WORK-FAMILY PRACTICES
IN PORTUGUESE ENTERPRISES:
EMPLOYEE AND ORGANIZATIONAL PERCEPTIONS

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LIST OF CONTENTS

List of Contents .................................................................................................................. 2
List of Figures ..................................................................................................................... 8
List of Tables ...................................................................................................................... 10
Abstract ............................................................................................................................ 12
Declaration ......................................................................................................................... 13
Copyright and Ownership of Intellectual Property Rights .............................................. 13
Acknowledgements ......................................................................................................... 14

CHAPTER 1. Introduction ............................................................................................... 16
  1.1. Aims and Research questions ............................................................................ 16
  1.2. Relevance of the research ............................................................................. 17
  1.3. Literatures addressed ...................................................................................... 21
  1.4. Research methodology ................................................................................... 23
  1.5. Structure of the thesis ..................................................................................... 25

CHAPTER 2. Portugal - Economic and Management Environment ......................... 26
  2.1. Introduction ....................................................................................................... 26
  2.2. Background ....................................................................................................... 28
    2.2.1. Geography ................................................................................................ 28
    2.2.2. Population ................................................................................................ 28
    2.2.3. Political Structure .................................................................................... 30
    2.2.4. Economic Structure ................................................................................ 31
2.3. Recent economic history ......................................................................................................... 32

2.3.1. 1950 – 1973 - The Estado Novo ....................................................................................... 32

2.3.2. 1974 onwards – Modern economy ............................................................................... 36

2.4. Evolution of Management ...................................................................................................... 40

2.4.1. Early Management Practices ......................................................................................... 40

2.4.2. 1950 – 1973 - The Estado Novo ....................................................................................... 41

2.4.3. 1974 onwards – Modern Management ........................................................................ 44

2.5. Conclusion ............................................................................................................................... 44

CHAPTER 3. Work-Personal / Family life policies at work .................................................. 46

3.1. Introduction ........................................................................................................................... 46

3.2. Defining Work - Personal / Family life arena ........................................................................ 47

3.3. Evolution of Work and Personal/Family life as a field of research ...................................... 50

3.3.1. Roots and Early work (1920s) ....................................................................................... 50

3.3.2. Relating work to other aspects of life (1960s / 1970s) .................................................... 52

3.3.3. Work-family conflict (1980s) ......................................................................................... 55

3.3.4. Harmonizing work and family life (1990s) ...................................................................... 57

3.3.5. Permeability of the work-family boundary (2000s) ....................................................... 59

3.3.6. Rosabeth Moss Kanter – a recurrent landmark ............................................................. 60

3.4. Work-family interface ............................................................................................................ 63

3.4.1. Introduction ..................................................................................................................... 63

3.4.2. Work-family conflict ....................................................................................................... 64

3.4.3. Work-family enrichment: beyond work-family conflict ............................................. 69

3.4.4. Conclusion ...................................................................................................................... 70
3.5. Corporate culture and organizational climate ................................................... 70

3.5.1. Introduction .................................................................................................... 70

3.5.2. Culture and climate as organizational concepts ............................................. 72

3.5.3. Definitions of organizational climate ............................................................ 74

3.5.4. Definitions of organizational culture ............................................................. 75

3.5.5. Conclusion ..................................................................................................... 77

3.6. Family-Supportive Work Environment ............................................................. 78

3.6.1. Introduction .................................................................................................... 78

3.6.2. Family-supportive organizational culture ..................................................... 80

3.6.3. Family-supportive organizational perceptions ............................................... 82

3.6.4. Family-supportive environment and general organizational context ............. 84

3.7. Conclusion ........................................................................................................ 85

CHAPTER 4. Corporate Social Responsibility ....................................................... 87

4.1. Introduction ....................................................................................................... 87

4.2. Defining Corporate Social Responsibility ......................................................... 88

4.3. Evolution of Corporate Social Responsibility as a field of research ................. 92

4.3.1. The factory system and the pioneers (up to 1950) ........................................... 92

4.3.2. Shaping the idea (1950s / 1960s) ................................................................. 93

4.3.3. Critiques, Theories and Complementary themes (from 1970 onwards) ......... 95

4.3.4. The new century (2000s) ............................................................................ 100

4.4. A framework for Corporate Social Responsibility ........................................... 103

4.5. Corporate Social Responsibility and Work-Personal/Family life ..................... 113

4.6. Critical perspectives ........................................................................................ 115
6.2.1. Institutions .................................................................................................................. 152
6.2.2. Staff .............................................................................................................................. 154
6.3. Institutions Characterization ............................................................................................ 157
6.3.1. Banking and Financial Services Sector ................................................................. 157
6.3.2. Retail and Wholesale Sector ..................................................................................... 165
6.3.3. Transport Sector ......................................................................................................... 173
6.3.4. Utilities Sector ............................................................................................................ 180
6.4. Institutional Patterns ........................................................................................................ 188
6.5. Conclusion ....................................................................................................................... 190

CHAPTER 7. Analysis .............................................................................................................. 191
7.1. Introduction ...................................................................................................................... 191
7.2. Work-Family Policies patterns ...................................................................................... 192
7.3. Work-Family Culture patterns ...................................................................................... 198
7.4. Family-Supportive Culture ............................................................................................ 200
7.5. Institutional drivers ........................................................................................................ 203
7.5.1. Relationships analysis ............................................................................................. 203
7.5.2. Factor analysis ........................................................................................................... 207
7.6. Individual drivers ........................................................................................................... 211
7.6.1. Relationships analysis ............................................................................................. 211
7.6.2. Factor analysis ........................................................................................................... 213
7.7. Differing perceptions ...................................................................................................... 214
7.8. Corporate Social Responsibility Cross-Analysis ............................................................. 222
7.9. Economic Recession scenario ......................................................................................... 228
CHAPTER 8. Conclusions

8.1. Introduction
8.2. Main Results
8.3. Theoretical implications
8.4. Relevance for practice
8.5. Limitations
8.6. Further directions

Bibliography

Appendix A. Survey
Appendix B. Interview guide
Appendix C. Survey – Organizational results
Appendix D. Survey – Staff results
Appendix E. List of Interviews
Appendix F. Organisation - Analysis of Covariance
Appendix G. Staff - Analysis of Covariance
Appendix H. Organisation – Factor analysis
Appendix I. Staff – Factor analysis

NUMBER OF WORDS: 74394
LIST OF FIGURES

Figure 1 – Portugal – Global Picture, 1800-2000 ............................................................. 28

Figure 2 – Portugal - Evolution and growth rates of the population, 1864-1991 ........... 29

Figure 3 – Portugal - Employment and GDP structure per economic sector in 1950 and
1973................................................................................................................................... 34

Figure 4 – Integration of work and family arenas with personal life......................... 54

Figure 5 – Integration of work – personal / family life............................................. 114

Figure 6 – Social Responsibility – Linking Business and Society............................. 115

Figure 7 – Conceptual framework............................................................................. 131

Figure 8 – Base survey............................................................................................... 137

Figure 9 – Work-family culture questions and dimensions ..................................... 138

Figure 10 – Firm’s survey.......................................................................................... 140

Figure 11 – Staff’s survey.......................................................................................... 140

Figure 12 – Work-Family Policies (Job Flexibility) – organizational perspective....... 192

Figure 13 – Work-Family Policies (Support, Services and Benefits) – organizational
perspective..................................................................................................................... 194

Figure 14 – Work-Family Policies (Job Flexibility) – staff perspective.................... 196

Figure 15 – Work-Family Policies (Support, Services and Benefits) – staff perspective197

Figure 16 – Work-Family Culture - hindrances and promoters – organizational
perspective..................................................................................................................... 198

Figure 17 – Work-Family Culture - managerial attitudes – organizational perspective. 199

Figure 18 – Work-Family Culture - hindrances and promoters – staff perspective....... 199

Figure 19 – Work-Family Culture - managerial attitudes – staff perspective .......... 200
LIST OF TABLES

Table 1 - Employment rate, part-time and temporary contracts, 2010 ......................... 30
Table 2 – Planos de Fomento .......................................................................................... 33
Table 3 – Demographic indicators 1930-1970 ............................................................... 35
Table 4 – Work characteristics antecedents of an higher WFC .................................... 66
Table 5 – Work characteristics antecedents of a lower WFC ....................................... 66
Table 6 – Classification of CSR approaches ................................................................. 113
Table 7 – Participating Firms ..................................................................................... 135
Table 8 – Survey - Number of valid answers per firm ................................................. 142
Table 9 – Interviews - Number of interviews per firm ................................................. 147
Table 10 – Overview of participating institutions ....................................................... 152
Table 11 – Overview of participating staff (on survey) (1) ......................................... 155
Table 12 – Overview of participating staff (on survey) (2) ......................................... 155
Table 13 – Overview of participating staff (on survey) (3) ......................................... 156
Table 14 – Overview of participating staff (on survey) (4) ......................................... 156
Table 15 – Organizational data - Correlation Matrix .................................................... 203
Table 16 – Organizational data - Correlation Matrix (using mwfp and mwfc) .......... 206
Table 17 – Staff data - Correlation Matrix .................................................................. 211
Table 18 – Survey - Work-Family life Policies scale ..................................................... 275
Table 19 – Survey – Work-Family life culture scale .................................................... 276
Table 20 – Work-Family Policies per Organization– Organizational Perspective ....... 283
Table 21 – Work-Family Supportive Culture per Organization – Organizational Perspective .......................................................................................................................... 284

Table 22 – Overall Work-Family Organizational Indicators per Organization – Organizational Perspective .................................................................................................................. 284

Table 23 – Work-Family Policies per Organization – Staff perspective .................................. 285

Table 24 – Work-Family Supportive Culture per Organization – Staff perspective ...... 286

Table 25 – Overall Work-Family Organizational Indicators per Organization – Staff perspective ........................................................................................................................................ 286

Table 26 – Dimensions of Family-Supportive Culture per Organization – Staff perspective .................................................................................................................................... 286
Abstract

The aim of this research is to present empirical evidence on the effects of framing the business commitment to work-family life issues as a corporate social responsibility.

Some authors (Pitt-Catsouphes and Googins, 2004, Goodstein, 1994b) have already claimed the need for recasting the work-family agenda as a corporate social responsibility, by considering employees and their families as a social concern fundamental for sustainability. However further research is missing. The core of this research is the confrontation and cross-analysis of both arenas and literatures.

The research consisted of a national cross-sectional study based on a set of twelve medium-large Portuguese firms, aggregated in four clusters grouped by economic activity: Banking and Financial Services, Wholesale and Retail, Transport and Utilities Services. Different research methods were used: a survey and in-depth semi-structured interviews. The survey was answered by the human resources managers and 2472 employees. Sixty interviews were performed. The triangulation of different perspectives and research methods enhanced the study with insightful conclusions.

The analysis situated the firms according to their work-family life policies, culture and corporate social responsibility approaches, in a general map describing the panorama regarding the way firms consider their role in society (Garriga and Mele, 2004). In line with the literature, the study also assessed that a gap existing between the institutional perspective and the employees’ perception of the value and accessibility of work-family initiatives and an organization’s overall family-supportiveness (e.g. Parker and Allen, 2001, Allen, 2001, O'Driscoll et al., 2003).

The research revealed that there is a relationship between the organization and employees’ perceptions gap and the alignment (or misalignment) between the approaches to both fields: work-family practices and corporate social responsibility. Whereas inconsistency between both approaches was detrimental for the perception of the employees, regarding organizational supportiveness alignment between them proved to reinforce perceptions regarding initiatives in both fields.

By establishing the bridge between these two normally separately studied themes, the research opens doors to new directions of work. It also confirms the importance of a holistic view of the organization and its role towards its people and society.
Declaration

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I dedicate this thesis to my parents. They know why.
“the destination has not been reached just because the map has been drawn”

(Kanter, 1997)
CHAPTER 1. INTRODUCTION

1.1. AIMS AND RESEARCH QUESTIONS

The aim of this research is to present empirical evidence of the effects of framing the business commitment to work-family life practices as a corporate social responsibility.

There have been concerted efforts made by corporations to increase workplace responsiveness to employees’ work-family life priorities. Traditionally, many companies have framed such internal social policies, such as work-family life initiatives, as a Human Resources management issue concerning the personal development of their employees or a welfare issue. Basically, the argument is that employers could accrue benefits and reduce costs if they establish work-family life initiatives that fit organizational needs and also address the needs of employees (Pitt-Catsouphes and Googins, 2004).

The above approach focuses on a single stakeholder group (the employees) and the inner mission of the firm. While the interface thought as employer-employee-family (or organization-person-family) has an inner focus from the organizational point-of-view, when it is framed as business-person-society, these relationships are, somehow, exteriorized. For instance when firms implement some work-family life practices taking into consideration their employees and, through them, their families, it can be said that such firms are mainly focused on their internal responsibility or mission; while when they take some initiatives considering their social responsibility towards the local community and the families, which happen to include their employees’ families, they are mainly addressing their external social responsibility.

