is possible to look at the exact number of minutes/hours that different groups of women and men spend on care, housework and other activities (such as volunteering). We will test if it is possible to analyse the 'sandwich generation' i.e. those who are taking care of both, children/grandchildren and elderly. The consultations with Eurofound and other data providers will be carried out.

## Part 3: Context analysis: additional topics and indicators

The purpose of integrating additional indicators into the analysis is to provide the work-life balance related context to the Gender Equality Index. The analysis will not only allow us to describe additional aspects, not included in the Index, but also analyse which aspects of work-life balance are linked to gender equality. This includes both individual level characteristics regarding family and work life as well as important societal context, such as availability of services and policies.

Below is a list of topics that will be explored further in the process, both from political importance point of view as well as from statistical feasibility point of view. Most likely, not all of these aspects will be covered in the final deliverable as some of these will be also covered by other studies (e.g. by the Commission or Eurofound). The first step will be listing and elaborating on indicators, analysing the quality of data (incl. sample sizes) before deciding which of the following can be covered in the analysis.

### Policy and legislative measures

The aspects of policy measures stem from the EC initiative of work-life balance, but are not limited to those. The focus will mostly be on different **leave provisions** that are listed in the initiative among legislative measures (paternity leave, parental leave and carer's leave). The purpose is to develop indicators to measure different aspects of leave policies (maternity, paternity, parental and carer's leave) i.e. the focus will be on policy provisions, not the actual implementation or take-up of these leaves (as this will be covered by the Commission).

- 1) **Duration and pay of leaves for women and men.** Possible aspects and indicators:

- duration of the care related leaves,
- comparison of the entitlements of fathers and mothers,
- the non-transferrable parts of the leaves (i.e. individual rights for the leave),
- pay level (e.g. % of previous income, ceilings and flat-rate benefits as % of average wage/minimum wage/sick-pay level).

2) **Eligibility rules.** The directive leaves several aspects of the leave provision for Member States to decide. This includes eligibility rules and if the leave may be subject to a period of work qualification and/or length of service. The analysis of the eligibility rules of the leaves will look at the conditions for receiving leave/benefits and which groups are possibly excluded. At least two approaches could be applied. One is analysis of rules and identifying which employment forms/conditions are not covered (self-employment, part-time work, short-term contracts, students etc.). Second approach would be to simulate, using microdata, the eligibility of (future) parents and analyse how many people in each particular country are eligible to the leave/benefit. Additionally, it may be then possible to identify which social-demographic groups are less often covered due to different employment conditions (e.g. migrant population, age groups).

As an example, one of the aspects that is significant is the equal treatment of men and women in self-employment. The work-life balance directive refers to the Directive 2010/41/EU on equal treatment between men and women that emphasizes that the self-employed should also be provided with maternity allowance (for at least 14 weeks). In the analysis we would look at the eligibility of self-employed to maternity leave, but also other types of leaves and allowances.

Following the Council directive 97/81/EC concerning the framework agreement on part-time work which prohibits discrimination against part-time workers, we would also look at the eligibility rules of leave policies to see if and how well the part-time workers are covered with the leave provisions.

3) **'Care gap'**- this is an interaction between childcare related leaves and provision of childcare services (i.e. early childcare education and care, ECEC). It is important to stress that the policies and provisions are designed together i.e. coordinated in the sense that an entitlement to leave leads immediately into, or coincides with, an entitlement to ECEC. In simple terms, the question is in assuring the continuity of care.

#### Non-legislative measures

**Spill-over effects between work and family life.** In addition to objectively measurable labour market outcomes, the work-life balance needs to be analysed using subjective information and assessment of people on the extent the work impacts their (family) life and vice versa. European Working Conditions Survey (EWCS) allows analysing different spill-over effects (such as working at free time; feeling tired to do housework; no sufficient time for children; family not allowing to concentrate at work, etc). Here the focus will be on intersectionality and possibly sectoral approach to supplement the analysis done by Eurofound on work-life balance.

Another significant spill-over effect and potentially an indication of poor options for work-life balance in general is the fact that people may postpone or cancel their family formation plans (e.g. postpone having children or decide not to have them at all).

**Employment.** Index includes an indicator on FTE employment rate. Additional analysis will also look at other indicators that describe labour market participation of men and women. Among indicators to be analysed will be employment and activity rate; part-time work; reasons for inactivity or part-time work (including family-related reasons). Additionally, re-integration to labour market after long-term breaks and economic incentives to work (tax systems) will be considered – most likely using desk research.

**Flexible working arrangements.** Directive 2010/18/EU article 7: time off from work on grounds of force majeure is very closely connected to the indicator of the Gender Equality Index which measures the share of employed people who can take an hour or two off for family-related reasons. Article 9 on flexible working arrangements mentions reduction in working hours, flexible work schedules and remote working possibilities. EWCS provides ample of information on different aspects of working arrangements that are relevant for work-life balance. This is one of the most researched aspect of work-life balance and it will also be covered by Eurofound. EIGE will explore new insights using intersectionality and sectoral approach. Aspects to be studied include: actual and desired working hours, flexible working time arrangements, satisfaction with working time, unusual working hours, predictability and working time autonomy.

**Infrastructure and public services.** Public services are important part of the work-life balance provisions. This concerns most evidently the availability as well as the affordability and quality of childcare services, but also care for people with disabilities and elderly. The analysis will look at Barcelona targets, but also other (administrative and survey) data will be looked to describe the provision of care. In the light of promoting flexible working arrangements and spread of new forms of work, the flexibility of care services is also important.