Goodstein (1994b) found that norms and expectations exert pressure on organisations and can affect firm responsiveness to work-family life issues. Namely, he advances that a social responsibility case for work-family life issues is likely to influence large corporations because society expects them to be cognizant and to respond to important social concerns, such as the quality of life of working families.

The background hypothesis of this research is that recasting the work-family agenda as a corporate social responsibility, by thinking at employees’ families as both another indirect stakeholder and a social concern fundamental for sustainability, will foster its integration also at the external mission of the firm. Some authors have already claimed such
proposition (Pitt-Catsourhes and Googins, 2004, Goodstein, 1994b) but further research is missing, namely, confronting both fields of research: work-family life and corporate social responsibility.

Furthermore, the effectiveness of work-family life initiatives greatly depends on the employees’ perception of their value, which is not always the same as the one envisaged and targeted by the organization. Therefore, ultimately, the aim of this dissertation is to examine the different institutional stances when addressing work-family life initiatives and how these are related to the employees’ perception of the value of such initiatives.

Summarizing, the questions to be addressed by this research are:

- Is the convergence/divergence of perception of the corporation and employees on each organization related to the way company’s work-family policies and initiatives are framed?
- If so, should Corporate Social Responsibility strategy be aligned and integrated with Work-Family Life Strategy and Policies, in order to promote a consistent corporate mission towards society? What if they aren’t?

1.2. RELEVANCE OF THE RESEARCH

A recent study, Babies and Bosses - Reconciling Work and Family Life, conducted by the Organisation for Economic Co-operation and Development (OECD) (OECD, 2005), covering Australia, Denmark, the Netherlands, Austria, Japan, Ireland, New Zealand, Portugal, Switzerland, Canada, Finland, Sweden and the United Kingdom, emphasizes that strong economies and manageable pensions systems depend on both higher fertility rates and higher employment rates. It concludes that governments are promoting work-family life policies for numerous reasons: to reduce poverty and promote child development and family well-being, to underpin economic growth and to bolster pension systems.

The above mentioned study shows that in Portugal, a country with a relatively wide income distribution and a large low-wage sector, there is a high incidence of working poverty, especially among single-earner couples. Traditionally Portuguese women have always worked and, by 2003, almost two out of three Portuguese women were in paid work and the vast majority (85%) had a full-time job (OECD, 2004). Portuguese work-
family life policy emphasizes gender equity and some initiatives are relatively successful: the 15-day paid father quota, introduced in 2000, was used by 30% to 40% of eligible fathers during 2003 (OECD, 2004). However, many women and men regard their working hours as a major barrier to spending more time with their children or to having larger families – Portugal’s fertility rate is low, at 1.5 children per woman. Though Portuguese government provides entitlements which allow parents to work fewer hours and spend more time with their children, most people cannot afford the equivalent loss of earnings.

A more recent study states that families have changed over the past thirty years (OECD, 2011a). Changes can be recognized in family formation, household structure, work-life balance and child well-being. Fertility rates have been persistently low in many OECD countries leading to smaller families while increasing the number of children growing up in sole-parent families. And sole-parent families are of particular concern due to the high incidence of poverty among such households. The study concludes that overall, some families are undoubtedly doing better, but many others face serious constraints when trying to reconcile work and family aspirations.

Furthermore, not only parents but also a growing number of carers for people older than 65 years of age are also reclaiming more social policies that will facilitate the day-to-day support they have to provide. Though the way each society addresses the problem of caring for the elder depends on social, moral and ethical norms, government policy and other country-specific circumstances (Ngai and Pissarides, 2009), in Portugal, like in most countries (OECD, 2011b) family carers supply the bulk of the caring and the continuation of caring roles will be essential given future demographic, cost pressures and the preferences of the care recipients.

In line with this three main assumptions, OECD suggests governments should reduce unnecessary barriers to part-time employment by, for instance, changing the childcare fee structure (and subsidies): parental fees should reflect the number of hours for which childcare services are used (OECD, 2004).

However, governments and demographic and societal concerns as those stated are only one, though an important one, of the arenas that influence a person’s life and, consequently, the work-personal/family life interface. Other arenas are the family itself and the workplace. The effectiveness of social public policies in helping carers combine
care with paid work and in reducing burnout and stress of carers is essential. Yet workplaces can do more in order to provide flexible working schedules, including part-time employment, helping carers to stay in the workforce and balancing the requirements of the job with family care responsibilities, including the care of children, ill and disabled working-age adults, and the frail elderly (OECD, 2011b).

While the societal issues of increasing economic growth, reducing poverty, enhancing societal well-being and helping to ensure a sustainable development are of paramount importance, even in a hypothetical scenario of non declining population, juggling work and family commitments would continue to be a major challenge.

Work and family realities are not independent scopes of human life in general (Kanter, 1977). They mutually influence each other (e.g. Pleck, 1977), in both positive and negative ways (e.g. Greenhaus, 1988). And, since they are both important and fulfilling, the search for harmonizing both has been widely researched. Several studies have shown that work-family conflict is a consequence of work stressors and work conflict (e.g. Burke, 1988, Greenglass et al., 1988) and a cause of strain (e.g. Frone et al., 1994). Other negative effects of work-family conflict have also been extensively documented, including consequences for the individual, such as, for instance: greater health risks, anxiety, emotional exhaustion, lower performance and involvement in job and family activities, less marital satisfaction, job satisfaction and overall life satisfaction (e.g. Small and Riley, 1990, Greenhaus and Beutell, 1985, Voydanoff, 1987, Pleck, 1985, Boles et al., 1997a) and for the family, for example: irritation and absentmindedness in family activities, less time spent together by the couple, lower marital satisfaction, weaker overall school performance of children, higher parent-adolescent conflict (e.g. Kingston and Nock, 1987, Goldberg et al., 1996b, Atkinson et al., 1986, Greenglass et al., 1988, Crouter et al., 1999).

All these studies provide a clear and strong argument for preventing work-family conflict in the workplace or even, furthermore, facilitating the harmonization of both work and family. In fact, consequences are not limited to individuals and their families but they do affect also the companies, (e.g. Duxbury and Higgins, 1991, Kossek and Ozeki, 1998). In recent firm-level studies, researchers found that work-family initiatives have been associated with increased perceived market share, profit-sales growth, organizational
performance (Perry-Smith and Blum, 2000), firm productivity (Glass and Finley, 2002), shareholder returns and share price (Arthur and Cook, 2004).

Other potential benefits that may result from the implementation of work-family life workplace initiatives include, for example, reduced staff turnover, increased return rate following parental leave (Hewlett and Luce, 2005), reduced absenteeism (Pitt-Catsouphes and Bankert, 1998), increased productivity (Solomon, 1994), improved employee morale (Pitt-Catsouphes and Bankert, 1998), improved attraction and retention of staff (Pitt-Catsouphes and Bankert, 1998, Chinchilla and Torres, 2006) and, overall, more favorable job attitudes (Allen, 2001, Glass and Finley, 2002, Grover and Crooker, 1995).

Many firms have come to view such policies as a way to create a supportive culture and promote workplace equality (Bond and Wise, 2003b). According to Wood et al. (2003), the adoption of work-family life policies is determined by managerial values, knowledge, and perceptions regarding work–family programmes. A firm is more likely to implement such policies if its senior executives believe that such practices can achieve certain organizational goals such as retention of talent.

However, findings on work-family life initiatives are mixed. Meyer et al. (2001) noted that not all work–family programmes have the same impact on profits. Konrad and Mangel (2000) reported that work–family programmes were associated with firm productivity only when organizations employed high percentages of women and professional employees. Based on an extensive review of empirical literature, Gottlieb et al. (1998) concluded that flexible work arrangements have negligible effects on organizational productivity. The above mixed findings highlight the need to develop and test theoretical models of work–family initiatives at the organizational level (Bardoel et al., 1999). Hence, Perry-Smith and Blum (2000) argued that various types of social policies are complementary and interrelated, and thus they should be considered as bundles. According to them, work–family bundles not only provide strategic advantage for firms, but also serve as positive symbols that signal to employees that their organizations care about them and value their contributions, reflecting the organization’s attempt to build a climate of caring and commitment to employees (Grover and Crooker, 1995).

It is worth highlighting that family is also a social reality, based on relationships that support and promote personal development and community life. Family plays an
important role at social sustainability. Therefore, firms as corporate citizens should consider their direct social responsibility in what concerns their employees’ families (Pitt-Catsouphes and Googins, 2004). Indeed, some business leaders have already framed work-family issues that way. For instance, the Conference Board reported the results of three corporate surveys conducted during years 1999 to 2001 according to which the majority of the 700 respondent firms declared that work-life balance was among the top priorities for the companies as corporate citizens (Muirhead et al., 2002).

However, other studies demonstrate that the way organizations foresee that work-family life policies and initiatives will be accessible and beneficial to their employees (Budd and Mumford, 2005) is much more enthusiastic than the employees’ perception about it. When realizing the existence of this misalignment and its negative consequences for the company, some factors, such as internal communication and, consequently, the knowledge about policies (Ingram and Simons, 1995, Goodstein, 1994b) have been found as having a clear influence on the assessment of work-family life policies by employees. However these factors do not fully explain the gap of perceptions and other factors seem to be equally influential. Comparing, for instance, with ecological responsiveness (Bansal and Roth, 2000), it is possible that the way these policies are placed (the firms’ motivations for embracing such initiatives) is related to the perception that the employees have of these initiatives being beneficial to them. The study of such possible factors is the aim of the research.

1.3. LITERATURES ADDRESSED

Dilemmas relating to the management of paid work alongside other parts of life, especially family, have been at the focus of Human Resource Management research for several decades, (Rapoport and Rapoport, 1966, Kanter, 1977, Thompson et al., 1999, Brough and Kalliath, 2009), particularly since the consideration that attitudes and behaviour spill over between both work and personal and family worlds (Greenhaus and Beutell, 1985). Moreover, as Kanter states, both worlds and the interrelationship between them is essential, constituent, intrinsic to personal life. According to this author, this should be the standing point for more integrative research directions starting either from work or family (Kanter, 1977).
Research on this topic has always reflected social, economic and workplace developments and concerns, shifting in response to new trends on human resources management. For example, as the number of women entering the labour force grew, from the 1960s onwards, research in certain contexts tended to focus on ‘working mothers’ or dual earner families, while concerns about stress and burnout associated with workplace changes in the 1980s and 1990s were reflected in the research and debate about work–family conflict (Lewis et al., 2007).

The first part of the literature review will review the genesis of modern management thought related to work-personal/family life research. Though it traces its roots back to the existence of mankind, the interface between work and other personal and familiar scopes of our lives is generally considered to have begun as an academic discipline by the 1950s. Nevertheless, since the industrial revolution and the dawn of scientific management era, abundant organizational studies have been carried out paving the way to work-personal/family life studies. Hence, this will be the starting point for the literature review.

For many scholars, one of the most influential, pioneer and seminal author in the field of work-family life integration was Rosabeth Moss Kanter. Thus, special attention will be paid to her thoughts and oeuvre.

The second part of the Literature Review will address definition, theory and models, (Carroll, 1979, Melé, 2008) of social responsibility of the corporations. A significant part of the emerging relevant literature is dedicated to ideas about the perception of a firm as being socially responsible and the strategic implications of it (McWilliams et al., 2006). The literature about these issues will be the object of this part of the review. Finally, special attention is given to the framework drawn by Garriga and Mele (2004) as this model will serve as lens for the analysis of the different stances adopted by the participating institutions in what regards Corporate Social Responsibility.

Even though numerous theories have been developed since then, the roots of the debate about the social responsibility of business date back to the middle of 20th century with the decisive contribution of Theodore Levitt (Levitt, 1958) in his article ‘The Dangers of Social Responsibility’. Hence, the evolution of management thought can be traced in the first and second part of the Literature Review. And in fact, the actual intention of both parts of the Literature Review is to shed light on the interactions between the two arenas.
and to derive antecedent conditions that, at the end, may influence the different employees’ perceptions to corporate social initiatives.

1.4. RESEARCH METHODOLOGY

The research strategy basically followed an inductive approach due to the lack of literature relating work-family studies and the social responsibility of firms. According to Cassel and Symons (2004), in the search for the missing link, a more interpretative and less quantitative stance is more adequate as conclusions were achieved by induction and inference from a basis of empirical observation. Yet, by defining and using an appropriate methodological framework, the implementation of the research design was guided throughout the fieldwork in close relation to the phenomena to be explained (Thomas, 2004).

The research, though predominantly qualitative, combined quantitative (functionalist-positivist) and qualitative (critical-interpretative) methods in a multi-paradigm approach that included the following methods:

- An initial survey, aiming to outline work-family life policies and initiatives as well as to characterize the work-family culture, focusing on the three dimensions described in the relevant work-family life literature, from the organization and employees viewpoint.

- A set of semi-structured in-depth interviews with HR/CSR managers, line managers and employees from the participating firms, aiming to understand their perception on the value of work-life policies, on the organizational environment as being family-supportive and the frame and organizational drivers in what concerns work-life and CSR initiatives.

The use of a quantitative approach, mostly surveys, has been applied, recurrently, when studying work-personal/family life interface in general or any of its specific characteristics or relationships between them (e.g. Sanik, 1993, Greenglass et al., 1988, Burke, 1988, Higgins et al., 1992, Thomas and Ganster, 1995, Carlson and Perrew, 1999).

Quantitative approach is not only well suited for testing theories (Bryman and Bell, 2007), but it is also a simple, accessible and well-timed way of capturing and measuring reliable and valid data from a population, fairly large and dispersed such is the work-force
of the various participating firms in order to compare indicators between firms (May, 2006). These indicators, in the case of this research, were, for example, the gap between the differing perceptions of the existence and accessibility of work-family life policies and of a family-supportive environment, from the organization and the employees.

On the other hand, the option for qualitative methods seems to be quite appropriate for research focusing on organizational processes and to understand and interpret both individual and group experiences of work (e.g. Creswell, 1994, Bryman and Bell, 2007), because of its characteristics comparatively to quantitative methods. First, they are more open to emergent issues and concerned with the participants´ view of the phenomena, while accepting the inherent subjectivity of the research; second, they are more sensitive to the organizational life under research, being able to capture and encompass that dynamism and third, they seek to provide a holistic view of the organization (Cassell and Symon, 1994).

The triangulation of different findings and multiple perspectives from different stakeholders enabled to fully understand the nature of the link as well as for cross-checking the consistency (or inconsistency) of the findings. In fact, triangulation of data by multi-method approaches is a good practice in organizational research (Creswell, 2003), where the kernel of it is about very complex processes involving different actors (Cassell and Symon, 1994).

The combination of different perspectives - the institutional perspective, provided by the Human Resources managers and the employees’ perspectives – and of different research methods - collected through the survey and from the in-depth semi-structured interviews, commonly referred to as a triangulation of perspectives, enhanced the vision of insightful concepts that characterized the social reality under study.

Data collection comprised a national cross-sectional study based on a set of twelve medium-large Portuguese firms, aggregated in four clusters grouped by economic activity: Banking and Financial Services, Wholesale and Retail, Transport and Utilities Services. The survey was answered by the Human Resources managers, who were also interviewed and by 2472 employees. Sixty interviews to the employees (5 per firm) were also performed.
Important reasons for being a national cross-sectional study were its originality and the accessibility of data sources. Another fundamental reason for a national study is that work-family life policies and social responsibility strategies are issues with a significant cultural component (Kossek and Lambert, 2005).

1.5. STRUCTURE OF THE THESIS

This thesis is structured as follows.

Chapter 2 introduces the Portuguese economic and management environment aiming to understand and explore the singularities of Portuguese firms.

Chapter 3 and Chapter 4 present the literature review which was undertaken to define the concepts and frames with regard to the identified core themes of the research: Work-Family life issues and Corporate Social Responsibility. Both chapters begin with a discussion on problems of interpretation, followed by a description of the evolutionary process that has been the emergence of both concepts in business. Furthermore, specific topics of each theme covered in the relevant literature will also be analyzed (e.g. antecedents and consequents of work-family conflict, constituents of family-supportive culture and drivers of Corporate Social Responsibility). Chapter 4 ends with the conceptual merger of both arenas and the presentation of the theoretical framework of analysis, which will be used to confront the findings.

Chapter 5 explains the research methodological framework and details and discusses the methodology of the undertaken research. The results of the fieldwork are shown in Chapter 6 and discussed in Chapter 7, namely the patterns of the work-family life policies and culture, the convergence/divergence of the perception of the value of such issues between the corporation and employees on each organization and how this gap is reflected in the role corporations consider that they should play towards society.

Finally, Chapter 8 presents the main conclusions attained in this research and highlights its distinctive contributions.
CHAPTER 2. PORTUGAL - ECONOMIC AND MANAGEMENT ENVIRONMENT

2.1. INTRODUCTION

This chapter aims to introduce the Portuguese economic and management environment. It starts by briefly presenting the evolution of the Portuguese economy and political regime. This chronological journey is interesting not only for the sake of historical record but because it permits to understand the peculiar features of Portuguese enterprises such those to be studied further on. Special attention is given to education, welfare and employment structure as these are important constituents to foster social policies. Public social policies, together with flexible workplace practices and individual decisions, are the instruments for the reconciliation of work, personal and family life and the personal fulfilment in these different activities (OECD, 2005).

Portugal, as any other country and culture, has had its own idiosyncrasies throughout its history, most of which are reflected in (or reflect) its economic history. Moreover, political, structural and institutional factors affect the management of organizations. According to Mauro Guillén, in his book Models of Management (1994), the dominant pattern of politics sets limits to the repertoire of organizational approaches that are either possible or necessary, while other factors like the characteristic mode of thought affects the choice of alternatives by managers and firms. Furthermore, in the same book, following a cross national approach, Guillén shows that different countries follow different paths and steps in terms of the organizational evolution process. In addition, the author presents evidence that the three variables he uses for characterizing organizational problems (structural changes, international pressures or opportunities and labour unrest) plus the four institutional factors (business-elite mentalities, professional groups, state involvement and workers’ responses) jointly configure the conditions under which a particular outcome (for example, the degree of adoption of an organizational paradigm) is observed to occur (Guillén, 1994). These factors will be invoked to describe the evolution of the Portuguese economic environment and managerial practices.

Models of organization and management are basic constituents for important variables such as motivation, productivity and, ultimately the firm’s success. This fact not only concerns individual and social well-being, at a microeconomic level, but also constitutes
an essential issue to a country’s economy, at a macroeconomic level. Harmonizing work and family life can contribute to increased personal stability and productivity (e.g. Kossek and Ozeki, 1998). Thus, potentially, higher levels of productivity can be achieved by firms providing work-family life policies. It is also plausible to assume that it contributes to reduce poverty, solve governmental problems related with pension systems' bolster and other problems that can arise because of demographic problems such as declining fertility rates (OECD, 2005). On the other hand, macroeconomic background and institutional paradigms may affect the discussion of management’s models and its implementation (Guillén, 1994), and, consequently, firms’ initiatives on work-family balance.

Most literature (e.g. Mateus, 2006, Lopes, 2002) on recent Portuguese economic history is unanimous on considering that the economic problems of the country were always related with a wrong aggregate demand management and unsustainable indebtedness, and specially not accompanied with an expansion of the aggregate supply due to a strong lack of productivity and competitiveness (Mateus, 2006). The problem of productivity has been playing a huge role in the development of Portugal and, hence, the relevance of work and family debate on the Portuguese scenario.

The political revolution that occurred on 25th April 1974 not only paved the way to democracy but it significantly changed the country’s economic environment. However the recent evolution of the Portuguese economy can only be understood when illuminated by the period beginning with the preceding autocratic regime, Estado Novo, especially after 1950.

César das Neves, in his book “The Portuguese Economy: A Picture in Figures, XIX and XX Centuries with Long Term Series” (César das Neves, 1994) sums up the evolution of the Portuguese economy (see Figure 1) as follows: “In a few words, this is the picture of the economic evolution of Portugal in the last century and a half: a small open country which only started “modern economic growth” during the “golden age” of the 1950-60's, changing then from an old rural economy to a modern structure. This was done without large financial instability and a clear option for openness. This process is still evolving.” (page 38).
2.2. BACKGROUND

2.2.1. GEOGRAPHY

Mainland Portugal is geographically located in Europe’s West Coast, on the Iberian Peninsula, occupying, today, an area of roughly 89 000 km². It is bordered by Spain to the North and East and by The Atlantic Ocean to the West and South, making it a privileged geo-strategic location between Europe, America and Africa. In addition to the mainland, Portugal’s territory further comprises the Autonomous Regions of the Azores and Madeira, two archipelagos located in the Atlantic Ocean, totaling an area of 92,094 km² (AICEP, 2010).

2.2.2. POPULATION

Portugal’s population is estimated at 10.8 million people of whom 51.6% are female. The Portuguese population is comprised of 15.2% young people (under 15 years old), 17.8% elderly (above 64 years old) and 67% active age people. The potential sustainability index (number of active age people per old person) is 3.8, at present, and shows a tendency to decrease.

The first population census ever carried out in Portugal took place in 1864. Figure 2 shows the evolution and growth rates of the Portuguese population.

Source: (César das Neves, 1994)

Figure 1 – Portugal – Global Picture, 1800–2000
As it can be observed, the national population recorded a fairly moderate growth rate between 1864 and 1920, increasing from 4 million in 1864 to 6 million in 1920, corresponding to an average annual growth rate of 0.65 per cent. After 1920, there was a sharp increase in population growth, which continued until 1950, reaching the number of 8.5 million inhabitants. After this date, the population continued to grow but at more moderate rates, and inclusively declined between 1960 and 1970 as a result of the high rates of emigration and the colonial war, as it will be described. The period between the two censuses in 1970 and 1981 recorded the highest growth rate in the whole of the period (1.3 per cent per year). According to Nuno Valério (2001), this sharp growth can be attributed to the combined effect of three factors: the return of approximately five hundred thousand Portuguese citizens from the ex-colonies; the return of a considerable number of emigrants; and the impossibility of emigrating due to the anti-immigration policies pursued by the main countries that had previously welcomed Portuguese emigrants. During the last decade, the growth rate stagnated and remained very close to 0 per cent.
### Employment rate (15 to 64 years)

<table>
<thead>
<tr>
<th>GEO/TIME</th>
<th>Employment rate (15 to 64 years) Females</th>
<th>Employment rate (15 to 64 years)</th>
<th>Part-time workers in % of total employment Females</th>
<th>Workers with temporary contracts in % of total employment Females</th>
</tr>
</thead>
<tbody>
<tr>
<td>European Union</td>
<td>64.1</td>
<td>58.2</td>
<td>31.9</td>
<td>14.6</td>
</tr>
<tr>
<td>Denmark</td>
<td>73.4</td>
<td>71.1</td>
<td>39.0</td>
<td>8.8</td>
</tr>
<tr>
<td>Germany</td>
<td>71.1</td>
<td>66.1</td>
<td>45.5</td>
<td>14.9</td>
</tr>
<tr>
<td>Estonia</td>
<td>61.0</td>
<td>60.6</td>
<td>14.5</td>
<td>2.8</td>
</tr>
<tr>
<td>Cyprus</td>
<td>69.7</td>
<td>63.0</td>
<td>12.7</td>
<td>20.5</td>
</tr>
<tr>
<td>Netherlands</td>
<td>74.7</td>
<td>69.3</td>
<td>76.5</td>
<td>19.9</td>
</tr>
<tr>
<td>Austria</td>
<td>71.7</td>
<td>66.4</td>
<td>43.8</td>
<td>8.8</td>
</tr>
<tr>
<td>Portugal</td>
<td>65.6</td>
<td>61.1</td>
<td>15.5</td>
<td>23.6</td>
</tr>
<tr>
<td>Slovenia</td>
<td>66.2</td>
<td>62.6</td>
<td>14.7</td>
<td>19.3</td>
</tr>
<tr>
<td>Finland</td>
<td>68.1</td>
<td>66.9</td>
<td>19.6</td>
<td>18.4</td>
</tr>
<tr>
<td>Sweden</td>
<td>72.7</td>
<td>70.3</td>
<td>40.4</td>
<td>17.6</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>69.5</td>
<td>64.6</td>
<td>43.3</td>
<td>6.5</td>
</tr>
<tr>
<td>Iceland</td>
<td>78.2</td>
<td>76.2</td>
<td>34.9</td>
<td>12.8</td>
</tr>
<tr>
<td>Norway</td>
<td>75.3</td>
<td>73.3</td>
<td>42.9</td>
<td>9.8</td>
</tr>
<tr>
<td>Switzerland</td>
<td>78.6</td>
<td>72.5</td>
<td>60.6</td>
<td>13.2</td>
</tr>
</tbody>
</table>

Source: Eurostat

**Table 1 - Employment rate, part-time and temporary contracts, 2010**

Concerning the distribution of labour force, see Table 1, at present, the employment rate has been declining but it is similar to the European Union average. Traditionally, the percentage of female employment has been high compared with other European countries. However, unlike other European countries with the same rate of female employment, women tend to work full-time: the percentage of women working part-time is much lower (15.5%) than in the other countries. Also the percentage of women with temporary contracts (23.6%) is higher than the European average.

### 2.2.3. POLITICAL STRUCTURE

The Republic of Portugal is a parliamentary democracy based on the respect and guarantee of the fundamental rights and liberties and in the separation and interdependency of powers as stated in the Portuguese Constitution. Under the Constitution, sovereign powers are vested in the President of the Republic, the Assembly of The Republic, the Government and the Courts.
2.2.4. ECONOMIC STRUCTURE

The tertiary sector is the dominant sector in the Portuguese economic structure. In 2008, agriculture, forestry and fishing generated 2.3 per cent of gross value-added (GVA) and employed 2.3 per cent of the labour force. The industrial, construction, energy and waters sectors generated 22.3 per cent of GVA and employed 28.5 per cent of the working population. The services sector generated 75.4 per cent of GVA and employed 60.5 per cent of the labour force (INE, 2010).