Feasibility of including other aspects of public services (e.g. availability of public transport) into the study will be explored. The commuting time is work-related activity and is an important aspect of work-life balance and gender equality. In addition, there is some evidence on that women's choices of workplaces and jobs are more limited as they tend to choose a workplace that is closer and requires shorter commuting time, when compared to men. There is also evidence from the UK that commuting causes women more stress than men, mostly due to their higher responsibility for household tasks, including childcare and housework<sup>1</sup>.

#### Other aspects

**Reconciling education/training, work and life.** Balance between education/training, work and life is an aspect that has not been much covered by studies or data. It is relevant for re-training of employees, improving the employability in a changing world of work, re-integrating people (especially parents) after long absences from work, but also for young parents to finish their studies. Difficulties in reconciling education/training with families may be an obstacle for family formation and a reason for postponement of births as well as entering the labour market or career development.

Aspects to be analysed include provision of leave for caring purposes to studying population, training opportunities by employers and attendance in lifelong learning (by family status, children), reasons

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<sup>1</sup> <https://www.sciencedirect.com/science/article/abs/pii/S0167629611000853>

for not participating in education/training (e.g. NEET – not in education, employment or training due to family responsibilities).

**Time-use.** In addition to indicators already used in the Index, there are different ways of getting more information about the time-use of men and women. For instance, a very important indicator is related to total working hours which count both paid and unpaid work (i.e. care work and/or volunteering).

In relation to the indicator on duration of working life of men and women, options and **reasons for early exit from the labour market** will be explored. This includes the unpaid work (care) that women and men do around actual retirement age, but also the availability and use of early retirement schemes, equalization of pension ages, etc.

### Possible approaches/perspectives to analysis

The general objective of the Directive 2006/54/EC on the implementation of the principle of equal opportunities and equal treatment of men and women in matters of employment and occupation is to ensure the implementation of the principle of equality between women and men with regard to labour market opportunities and treatment at work. EIGE's analysis will expand this approach by going beyond the dichotomist approach and by looking at differences within the groups of women and men. The actual extent of using these approaches will be decided after initial assessment of available data to see what is feasible and it may vary across indicators and topics.

**Intersectionality approach** will be continued in the same manner as it was presented in Index 2017 i.e. additional analysis can be carried out by looking not only at women and men, but also following characteristics of women and men.

- 1) Age and gender
- 2) Family status/children and age (incl. lone parents)
- 3) Country of birth and gender
- 4) (Dis)ability and gender
- 5) Education and gender

**Sectoral/occupational approach** allows comparing women and men working in different sectors and/or occupations. This approach is especially important for the analysis of the domain of work and partially the domain of knowledge. It can be applied only to working population. It acknowledges the fact that labour market experiences are very strongly related to the sector and/or occupation where women and men are working. Depending on the data source, the analysis may be limited to the EU-28 and not allow Member State level analysis.

Working conditions and work-life balance situation in different sectors or occupations has not been explored much, therefore, can provide a big added value. This approach has already been applied by EIGE in its most recent research note 'Women and men in ICT: a chance for better work-life balance'.

**Life-course perspective** allows looking at work-life balance of people in different stages of their lives. Eurofound has applied this approach to EWCS survey where working people are divided between nine stages, starting from single young people, couples without children, couples with different ages of children and ending with empty nest phases. This approach combines family status with age and allows better understanding of work-life balance issues and how they are related to the life-course.

EIGE needs to take into account that Eurofound will also work on work-life balance issues during 2018<sup>2</sup>, using EWCS and EQLS data that are also important data sources for EIGE's analysis. In order to avoid duplications and provide added value for policy-making, EIGE runs consultations with its stakeholders to be able to define the focus of analysis for the Gender Equality Index 2019.

## Activities

- Experts' consultation meeting on work-life balance and leave policies was held on 10th of April, 2018. The meeting focussed mostly on leave provisions, but also infrastructure and care for elderly and people with disabilities.
- Calculation of the Index 2019 (early spring 2019) done by EIGE's Index team.
- Analysis of the Index 2019 (spring-summer 2019) done by EIGE's Index team.
- Analysis of the work-life balance additional indicators. Most of the work related to the collection of additional indicators will be done by EIGE's Index team. There are some specific aspects of analysis, which will be contracted out to external experts and completed during the second half of 2018 and early 2019:
  - Developing indicators for describing and possibly monitoring the provisions of leave policies in EU-28.
  - Analysis of the eligibility to leave provisions in EU Member States.
  - Research paper on carer's leave and other support/services provided to care for elderly and/or people with disabilities, including a proposal of indicators.
  - Research paper on the role of infrastructure (e.g. availability and affordability of public transport, town planning) in work-life balance, including analysis of existing statistics and proposal of indicators.
  - Research paper on reconciliation of education/training, work and life, including analysis of existing statistics and proposal of indicators.

**Output:** Main report of the Gender Equality Index 2019 (around 80 pages) with a thematic focus on work-life balance; main findings (10-15 pages) targeting policy makers and thematic factsheets. Data, analysis and other information will be presented in print and published in EIGE's Index web interface.

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<sup>2</sup> Eurofound will produce a report of 80 pages with a focus on flexible work arrangements of men and women; care responsibilities and services and work-life balance. In addition to gender disaggregation, they also plan introducing certain level of intersectionality in the analysis (looking at men and women by household type, care responsibilities, life-course perspective) and look at both, working and non-working population.