The services sector consist of very heterogeneous activities: from those greatly dependent on technological progress as transport and communications, to those based essentially on labour and the use of more traditional techniques such as education, tourism and public administration (Lopes, 2002).

- Growth in public administration took place, in general, after the reforms and the creation of new public systems, namely in education, health and social security.

- Tourism industry, driven by Portugal’s geographic position and its mild climate, is also a growing economic activity.

- The transportation sector has undergone profound transformations in this period. Rail transportation, except for interurban passenger traffic, lost importance relatively to air and road transport. Also the financial liability of some nationalized companies has hampered profitability and the privatisation of the sector.

- The evolution of the utilities sector has been pretty tumultuous, from technological developments to the liberalization and globalization of the sector.

- The financial sector, since 1980, has evolved towards the liberalisation of the sector and it currently is one of the mainstays of the dynamics of the Portuguese economy.

- Finally, the retail sector is characterised by the evolution of its intrinsic structure, from a set of approximately 140 000 small family-run shops and warehouses, in 1990, to a panorama consisting of large networks of hypermarkets. Excluding the financial sector that is responsible for 17% of the employment, the retail sector employees 16% of the employed population.
2.3. RECENT ECONOMIC HISTORY

2.3.1. 1950 – 1973 - THE ESTADO NOVO

Until the first half of the 20th century, Portugal was unable to join the economic modernization process happening in other European countries thanks to the Industrial Revolution (Mata and Valério, 2003). This stagnation was mainly due to the many political disturbances: the end of monarchy, establishment of the republican regime, World War I, establishment of the autocratic regime and World War II.

Between the end of World War II and 1973, the economic Portuguese scenario changed. This is a period of great economic development. The Portuguese economy not only improved its performance but it also remarkably shortened its distance with regard to more developed economies.

The majority of Portuguese authors are unanimous in recognizing this positive evolution, (e.g. Pintado, 2002, Amaral, 2010, Mateus, 2006, César das Neves, 1994, Lopes, 2002). Foreign authors (e.g. Chenery and Syrquin, 1975, Baum and Tolbert, 1985) seem to consider Portugal as one of the best examples of the “golden age” growth.

2.3.1.1. POLITICAL REGIME

After World War II and until 1974, whilst western European countries were consolidating their liberal democratic regimes, Portugal maintained an autocratic regime, Estado Novo. Also diverging from the European trend, Portugal maintained its colonies, in Africa (Angola, Mozambique, Cape Verde, Guinea-Bissau and São Tomé and Príncipe) and Asia (East-Timor). Problems with the African colonies generated a civil war that started in 1961. War expenditure involved a large financial and human capital allocation though it also presented huge opportunity costs (Salgueiro and Amador, 2009). In consequence of the war, this decade was also marked by the strongest emigration movement in the Portuguese history.

These phenomena - the autocratic regime, the war at the colonies and the emigration - generated important societal and economic consequences.

Socially, both colonial war and emigration caused a strong decrease in the active population range.
Regarding the financial sector, due to the emigrants’ remittances (Sousa, 1995), the banking activity was significantly developed. Also at this time, large family owned industrial groups established bank institutions, mainly to finance their own industrial investments (Lains, 2008).

The political regime defined itself as a corporative regime, with a strong supervision from the state (Amaral, 2010). The state also promoted several protectionist policies and labour regulation, like wages control, aiming to benefit the Portuguese industry (Lopes, 2002).

2.3.1.2. ECONOMIC DEVELOPMENT

After World War II, and having controlled the inflation, government defined and implemented the so called Planos de Fomento (Development plans consisting of investment maps for every industrial sector and mandatory measures to the public sector). The investment and the strategic options undertaken are presented in Table 2.

<table>
<thead>
<tr>
<th>I Plan (1953-58)</th>
<th>II Plan (1958-64)</th>
<th>Int. Plan (1965-67)</th>
<th>III Plan (1968-73)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Investment (10(\text{esc}))</td>
<td>7.6</td>
<td>21</td>
<td>35.5</td>
</tr>
<tr>
<td>% GP of first year †</td>
<td>15.2%</td>
<td>33.3%</td>
<td>64.4%</td>
</tr>
<tr>
<td>%GFCF of first year †</td>
<td>93.4%</td>
<td>180.8%</td>
<td>315.4%</td>
</tr>
</tbody>
</table>

Percentage applied in:

<table>
<thead>
<tr>
<th>Area</th>
<th>I Plan</th>
<th>II Plan</th>
<th>Int. Plan</th>
<th>III Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture, Fishing</td>
<td>17.0%</td>
<td>17.3%</td>
<td>8.0%</td>
<td>15.1%</td>
</tr>
<tr>
<td>Industry</td>
<td>11.6%</td>
<td>27.4%</td>
<td>43.0%</td>
<td>25.2%</td>
</tr>
<tr>
<td>Energy</td>
<td>34.6%</td>
<td>21.4%</td>
<td>16.0%</td>
<td>14.7%</td>
</tr>
<tr>
<td>Transports and Communications</td>
<td>32.1%</td>
<td>30.8%</td>
<td>18.0%</td>
<td>22.2%</td>
</tr>
<tr>
<td>Teaching, Research</td>
<td>2.1%</td>
<td>3.0%</td>
<td>2.5%</td>
<td>4.6%</td>
</tr>
<tr>
<td>Tourism</td>
<td>--</td>
<td>--</td>
<td>2.8%</td>
<td>9.7%</td>
</tr>
<tr>
<td>Health</td>
<td>--</td>
<td>--</td>
<td>1.0%</td>
<td>1.9%</td>
</tr>
<tr>
<td>Housing</td>
<td>--</td>
<td>--</td>
<td>5.4%</td>
<td>6.6%</td>
</tr>
</tbody>
</table>

† the values for the intercalar plan were doubled, due to the halving of its period

Source: Adapted from (César das Neves, 1994)

Table 2 – Planos de Fomento

Since the first plan, emphasis was on industry, (regulated) private sector and external relations, with special attention to infrastructures (e.g. electricity, dams, transports, communications) as a mean to leverage investment and economic development.
The second plan shows a clear option for industrialization and urbanization and a decrease in the relative weight of agriculture. The two latter plans open the economy to foreign capital and cooperation with foreign firms.

In fact this period, as other periods of more economic prosperity in Portugal, coincides with a greater international openness. The co-foundation of the European Economic Cooperation Organization (EECO) in 1948, predecessor of the European Economic Community (EEC); the accession to European Free Trade Association (EFTA) in 1959 and the signature of a trade agreement with the EEC, in 1972, where some of the facts that demonstrate a consistent, yet timid, trade liberalization and the integration with Europe, especially after the late 60s.

Figure 3 shows an evolution. In 1950 (Amaral, 2010), agriculture occupied approximately 50% of the employment, industry 23% and services 26% and their contribution to GDP was approximately 28%, 34% and 38% respectively. In 1973 (Lopes, 2002), the distribution of the employment was 25%, 35% and 40% respectively and the structure of GDP was 12%, 41% and 47% for those same sectors.

Source: Adapted from (Amaral, 2010) and (Lopes, 2002)

**Figure 3 – Portugal - Employment and GDP structure per economic sector in 1950 and 1973**

Economic policy and the expansion of the market (the African colonies and, with the participation in international markets, other EFTA) actively stimulated industrial progress. Given the introduction of technologically more advanced equipment, the application of modern management techniques and the entrance into new industrial sectors technologically more advanced and efficient, the expansion in different industrial sectors was very fast. However, the population employed in the industry registered an
increase above the correspondent in GDP, reflecting that the Portuguese industry intensive factor was labour (Bonfim and Neves, 2002, Mateus, 2006).

In addition to State protected/owned industries (fertilizers, steel, pulp), there was also an expansion in industries such as cement, textiles, oil refining, breweries, tobacco, canned fish and cork as well as machinery, electrical and transportation material (e.g. Lopes, 2002).

Tertiary sector grew mainly through public services, namely transport, communications, commerce, education and health (César das Neves, 1994).

2.3.1.3. EDUCATION AND WELFARE

This period was also the first consistent and successful effort to reduce illiteracy in Portugal: in 1930, illiteracy was about 30% for over 7 years old, while in 1970 stood at about 26% (Valério, 2001). Although it is considered a high percentage in international terms, it should be noted the large reduction effort. The expansion of secondary education was also quite pronounced. These results were due to the implementation of a free, public system of education for the entire population.

In the area of health, there were also significant improvements, as it can be seen from the indicators presented in Table 3.

<table>
<thead>
<tr>
<th></th>
<th>1930</th>
<th>1970</th>
</tr>
</thead>
<tbody>
<tr>
<td>Life expectancy at birth years</td>
<td>38</td>
<td>67</td>
</tr>
<tr>
<td>Child mortality %</td>
<td>144</td>
<td>51</td>
</tr>
</tbody>
</table>

Source: adapted from (Valério, 2001)

Table 3 – Demographic indicators 1930-1970

Unlike education, this development was not achieved based on any public health or welfare system. Contrary to what had been done in many of the European democracies, the Estado Novo did not adopt the welfare State model, deeply associated with the establishment of social policies. Portugal would adopt it later, after 1974.

Historically, many of the social policies were fostered by popular pressure (Wren, 2005), but in Portugal, the existing political system was immune to such movements (Amaral,
2010): it dealt with a docile workforce without rights, not allowed to go on strike and associated trade unions without freedom of action. Thus, such improvements in health conditions were mainly linked to economic growth, responsible for the overall improvement of living conditions and public hygiene (Amaral, 2010).

However, as pointed by Maia (1998), throughout the second half of the XIX century, based on the vigorous workers’ associations, particularly in the major industrial-urban centers, an important movement was born that stimulated the rapid growth of the number of mutual insurance associations and their members.

In 1935, the publication of the National Labour Law was approved, which defined the general bases that would support the creation of a social security system.

The labour legal framework and the mutual insurance associations covered progressively more employees, from trade, industry and services. The system provided welfare provision to prevent poverty in cases of illness, disability, old age and death as well as medical care. Grants were also provided to those with dependent children. Unemployment was not included (Maia, 1998).

In 1962, the social security system was revised and improved: the scope was amplified to eventualities not covered before; the benefits scheme became more comprehensive. The funding was supported by the contributions of workers and employers, but with no financial contribution by the State (Maia, 1998).

2.3.2. 1974 ONWARDS – MODERN ECONOMY

2.3.2.1. POLITICAL AND ECONOMIC DEVELOPMENT

1974 and 1975 were years marked by great upheavals, both internal and external. Internally, the revolution of 25th April 1974 began a process of radical political change towards the democratization of the Portuguese society. Externally, a deep international crisis followed the oil crisis of 1973 (Mateus, 2006).

The revolution of April 1974 finished with almost fifty years of an authoritarian regime. It started the process conducting to a free, democratic political regime. It also initiated the process of decolonization, which caused the returning of near 600.000 people from the ex-colonies during 1975 and 1976.
The most emblematic measures from this period were the nationalizations of firms, the implementation of a public welfare system and a new labour framework. All banks and insurance institutions were nationalized and, indirectly, more than 1000 firms in which these had participations. All major economic groups were eliminated. Apart from those already state-owned, a set of economic sectors became centralized and state-controlled: banking, insurance, iron and steel, shipbuilding and maintenance, cements, paper and paper pulp, chemicals and petrochemicals and electric power (Amaral, 2010).

By the end of 1975, democratic institutions were working and political instability receded: the fifteen governments which Portugal had in the eight years from 1974 to 1981 were replaced by four in the next ten years (1982-1991) (César das Neves, 1994).

These various Governments sought to restore the confidence of national and foreign entrepreneurs in the political system, through a set of institutional reforms that were initially implemented, such as: limitations to nationalizations (1977, 1989), with the privatization of some firms (including the majority of banks and insurance institutions); opening of the public companies to private management, with minority shareholding of private capital in certain public sectors (communications and public transport) and creation of non-public financial institutions (1982).

Furthermore, several policies conducting to liberalization were launched such as the elimination of the protectionism against external competition: elimination of state monopolies in import products like, for instance, cereals and codfish; elimination of quotes and fixed prices in fuel products; the improvement of competition laws; the liberalization of the utilities’ sector and, concerning tax policy, the application of tax smoothing (tribute goods at low levels) (Lopes, 2002).

Also during this period, three events were of capital importance for the Portuguese economic history and its convergence to Europe:

- Two agreements (1978, 1980) were signed with the International Monetary Fund (IMF), aiming for economic stabilization.

- Accession to European Union (EU) (1986) followed by the accession to the Economic and Monetary Union (EMU), with the inclusion in the Euro zone, in 2000.
The Portuguese entrance to this set of countries had immediate economic consequences: the existing protectionist barriers were forced to disappear, funds were transferred for infrastructure development and upgrading of the workforce and a set of economic and trade regulations common to all Member countries had to be adopted (Mateus, 2003). However, after integration in Euro, in 2000, the effect of the common monetary policy has proved to be too painful to the Portuguese economy (Lopes, 2002).

During this period, the contribution of the agriculture to the Portuguese economy continues to lose importance. Although there is an improvement in productivity thanks to the reduction of sown area, the mechanization and the use of selected seeds and livestock breeds, fertilizers, insecticides and pesticides, other adverse factors were of great importance, for example, ageing – in 1989, 34 per cent of the agricultural workforce, was more than 55 years old and 17 per cent more than 65 years old – illiteracy and lack of technical qualifications (Lopes, 2002).

The European integration was a decisive factor for the structural evolution of industry. Comparative advantage in exports was based essentially on production costs determined by low-wage (clothing, footwear and textiles) or advantages in access to raw materials (wood and cork). In industries more dependent on scale economies, products differentiation and technological sophistication, the national industries failed, so far and in general, to outcompete.

However, the development of the tertiary sector is the most consistent trend of the evolution of the Portuguese economic activities.

**2.3.2.2. WELFARE AND EMPLOYMENT**

Just after the revolution, a package of employment policies was implemented:

- Salaries increased 30% in one year. This fact led to serious economic imbalances mainly because the manufacturing process, highly labour dependent, was not prepared to absorb such an increase (e.g. Lopes, 2002, Amaral, 2010).
- The minimum salary was introduced; Christmas and vacation extra-months salaries were introduced; working hours were reduced, and vacation period was extended.
In addition, collective bargaining was widespread, freedom of association was introduced and the right to strike legalized.

In terms of labour market, the economic impact of wages explosion and super-employment during the revolutionary period created structural problems to productivity. During the period of 1974-1992, productivity of labour dropped from an annual growth of 7.5% before 1974 to 1.6 per cent (Lopes, 2002).

A major consequence was the adoption of an exchange-rate policy whose main objective was to reduce its impact, in order to ensure the competitiveness of exports. This strategy would be viable from 1990 until the accession to the Euro and the adoption of the common exchange rate and monetary policy. By then, many Portuguese industries used to that strategy, were not sufficiently prepared for the European and global competition, with indexes of much higher productivity, so they became unviable and closed.

Another consequence was the high labour unrest because of, on one hand, the unions became heavily politicized and, on the other hand, wage increases had often to be traded below the value of inflation (which reduced real wages). These lengthy and agitated negotiation processes would also aggravate the problem of national productivity.

Concerning welfare, in 1977, a reorganization effort was initiated aiming for the transition to an unique and universal public social security system (Maia, 1998). At the same time, the enlargement of the social protection’s scope was continuing, namely covering unemployment situations for the first time.

Since 1980, the funding of the system was ensured not only by contributions from employers and employees but also by the State. This fact was owed to the creation of a non-contributory regime aiming to prevent situations of economic or social poverty not covered by the general system. Meanwhile, due to the growth of financial pressure, the retreading of some initiatives was undertaken (Maia, 1998).

In accordance with European directives, social protection to maternity, paternity and adoption has been substantially amended, namely longer and better parental leaves and allowances.

In 2009, a new Labour Law was approved (DR, 2009). Concerning, for example, parental leaves, such law establishes the following: the mother was entitled to paid maternity leave
of 120 days (or 150 days paid 80 per cent) and the father was entitled to paid paternity leave of 15 days. Of the maternity leave, 6 weeks were compulsory, while the rest of the time may be taken either by the mother or the father. Parents had also the right to work part-time or with flexibility of time, until the child is 12 years old, meaning that if someone applied for that option the organization could not refuse to grant it.

2.4. EVOLUTION OF MANAGEMENT

2.4.1. EARLY MANAGEMENT PRACTICES

During the XIXth century, several industrial associations were born - Sociedade Promotora da Indústria Nacional (1822), Associação Industrial Portuguesa (1837), Associação Industrial Portuense – AIP (1852) and Associação Promotora da Indústria Fabril (1860). They were created by industrial owners, illuminated by the ideas that they came across in France and in England.

Men of science were also appointed as members of these associations, as these associations aimed to promote the economic development of Portugal through the increment of technical education and spreading of applied scientific knowledge. In their chambers took place the early management debates.

It was not possible to set up industrial factories in accordance with the most modern scientific and technical principles without the existence of skilled workers, or at least with some technical training. So the lack of skilled workers and retaining key workers were already a major problem.

Another problem was the high rate of illiteracy among the working class and the lack of a public state technical education. This led to the establishment of the first Portuguese vocational educational institution, the "Industrial Portuense", a pioneer school created by the AIP in 1838 (Matos, 1996). The objective of AIP was the creation of a vocational practical education, as mentioned by its chairman: “in the study of applied sciences for industry, in industrial science, oral lessons are not enough: the remarks are indispensable, manipulations and experiences and work carried out by students constantly supervised by the teachers’ views are necessary; libraries, offices with machinery and models and finally workshops are also necessary” (Matos, 1996 page 404).
It was also his understanding that scientific and technical knowledge acquired in schools could and should be supplemented by the information acquired by the press and by visits to industrial exhibitions and museums. So, that same year, this same association released the first issue of a publication with industrial and technological information, "Jornal da Associação Industrial Portuense".

During this period, also some professionals’ bodies were born, namely the Civil Engineering Council, in 1868, aiming to carry out activities with large impact on vocational training of Engineers.

2.4.2. 1950 – 1973 - THE ESTADO NOVO

Only after 1950, the Portuguese economy accelerated and industrialization, international integration and modern economic growth began. So even though literature in Management had developed widespread all over the world, little and sparse work on the subject was developed in Portugal by then.

It could be suggested that the Portuguese enterprising and managerial realities are similar to the Spanish ones. Indeed, Spain also presents a late industrialization in a corporatist regime (Guillén, 1994) and modern management and organizational theories only flourished in the eighties. However, the comparison with Spain is not the best as several differences can be noticed. Firstly, the Spanish regime, perhaps affected by the civil, was much more closed and isolated. Secondly, Spain had to defrost huge problems with labor unrest, while in Portugal labour unrest was quite sporadic and non relevant during this period.

Models of management applied in Portugal until the mid seventies were a mix of paternalist management and scientific management, either in state-owned or private firms. Actually, in the end, the model was the same for both types of firms, as the Estado Novo consolidated an interventionist, corporatist and paternalist model of labour relations in which free collective bargaining was not feasible.

Major manufacturing firms were owned either by the State either by family economic groups. In these firms, with a very high degree of bureaucratization and managed by engineers, scientific management was easily adopted, as a technique but also as an ideology (Wren, 2005). These engineers were middle and top managers and they were, normally, salaried directors. This fact is important as these managers stance was mostly in
line with agent or fiduciary theories. They view themselves materializing the concept of management as trustee of the owners’ property with limited chartered powers (Jensen and Meckling, 1976).

Owners were business leaders. They occupied much of their time doing business and lobbying Government rather than routinely managing their own enterprises. Normally these business men had a quite paternalist relationship with their employees. They were a mixture of humanitarianism, philanthropy and business acumen (Wren, 2005). Alfredo de Sousa, owner of a group that included steel, fertilizers and other chemical industries, whenever he would build a new factory, he used to create a complete town for the employees, with hospital, school, church, playgrounds and else on the premises of his factories. Some medium Portuguese cities owe their growth and development to this policy (Lisboa, 2002). In 1930, a major retail firm was the first company to pay a Christmas bonus to its workers and to install a canteen in its premises in the centre of Lisbon. Common examples are also the sponsorship of local community, in general or as provision of, for example, hospitals, schools and cultural and recreation facilities, some of them built in the plant’s surroundings (Lisboa, 2002).

They were also concerned with the managerial skills of their engineers and so they would send some of their managers abroad, probably those with high potential, to be educated on management. They tended to go to the United States, namely Harvard Business School and MIT. Such engineers came from major engineering universities.

By then, the most prominent was the Faculty of Engineering of the Technical University of Lisbon (IST) aimed at forming a new class of engineers, following the German model of engineering teaching. Highly focused on technical effectiveness, it advocated more efficient processes, technical innovation and training.

Not all of the business leaders were like that. Manuel Lisboa, in his book about the Portuguese manufacturing industry and their leaders (Lisboa, 2002) categorizes business leadership into three different functions that shape the way of running the firm: capitalist, entrepreneurial and management.

The capitalist is a profile that is normally associated with firms created during the 1950-60 decade, labour intensive industries, feebly mechanized, with an effective application of Scientific Management. Normally, they owned firms with a limited number of employees,
simple organizational structures and no systematic plans regarding strategy, trade, finance, etc. Their main characteristic was to bear financial risk. They had huge authority and non-innovative behaviours. Normally, they used to develop a paternalistic relationship with the employees.

Typical managers are associated mainly with bigger firms. They revealed higher dynamism. They tended to have innovative behaviours in the firm. With a more open profile, they developed their industrial activity more professionally. Graduate workers and technicians, participation and internal communication were encouraged in their firms. They demonstrated a great propensity to adopt all the theoretical management paradigms referred by Guillén: Scientific, Human Relations, Structural Analysis, (Guillén, 1994).

Entrepreneurs are presented as having a mixture of the two previous profiles. They tended to use much more information systems, financing sources and organizational participation as managers. But, as the capitalist profile, they were often found at small-medium firms, limited to national markets.

As times went by, a business elite, mainly influenced by the catholic intellectual heritage, came to support a human relations approach to organizations. They embraced it as an ideology and they acknowledged a more sensitive approach towards labour problems and more responsible towards the workers as a good practice of management (Guillén, 1994).

However economic growth was the dominant goal. Economic development theories were actively flourishing. Academics and business debates gave emphasis to the discussion of investment policies and the structure of the economy (Lopes, 2002). Moreover, the Portuguese Social Catholic movement failed to organized effective catholic trade unions as in the German and Belgian examples (Guillén, 1994). Both factors hindered the adoption of this model in practice, by that time.

That same business elite led to the launching, in 1972, of the first degree in Management at the Catholic University of Lisbon. The structure and content of this degree had a clear American influence.

It is worth noting that Catholicism was not the only intellectual influence that supported a human relations approach, Portuguese liberal-humanist and socialist intellectuals present equally powerful justifications for the adoption of such model. But the political regime confined these debates to the intellectual elite (Guillén, 1994).
2.4.3. 1974 ONWARDS – MODERN MANAGEMENT

After the period of political instability, the propriety of the major firms changed several times because of nationalization and reprivatisation (Mateus, 2006).

Many engineers were promoted or appointed to top management positions, whilst the first Portuguese graduates in management were entering the labour market. Middle management was also occupied by engineers. This new engineering class suffered the problems of labour unrest. They felt at easy with structured approaches and thus the spreading of the Structured Analysis approach was very fast, namely as a technique for implementing change processes.

The first Master of Business Administration was launched in 1990 at the Catholic University of Lisbon, again adopting the American model of management education. By then, with the opening of the political regime and the liberalisation of the economy, modern management theories had invaded Portugal. A couple of firms were preparing themselves to enter the stock market; others were paving the way to the internationalisation and all of them were fiercely struggling their way due to globalisation. Management became a multifaceted discipline and managers, normally, are no longer amateurs (Lisboa, 2002).

2.5. CONCLUSION

This chapter described the evolution of the economic and management environment in Portugal. Most literature (e.g. Mateus, 2006, Lopes, 2002), on recent history of Portuguese economy, is unanimous on considering that, besides other structural economic problems, such as the unsustainable indebtedness, the problem of productivity of competitiveness has been playing a critical role in the development of Portugal and, hence, the relevance of work and family debate on the Portuguese scenario (OECD, 2005).

Still the problem of labour productivity continues and is not a simple efficiency, technology versus people scenario.

A recent study from Nicholas Bloom and John Van Reenen comparing the quality of management in 732 medium-sized manufacturing firms in Europe and the United States, including Portugal, present interesting evidence that persistent differences in productivity, at the firm and the national level, reflect variations in management practices (Bloom and
van Reenen, 2007). In a complementary research (Bloom and Van Reenen, 2010), they add that the reason for “economists have tended to shy away from management-based explanations for productivity differences is a sense that changing management seems a relatively straightforward process” (page 204). The study also suggest that management differences are rooted in deeper informational, social, legal, and technological differences and, at the end, there is always “a combination of imperfectly competitive markets, family ownership of firms, regulations restricting management practices, and informational barriers allowing bad management to persist” (page 204).

The authors conclude, and the conclusion is also applicable to Portugal, that “Thus far we have been assuming that management resembles a technology and there can be technical progress in management, just as there is for machines. An alternative perspective is that all management practices are contingent on the firm’s environment (e.g. Woodward, 1958). In this view, every firm is adopting its own best practices given the circumstances in which it finds itself. But with these elements of contingency readily acknowledged, our work suggests that contingency is not the whole story... It seems likely that many aspects of management style are not contingent. Certain practices like basing promotion largely on nepotism or keeping workers at the same job without any regard to a worker’s performance are unlikely to be productivity-enhancing in any economy” (page 221).

As a bridge to the scope of this thesis, these same authors show, in a companion paper (Bloom et al., 2006), that overall management score is strongly positively correlated with many pro-worker features of firms, such as more generous childcare subsidies and better work-personal and family life balance indicators. They also explain that indicators of good management and work-family life practices are neither straightforward substitutes for each other nor strictly complementary. However workers may prefer working in well-managed firms with work-family life practices and productivity relies on better workers.
CHAPTER 3. WORK-PERSONAL / FAMILY LIFE POLICIES AT WORK

3.1. INTRODUCTION

This chapter overviews the evolutionary process of the emergence of work-personal/family life policies in the workplace. Due to different terminologies, in the outset of the chapter, the boundaries of work-personal/family life arena will be discussed.

Modern management thought related to academic research in this field will also be presented. Research on this topic has evolved over time reflecting social, economic and workplace developments and concerns, shifting in response to new trends (Zedeck and Mosier, 1990). For example, as the number of women entering the labour force grew, since 1960, research, in certain contexts, tended to focus on “working mothers” or “dual earner families”, while concerns about stress and burnout associated with workplace changes in the 1980s and 1990s were reflected in research and debate about work–family conflict (Lewis et al., 2007).

Moreover, literature concerning antecedents of organizational initiatives for balancing work and home demands and outcomes for the organization, the employee’s family life and the individual will be reviewed. Though exhaustively studied, the fact is that efforts, drivers and consequences of juggling work and family commitments in new changing contexts is a highly dynamic reality which makes it a recurrent theme to be refreshed. Indeed, profound changes in the nature of work and work dynamics, globalization, organizational reorganization and efficiency drives are presenting new problems that demand to be studied (Kanter, 1993).

Additionally, further concepts, such as work-family culture and employees’ perceptions that come into play when considering the effectiveness of such organizational strategies, will be outlined.

This will lead to the conclusion with the overarching question: does the way in which work-family life policies are framed and introduced by an organization influence how employees perceive and used them?
3.2. DEFINING WORK - PERSONAL / FAMILY LIFE ARENA

There has been a fruitful debate over concepts such as “work”, “family” and “personal life” as well as a set of themes related to them in research (e.g. Kanungo and Misra, 1984, Zedeck, 1992).

Is the concept of “work” restricted to tasks associated with paid employment or does it also include task-related activities that are not associated with financial gains (e.g. volunteer work and housework)? This question takes us to an interesting discussion about the very definition of “work” or “busy-time” in contrast with “leisure” or “free-time”. For example Kabanoff defines leisure as “a set of activities that individuals perform outside of their work context and excludes essential maintenance functions” and adds that “these activities, although including some element of perceived choice, once chosen, involve the actor in performing a fairly clearly prescribed set of tasks or operations. In contrast to the work setting, leisure activities are primarily carried out in the pursuit of personally valued goals or in the expectation of fulfilling individual needs rather than in return for monetary reward” (Kabanoff, 1980, page 69). In this sense, according to this author, leisure activities may be work related if the actor perceives such activities to be personally meaningful, irrespective of any monetary gain directly contingent on these activities. In the same sense, essential functions and obligations one does have can be considered something different from leisure: “for example, if a man helps with household chores do we define it as leisure only if it is not the role obligation of a married man?” (Kabanoff, 1980, page 68).

While elaborating about work and leisure, Rapoport and Rapoport, consider leisure as time one has for his cultural and personal plasticity and conclude that, beyond the conceptual definition, the important is to examine “how individuals achieve a balance in their patterns of social participation among the different sectors of work, family and other interests” (Rapoport and Rapoport, 1974, page 228). In line with this thought and in what concerns this thesis, the focus is to examine how people actually balance needs, aspirations and satisfactions across different life spheres rather than trying to achieve a consensual definition of work / non-work concept.

Therefore, and because the interface between paid employment and family and personal enrichment is the kernel of this research, the definition of “work” will be restricted to the
domain associated with paid professional employment, no matter whether it is considered obligation or leisure and no matter what kind of working arrangements (e.g. full-time, part-time) are considered.

According to this rationale, also the essential concept of family will not be discussed. In what concerns this research, the family domain is defined reflecting the more suitable concept of family-life. The concept of family-life is understood in relation with “the policies and initiatives that promote the enrichment of the family in the accomplishment of shared goals and the occupancy of multiple familiar roles” (Eby et al., 2005).

The wide range of such policies and initiatives has been assumed under the generic term of “family-friendly” policies. In general, the aim of organizational interventions concerning such policies, fall into three main groups: (1) initiatives addressing working time and/or working hours; (2) collaborative action research focused on improving workplace equity and performance levels; and (3) initiatives to embed work-life balance within organizational cultures (Brough and O'Driscoll, 2010).

Such initiatives are translated and focus on four key human resource policies: (1) provision of employee services such as health and fitness centres, onsite childcare, and dry cleaning services; (2) provision of employee benefits such as leave entitlements (paid parental leave, career break and spouse/partner benefits) and financial assistance (childcare, maternity pay, and carers responsibilities, whether they are elder or children care) (Dex and Scheibl, 2001); (3) job restructuring such as job-sharing, location of work (workplace or home), part-time work and flexible work hours; and (4) organizational development initiatives such as supportive leadership development and diversity training (e.g. Feldt et al., 2000, Harrington and James, 2006).

Though it is recognised that, because of a variety of motives, not all flexible working arrangements are genuinely friendly to family enrichment (e.g. Houseman, 2001), the interest in more flexible work arrangements has been developed as a potential way of helping families and employers to cope with the real life problems of being carers and employees in a competitive business environment (e.g. Frone et al., 1992b, Kossek and Ozeki, 1998, Kinnunen et al., 2000, Daly, 2001, Dex, 2003, Frone, 2003, Mauno et al., 2007).
Family-friendly working policies and organizational environments were initially, and in most countries, a corporate led development motivated by national concern about the shrinking pool of labour caused by the declining fertility rate (e.g. Pitt-Catsouphes and Googins, 2004, Harrington, 2007), and in response to having women employees facing issues of family formation and development (e.g. Harrington, 2007, Crompton and Lyonette, 2006). While this first motivation was linked to women, there has been recognition that men as husband and fathers and other workers are also interested in, and can benefit from, flexible working arrangements, for a variety of personal and caring reasons (e.g. Menaghan and Parcel, 1990). Likewise, there have been growing pressures on companies and workplaces to become more efficient and more competitive in the global economy (Kanter, 1997). Simultaneously, family pressures from marital breakdown, increasing income inequalities, pressures on families to have two incomes and growing caring responsibilities have increased immensely. All these sets of developments are well charted in meta-analytic reviews (e.g. Greenhaus and Beutell, 1985, Greenhaus and Parasuraman, 1994, Kossek and Ozeki, 1998, Kossek and Ozeki, 1999, Voydanoff, 1988, Zedeck and Mosier, 1990, Allen et al., 2000, Frone, 2003, Lambert, 1990, Barnett and Hyde, 2001, Brough and Kalliath, 2009, Michel et al., 2010) and, nowadays, there is no doubt that societies face a challenge if they are to balance paid work and caring needs (e.g. OECD, 2005, Daly, 2001). It is therefore perhaps not surprising that, all over the world, government initiatives have emerged to address some of these issues. The role of governments and public policies is fundamental, but they are only part of the solution. They surely are an important actor, though just one of the actors. Organizations and individuals are also required to commit themselves in finding creative solutions in the business and social context we are living in (Kanter, 1993, Daly, 2001).

Recently, the term and concept of “family-friendly” policies has been largely replaced by a new term: “work–life balance” or “work-personal life balance”. There are numerous definitions and discussions on terminology within the literature (Fandre et al., 2009), and, in general, “Work–life” has a much wider focus as it includes all employees and different areas of engagement apart from paid work (e.g. family, sporting, recreational, community) (Kalliath and Brough, 2008). Gradually more and more, assessment of the interface between multiple life roles (and not only between professional and familiar roles) has been researched. The majority of the studies, so far, has been focusing on levels of role conflict and enhancement (e.g. Frone, 2003), levels of satisfaction, time, and
involvement (e.g. Greenhaus et al., 2003) and role salience and expectations (e.g. Carlson et al., 2009).

Common threads of meaning between the different work–life balance definitions can be found in academic literature. First, the notion that “perceptions of good balance” is important to the core meaning of the theme and consequently reframing research questions in accordance. Secondly, the realization levels of work–life balance can change over time according to the salience of specific life events and thus the way employees juggle over their period of employment is a dynamic reality. A more inclusive definition is given by Kalliath and Brough (2008): “Work–life balance is the individual perception that work and non-work activities are compatible and promote growth in accordance with an individual’s current life priorities”. Assessments on work–life balance should include individual preferences of current role salience, taking into account that individual work-life priorities can voluntarily change to enable development in non-work activities (e.g. private study, new baby, extended travel) and/or growth at work (e.g. working harder to gain formal work recognition, or promotion).

For the purposes of this thesis, the term “work-family” and “family-friend” has been retained and, when appropriate, reinforced with the term “family-responsible” because one of its aims is to correlate these policies with sustainability stances of the firms having in mind future generations, future talent pool of labour and the continuity of the firms. However, the analysed data is not restricted to workers with children - it spreads across the whole spectrum of workers - and it encompasses negative and positive associations relating to an individual’s work and non-work roles.

3.3. EVOLUTION OF WORK AND PERSONAL/FAMILY LIFE AS A FIELD OF RESEARCH

3.3.1. ROOTS AND EARLY WORK (1920S)

Though it traces its roots back to the existence of mankind, the interface between work and other, personal and familiar, scopes of our lives is generally considered to have begun as an academic discipline somewhere in the middle of the 20th century.
However, since the industrial revolution and the dawn of scientific management era, systematic organizational studies have been carried out paving the way to work-personal/family life arena.

The Industrial Revolution created management problems in the context of the factory system that led to the need of formal management studies and set the stage for the scientific management framework, based on rational ways of making decisions and not so dependent on the whims of a few (Wren, 2005).

Taylorism represented the summit of this movement. Taylor attempted to study human behaviour at work using a systematic approach. Factors like human characteristics, social environment, task, physical environment, capability, speed, durability, cost and their interaction with each other were thoroughly studied (Wren, 2005). His overall objective was to make work behaviour stable and predictable so that maximum output could be achieved. He relied strongly upon monetary incentive and reward systems, to motivate employees. Though he faced strong criticism, his work laid many foundation principles for modern management thought, introducing perspectives and concepts that go far beyond the technical side of manufacturing.

Between 1924 and 1932, Elton Mayo and Fritz J. Roethlisberger, both from Harvard Business School, led a landmark study of worker behaviour at Western Electric, the manufacturing arm of AT&T. Unprecedented in scale and scope, this study took place at the massive Hawthorne Works plant and generated a panoply of questions and theories about the relationship of productivity to the needs and motivations of the industrial worker.

Elton Mayo, while observing the six women involved in the Hawthorne study, found that they had became a team. Mayo concluded, in his classic writing in 1945, Social Problems of an Industrial Civilization, that (page 112) "...the eager human desire for cooperative activity still persists in the ordinary person and can be utilized by intelligent and straightforward management." Mayo also introduced the idea that attention to the well-being of workers – a humanistic approach – could have a major impact. The Hawthorne effect, summarized in that “the mere act of showing people that you’re concerned about them usually spurs them to better job performance”, changed the way of thinking that productivity was controlled solely by working conditions and pay (Elliott, 1934).
The focus of organizational studies shifted to the analysis of how human factors and psychology affected organizations. This Human Relations Movement focused on teams, motivation, emotional needs, job satisfaction and individuals within organizations, it represented a shift in the study of management from a scientific to a multi-disciplinary approach.

Elton Mayo, in the same book above cited, also stated that “problems of human equilibrium and effort are not completely contained within the area controlled by factory organization and executive policy. Certain of the sources of personal equilibrium and especially the low resistance to adverse happenings in the ordinary and consequent anomic which is in these days typical of living conditions in or near any great industrial centre” (Mayo, 1933, page 165).

Furthermore, Mayo’s studies suggested that consultation between labour and management gave workers a sense of belonging to a team and encouraged innovation through the participative support at the lower levels of the organization in solving organization problems (Sonnenfeld, 1985). Many critics have re-examined the studies from methodological and ideological perspectives; but they still remain groundbreaking concepts.

3.3.2. RELATING WORK TO OTHER ASPECTS OF LIFE (1960S / 1970S)

As previous studies revealed that work conditions and workplace were as important as a multitude of other factors, including living conditions, when considering people at work, soon dilemmas relating the management of paid work to other parts of life, especially family, became themselves areas of research.

3.3.2.1. WOMEN’S CAREERS AND THE INTERFACE BETWEEN WORK AND FAMILY

With the increasing number of professional women entering the workforce, organizations evolved towards a work-family life interface perspective focusing on working mothers, the need for quality childcare (e.g. Rapoport and Rapoport, 1966) or dual earner families (e.g. Rapoport and Rapoport, 1969, 1971).
Dual earner families, though a tiny social minority in 1960s U.S., already represented an emerging trend, eliciting structural and value changes on social patterns that urged to be studied. Dual earner families are families where both husband and wife pursue careers, meaning they both have jobs highly salient personally and that require a high degree of commitment. Theses families wee likely to emphasize new values not only in workplace, like self-expression, personal development and rewarding interpersonal relationships, but also promoting partnership in family life, through equality between spouses, joint activities and collaboration in decision-making (Rapoport and Rapoport, 1969).

3.3.2.2. WORK-FAMILY ROLE SYSTEM

Psychologists, like Joe Pleck, took a different approach redirecting research to work-family role system (Pleck, 1977). He conceptually analyzed the male work role, the female work role, the female family role and the male family role as components of the work-family role system as well as the linkages among them. He, also, analyzed two kinds of structural "buffers" in those links, specifically, sex-segregated labour markets for both paid work and family tasks. He concluded that future development of a less sex-segregated work-family role system ought to be considered.

He developed the notion of asymmetrically permeable boundaries between the life domains of work and family, in the sense that they mutually influence each other but the influence of work into family life was greater than in reverse direction (Pleck, 1977).

Furthermore, studies conducted during this period, concluded that occupying multiple roles, both at work and in family life seemed to be associated with role strain, work stress and lower marital satisfaction of spouse (Pleck, 1985).

3.3.2.3. THE MYTH OF SEPARATE WORLDS (1977)

For many, one of the most influential, pioneer and seminal work in the field of work-family life integration was Rosabeth Moss Kanter’s Work and Family in the United States: A Critical Review and Agenda for Research and Policy (Kanter, 1977) that illuminated the “myth of separate worlds” that was prevalent in the thinking on work and family.
“The myth goes like this: in an industrial society, work life and family life constitute two separate and non-overlapping worlds, with their own functions, territories and behavioural rules. Each operates by its own laws and can be studied independently. If events or decisions in one world (such as wages awarded to worker) enter the other, they enter in the guise of external (and hence often extraneous) variables but are not intrinsic part of the operation of that world. They help shape a context but little more” (Kanter, 1977, page 78).

Kanter suggests that not only there is a spillover relationship between both work and family grounds but that both worlds and the interrelationship between them is essential, constituent, intrinsic to personal life and this should be the standing point for more integrative research directions starting either from work or family.

In fact, time, tasks, attitudes, stress, emotions and behaviour spill over between the interfaces. Emotional climate at work affect families and so can a family’s emotional climate and demands affect members as workers. Family situations can define work orientations, motivations, abilities or emotional energy as, for example, the willingness to take risks or to travel previously and after a child is born.

Concluding, and alongside other authors (e.g. Bailyn, 1976, Bailyn and Scheln, 1976), she argues that individual aspirations, work demands and family concerns across time are equally determinants of one’s professional trajectory and should be taken into account by organizations when addressing human resources management issues like, for instance, career developing.

Figure 4 – Integration of work and family arenas with personal life

A note of great impact was that, by expressing the subject in this way, she catapulted it and it became an issue, relevant for everyone both men and women.
3.3.3. WORK-FAMILY CONFLICT (1980S)

3.3.3.1. EXPLORING THE WORK-FAMILY INTERFACE

By the 1980s, an explosion of theorizing the consequences, factors and variables affecting work-family life interface occurred, with an emphasis in quantitative research.

Despite the fact that work-family interface is a dynamic and complex problem evolving over time, most of the studies have been following a quantitative, cross-sectional methodological approach. Some rare exceptions will be the longitudinal studies looking at the development and results of work-family conflict. Most of these longitudinal studies were presented years later (e.g. Frone et al., 1997a, Mauno, 2010, Repetti, 1989, Williams and Alliger, 1994).

Also most of the studies in this area, during this decade, do not take into account the direction in which the interface is analyzed considering it equally symmetrical. As mentioned earlier, the boundaries between work and family are asymmetrically permeable and of different nature. Influence of work on family is different from the influence of family on work (Frone et al., 1992b) and so its sources, antecedents and consequences should also be differentiated.

Identifying the sources and background circumstances related to work-family life conflict, as well as its consequences, can help organizations to understand the subtleties of work-family life interface and prevent some of its negative impact while potentiating its positive influence.

Some influence reviews worth to be cited. Near et al. (1980) conducted an early narrative review of empirical studies examining how work relates to non-work, providing a roadmap for developing theoretically grounded work family research.

A few years later Greenhaus and Beutell (1985) wrote an influential review outlining the major sources of conflict between work and family roles, including time-based conflict (i.e., incompatible time demands between work and family), strain-based conflict (e.g., affective spillover from one domain to the other), and behaviour-based conflict (e.g., where in-role behaviour in one domain is incompatible with role behaviour in the other domain) as three distinct forms of work–family conflict and proposing distinct predictors of each.
CHAPTER 3

Voydanoff (1988) proposed an expanded conceptualization of work and family to include non-paid work and other family structures such as single parents.

3.3.3.2. CORPORATE INVOLVEMENT

While attentively following research in this area, during the 1980’s a growth of greater corporate involvement in these issues could also be realized. As an extension to employee assistance programmes introduced in many companies in the 1970s, a large number of work-family life balance related initiatives were set-up.

This evolution was due not only to the existence of variables influencing personal performance and highlighted by academic research as described, but also to the existence of a set of business catalysts that push the family-friendly firms´ movement forward.

An interesting study, conducted by the Boston College Center for Work & Family, through interviews with thought leaders identifies some possible catalysts (Harrington, 2007), including:

- the increase of women in professional roles,
  Most initiatives aimed to fill the gap between the conventional way the world of work was structured and the reality of how people, namely working mothers, were actually living their lives. In some cases, there was no possible fit and people left, with great cost to themselves and to the firm.

- media attention,
  Many firms, because of the consistent implementation of family-friendly policies, hit the front page of relevant business journals, like the Wall Street Journal.

- attempts to cultivate corporate image and reputation,
  Society, in general, was demanding that organizations adopted family-friendly policies and took initiatives and the mere fact of their existence greatly influenced corporate reputation. Employee surveys and reports on these practices were released to shareholders and to the media, serving to spread the corporate image.

A study (Arthur and Cook, 2004) examining share price reactions to 231 work-family human resource policies adopted by Fortune 500 companies and
announced in the Wall Street Journal between 1971 and 1996, suggests that firm announcements of work-family initiatives positively affected shareholder return.

• feedback / demands from employees
  Employees gave the company the information to develop programmes and policies that help managers and the business understand what was happening, what was changing, how they were doing. It was possible to measure and show that employees who have better work-life balance tend to be much more committed.

• the emergence of professional groups and consortia
  The work-family life initiatives became global, at least in western countries, and those firms, the early adopters, considered themselves as a collaboration group, a club, and not competitors, addressing the challenge of being creative and implementing such policies.

3.3.4. HARMONIZING WORK AND FAMILY LIFE (1990S)

Following the tendency of previous decades, several researches, both quantitative and qualitative, of the work–family literature have been carried out, thoroughly reviewing relationships between specific work and family variables (Eby et al., 2005).

In what concerns quantitative studies, much of the literature was still focusing around work–family conflict, as it was defined by Greenhaus and Beutell: “a form of inter-role conflict in which the role pressures from work and family domains are mutually incompatible in some respect” (Greenhaus and Beutell, 1985, page 77). And, as time goes by, there is already sufficient literature on this theme to produce some essential meta-analysis reviews (e.g. Kossek and Ozeki, 1998, Kossek and Ozeki, 1999, Allen et al., 2000).

Kossek and Ozeki (1998), on their meta-analysis review, found a consistent negative relationship between all forms of work–family conflict and both life and job satisfaction and, later on (Kossek and Ozeki, 1999), they examined work–family conflict and work outcomes, including performance, turnover intentions, absenteeism, organizational/work commitment, job/work involvement and burnout. Allen et al. (2000) found work-to-family conflict to be associated with various work-related (e.g., job satisfaction), family-related (e.g., life satisfaction), and stress-related (e.g., burnout) outcomes.
A new tendency could also be acknowledged. While recognizing that work and family life are both important and fulfilling, scholars didn’t pursue as exhaustively as during the previous decade, the study of the negative impacts, their antecedents and sources but sought after the creation of conditions for the harmonization of both and their positive impacts. For instance, Baltes et al. (1999) reported that the effects of flexible and compressed work schedules on a variety of work outcomes related positively to productivity, job satisfaction, and work schedule satisfaction, and related negatively to absenteeism.

Other scholars (e.g. Dalton and Mesch, 1990, Duxbury et al., 1992, Solomon, 1994, Grover and Crooker, 1995, Pitt-Catsouphe and Bankert, 1998, Kossek and Ozeki, 1998, Hewlett and Luce, 2005, Chinchilla and Torres, 2006) concluded that, in general, the consequences of facilitating the harmonization of both work and family, thanks to the existence of policies and initiatives, as having:

- increased workforce motivation, job satisfaction and affective commitment
- reduced staff turnover and absenteeism, increased return rate following parental leave
- improved recruitment
- increased productivity, loyalty and morale

Despite the enlightenment of such fruitful research decades, some shadows could be found and deserved being analyzed. Thus, in turn, some studies (e.g. Budd and Mumford, 2006, Goodstein, 1994a, Ingram and Simons, 1995) demonstrated that

- statistics on workplace availability of work-family life initiatives drastically overstate the extent to which employees perceive that work-family are accessible to them personally,
- and this misalignment between the perception employees have about the policies being beneficial and the knowledge about these policies is counterproductive, undermines the consequences and corrupts credibility and trust within the organization.

Collectively, these reviews have contributed greatly to our understanding of specific relationships between work and family domain variables and suggested important
directions for future research. These reviews, while focusing on specific aspects of the work–family interface, paved the way for work-family research as a whole and some other organizational and individual dimensions not explored yet.

3.3.5. **PERMEABILITY OF THE WORK-FAMILY BOUNDARY (2000S)**

Research on work-family balance has grown and broadened significantly with contributions that shed new light on the question of how can organizations engender the highest levels of employee and organizational performance while simultaneously enabling employees to achieve a good balance between their work and family lives? (Brough and Kalliath, 2009) Such a research was stimulated by an increased diversity of workplaces and of families, by methodological innovations and by the growth of communities of scholars focused on the work-family nexus (Bianchi and Milkie, 2010).

Workplace environment trends, (e.g. Zedeck and Mosier, 1990, Lewis et al., 2007), organizational policies (e.g. Brough and O'Driscoll, 2010) and culture sensitive approaches (e.g. Lewis et al., 2007, Powell et al., 2009) were recognized to influence in helping workers balance work and family. Also different strategies for promoting work–family balance at the individual and organizational (e.g. Frone, 2003) level have been discussed in the literature but, essentially, recent research has focused on the influence of organizational work-family context on employee outcomes (e.g. Yang, 1993, Thomas and Ganster, 1995, Thompson et al., 1999, Allen, 2001, Major et al., 2008, O'Neill et al., 2009, Mauno, 2010).

Moreover, this construct has sometimes been investigated in concert with the general organizational context (e.g. Behson, 2002b). Results indicate that work-family context is important in explaining variance in work-family specific outcomes such as work-to-family conflict. However, work-family context fails to explain unique variances in job satisfaction and affective commitment when studied alongside broader indicants of general organization context (e.g. perceived organizational support, perceived fair interpersonal treatment, and trust).

An important advancement was also to study the important mediator role of global employee perceptions regarding the extent their work organization is family-supportive in determining employee reactions to family-friendly benefit policies (e.g. Allen, 2001).
An emerging paradigm is being considered stating that employee work behaviour cannot be fully understood or explained by organizational behaviour variables within the workplace alone. Recent advances in technology have for example resulted in an almost seamless interface between work and family (Brough and O'Driscoll, 2010). In fact, the increased permeability of the work-family boundary due to longer working hours, greater use of work-at-home practices such as telework, and increased use of technologies that link employees to the workplace around the clock (e.g., email, PDAs) presents new challenges in efforts to balance work and family needs (Major et al., 2008). But also the growing diversity of family structures presented in the workforce—including dual-earner couples, single parents, blended families, and employees with responsibility for elder care—has heightened the relevance of balancing work and family roles for a substantial segment of employed men and women (e.g. Parasuraman and Greenhaus, 1997, Googins, 1997).

All these developments have greatly increased the complexities of the interface between work and family. Parasuraman and Greenhaus (2002) observed that although the literature provides abundant evidence that work and family are interconnected in many ways, the links between the two arenas are more complex than was envisaged initially. According to these same scholars (Parasuraman and Greenhaus, 2002) changes in the nature of jobs and organizations, as well as social changes in family structure, have rendered much of the research-based knowledge of the interdependence of work and family outdated.

3.3.6. ROSABETH MOSS KANTER – A RECURRENT LANDMARK

3.3.6.1. INTRODUCTION

The years reviewed in this chapter surely were a time of dramatic changes from an industrial and manufacturing economy to an information and services one.

3.3.6.2. MEN & WOMEN OF THE CORPORATION (1977)

In 1977, Rosabeth Moss Kanter published a book with a tremendous impact on academic research as well as on management practices and policy making: Men and Women of the Corporation (Kanter, 1993). This was another seminal work of hers as it is one of the first studies to focus on organizational culture and empowerment. She explored how the
organizational structure and culture shaped behaviour of its workers and how they affect productivity and people's contributions in the workplace.

She sought to learn how organizations could create cultures to empower people and make them more productive and innovative in products as well as in methods.

She concluded that

- The job makes the person; meaning that attitudes and behaviour are shaped by the opportunities that companies offer, the power people have to mobilize resources and the proportional distribution of different kinds of people in various positions.

- Furthermore, productivity, motivation and career success are determined by organizational structure and the nature of social circumstances in which people find themselves.

- People with few or low opportunity situations, respond with poor attitudes: Lower aspirations and performance, less commitment and excessive bureaucracy (controlling, rules-minded, territorial).

Concerning work-family life thought, these conclusions are highly relevant as they state the importance of the renewal of organizational structure - through, for instance, promoting the presence of women at all levels of the organization - and of the cultural change and empowerment of employees. Years later, these factors will be recognized (e.g. Chinchilla and Torres, 2006) as facilitators of work-family life policies implementation and their gratifying use by employees and their families.

3.3.6.3. REVISITING MEN & WOMEN OF THE CORPORATION (1993)

Almost 10 years after the publication of Men & Women of the Corporation, Rosabeth Moss Kanter writes an afterword on the same book (Kanter, 1993), calling it “the View form the 1990s: How the global economy is reshaping corporate power and careers”, concluding that the pointed structural factors (opportunity, power and number) still influence performance and success though their nature has shifted and the access to them has been reshaped.

According to her, organizations have shifted:
• from fat to lean: new staffing principles
• from vertical to horizontal: new organizational structures
• from homogeneity to diversity: new work force
• from status and command to expertise and relationships: new power source
• from company to project: new loyalty
• from organizational capital to reputational capital: new career asset

These changes mean that corporations have responded to productivity and quality problems with mobility channels and empowerment of workforce; HR management practices have became standard practices and women managers are not longer tokens but members of a minority (which allows some collective actions) and less alone outside the corporation (networking).

The paradox however is that, the same changes that allowed women to enter massive and totally into labour force, did not give them more time to dedicate to the family, to the children or to their education.

In fact, new work dynamics based on empowerment, participation and entrepreneurship take more time and energy and, thus, present new problems for both men and women juggling work and family commitments.

The conclusion is that “as new barriers are knocked down, new ones appear”.

3.3.6.4. ON THE FRONTIERS OF MANAGEMENT (1997)

Later on, on her book “On the Frontiers of Management” (Kanter, 1997), Rosabeth Moss Kanter will reinforce the idea that “the destination has not been reached just because the map has been drawn”. A changing context, as the one we are living in, still requires a revaluation of human capital from the organization and, individually, people to gain the skills and self-reliance to find security and support in that uncertain context.

From a global perspective, she refocuses the aim stating that “a smaller world creates a bigger agenda for business. There are more cultures to understand, more social responsibilities to master, more time pressures to juggle and more relationships to rethink.” And that “while cleaning the environment is also an important arena... a greater
challenge for business is to identify a social agenda that identifies ways to contribute to today's families and tomorrow's workforce.”

Concluding, tremendous progress has been made in implementing innovative work-life policies and programmes over the past 20 years. However, there is still a significant challenge to institutionalize this new way of working and managing the workforce (Kanter, 1993).

The critical areas of focus in making the transition to a cultural change perspective are influencing senior leaders and middle management and helping employees make and negotiate effective and personalized professional trajectories.

Ultimately, credibility, consistency and potential benefits coming from these policies will only be achieved through an integrated approach based on a social responsibility paradigm.

The same concern is expressed in a recent book called “Myth of Work–Life Balance: The Challenge of Our Time for Men, Women and Societies” (Gambles et al., 2006): “if there is neither time nor energy for care and connectedness between people, do we have a problem of human sustainability?”

3.4. WORK-FAMILY INTERFACE

3.4.1. INTRODUCTION

When considering the different actors at the work-family interface, conflict situations have normally negative consequences for the individual, the family and the firm. This is the basic reason for the fact that work family literature has thoroughly studied work family conflict construct, either as unidimensional one or considering work-to-family and family-to-work conflict as distinct facets of the more general construct. Another reason, though not so important, is that, as a social phenomenon, it is never completely studied and it changes overtime (Eby et al., 2005).

On a research aiming to highlight relationships at the work-family life interface, it is important to review work-family conflict construct, namely its sources, antecedents and outcomes but also to go beyond it and explore the emerging concept of work-family enrichment.
3.4.2. WORK-FAMILY CONFLICT

3.4.2.1. SOURCES

Sources of work-family life conflict can be generally divided in three types (Yang et al., 2000):

- Competition for scarce time (e.g. extra-hours, working at home, arriving late at work and skipping family activities).

  A study (Carlson and Perrew, 1999) shows the relationship between time demands, role stressors and the increase of work-family conflict. It also concludes that the existence of social support can effectively decrease the impact of the previous factors.

- Work and Family demand (e.g. daily involvement in tasks, activities and decisions, job and family stressors).

  Though not all stressors affect equally the other reality (Doby and Caplan, 1995), several studies demonstrated that job and family stressors are related to less satisfying family relations, decrease of involvement with family members and increased signs of anger and aggression in the family (Repetti, 1987, Repetti, 1989, Barling and Rosenbaum, 1986, Burke, 1982, Jackson and Maslach, Piotrkowski and Crits-Christoph, 1982).

  Daily involvement in family roles (Williams and Alliger, 1994) as well as job involvement (Adams et al., 1996, Greenhaus and Beutell, 1985, Higgins et al., 1992) are also related with work-family conflict though its impact is not symmetrical (Frone et al., 1992b).

- Conflicting behaviours, normally related to multiple life roles accomplishment (e.g. role ambiguity, and role conflict).

Antecedents of conflict at work-family interface are:

- **Individual characteristics**
  Generally speaking, gender and educational level matters (e.g. Scandura and Lankau, 1997, Duxbury and Higgins, 1991) and those with preoccupied affective and attachment styles, self-monitors or having a neurotic personality tend to report greater negative spillover and less segmentation from home-to-work and vice-versa (Eby et al., 2005). At the cultural level, cross-national researches have been carried out (e.g. Spector et al., 2004) and, for instance, Yang et al. (2000) found that American employees reported greater family demands than Chinese employees, and family demands had a greater effect on work family conflict among Americans whereas work demands had a greater effect on work family conflict among Chinese workers.

- **Socio-demographic familiar characteristics**
  Examining characteristics of the family domain as predictors of work family conflict (e.g. Eagle et al., 1998, Kinnunen and Mauno, 1998), these studies have found that conflict is higher among those who have children at home (e.g. Behson, 2002b, Carlson, 1999, Grzywacz and Marks, 2000), are concerned or troubled about child care (Buffardi and Erdwins, 1997, Fox and Dwyer, 1999), have disagreements, tension or stress with their family or spouse (Carlson and Perrew, 1999, Fox and Dwyer, 1999, Grzywacz and Marks, 2000, Williams and Alliger, 1994), are highly involved with the family (Carlson and Perrew, 1999, Parasuraman and Simmers, 2001), have greater time demands from family (Carlson and Perrew, 1999, Parasuraman and Simmers, 2001, Sanik, 1993, Yang et al., 2000) and, in general, have a working spouse (Barnett and Brennan, 1997).

- **Social support (spouse, family and the supervisor)**
  Several authors found that social support from the supervisor (Goff et al., 1990, Thomas and Ganster, 1995), the spouse (Bedeian et al., 1988) or the family in general (Carlson and Perrew, 1999, Grzywacz and Marks, 2000) is of great importance in reducing work-family conflict and role stressors, serving sometimes as mediator from both sides of the interface (Burley, 1995).
• Work characteristics

Not intending to be exhaustive, a list of examples of studies related to work characteristics that have been found to be linked to a higher work family conflict is:

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Examples of studies</th>
</tr>
</thead>
<tbody>
<tr>
<td>unpredictability in work routine</td>
<td>(Fox and Dwyer, 1999)</td>
</tr>
<tr>
<td>working weekends or rotating shifts</td>
<td>(Shamir, 1983)</td>
</tr>
<tr>
<td>troubled by a sense of inequity in rewards at work</td>
<td>(Greenhaus et al., 1987)</td>
</tr>
<tr>
<td>experience abusive supervision</td>
<td>(Greenhaus et al., 1987)</td>
</tr>
<tr>
<td>have a profit-driven focus</td>
<td>(Wallace, 1997)</td>
</tr>
<tr>
<td>being self-employed or having greater autonomy at work</td>
<td>(Parasuraman and Simmers, 2001)</td>
</tr>
<tr>
<td>work a greater number of hours or longer days</td>
<td>(Carlson and Perrew, 1999, Grzywacz and Marks, 2000, Greenhaus et al., 1987, Shamir, 1983, Nielson et al., 2001)</td>
</tr>
<tr>
<td>report high job involvement</td>
<td>(Parasuraman and Simmers, 2001, Carlson and Perrew, 1999)</td>
</tr>
<tr>
<td>display greater time commitment to work or are high in intrinsic motivation and organizational loyalty</td>
<td>(Parasuraman and Simmers, 2001)</td>
</tr>
</tbody>
</table>

Table 4 – Work characteristics antecedents of an higher WFC

On the other hand, the following work characteristics have been found to be related to a reduction of work family conflict:

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Examples of studies</th>
</tr>
</thead>
<tbody>
<tr>
<td>availability of work–family benefits</td>
<td>(Thompson et al., 1999)</td>
</tr>
<tr>
<td>receiving more role modeling and overall mentor support and having a mentor who is perceived as having similar work–family values</td>
<td>(Nielson et al., 2001)</td>
</tr>
<tr>
<td>work support, in general</td>
<td>(Carlson and Perrew, 1999, Greenhaus et al., 1987, Thompson et al., 1999)</td>
</tr>
<tr>
<td>having a strong sense of community at work and a greater perceived control at work.</td>
<td>(Clark, 2002)</td>
</tr>
<tr>
<td>family sensitive supervision and work flexibility</td>
<td>(Clark, 2002)</td>
</tr>
<tr>
<td>perceiving social value to one’s work and having access to promotional opportunities</td>
<td>(Wallace, 1997)</td>
</tr>
</tbody>
</table>

Table 5 – Work characteristics antecedents of a lower WFC

3.4.2.3. OUTCOMES

The negative effects of work-family conflict for the individual have been extensively documented and examples of them are:
CHAPTER 3

- greater physical and psychological health risks,

Studies by Frone et al. (1997a) and Greenglass et al. (1988) suggest that work family conflict provokes physical health complaints and hypertension as well as greater psychological distress, anxiety, emotional exhaustion, depression mood disorders, and substance abuse disorders. Other studies focus on the link with greater stress (Kelly and Voydanoff, 1985, Parasuraman and Simmers, 2001)

- lower performance and involvement in job and family activities,

An interesting study, carried out among salespersons, concludes that work-family conflict is related with emotional exhaustion and job dissatisfaction and that most of these consequences are also related with the propensity to leave one’s job (Boles et al., 1997b). Other studies exploring these outcomes are, for e.g., (Small and Riley, 1990, Pleck, 1985)

- reduced marital satisfaction, job satisfaction and overall life satisfaction.

Good examples of studies demonstrating a lower life satisfaction on the individual are, for e.g. (Bedeian et al., 1988, Greenhaus and Parasuraman, 1994).

A second type of consequences of work-family life conflict can be grouped under consequences for the family. In fact, though indirectly, the following consequences are a demonstration of a clear impact on the family:

- fatigue, tension, irritation and absentmindedness in family activities,

Work stressors such as long hours cause strain, which causes many problems physical and mentally, in the individual, and, consequently, he will perform less well in a spouse or parent-role (Atkinson et al., 1986, Dew et al., 1987)

- less time spent together by the couple, lower marital and family satisfaction,

According to two studies, the time that couples spend together is determined by the hours they work and marital satisfaction is related with it (Kingston and Nock, 1987), while dissatisfaction is mainly related with work conflict (Greenglass et al., 1988) and stressors at home (Jones and Fletcher, 1986). Some studies also suggest that work family conflict is related to lower family satisfaction (Bedeian et al., 1988).
weaker overall school performance of children, higher parent-adolescent conflict

A detailed study (Goldberg et al., 1996a) conclude on the influence of working hours and work involvement of the mother on the development, social and school performance of the child: a higher work motivation on the mother was linked to higher achievement in school. Also the effects of work pressure on adolescent well-being seems to be mediated by parental role overload and parent-adolescent conflict (Crouter et al., 1999).

Consequences are not limited to individuals and their families but they affect also the companies, as for example:

- job dissatisfaction and decreased motivation,
- lower performance and commitment,
- higher turnover and less career satisfaction


In fact, work-family conflict can be seen as a moderator itself. For instance, a study (Barling and Macewen, 1992) demonstrates that role ambiguity, role conflict, job insecurity and job dissatisfaction are related, indirectly, with marital functioning, as they turn out to cause personal strain in the individual.

Work-family conflict has also been found to mediate the relationships between work expectations, work conflict, job involvement, and family involvement with both quality of work and quality of family life (Higgins et al., 1992). Specifically, workers who reported higher work expectations, greater work conflict, and higher involvement in both job and family domains had higher work-family conflict. This, in turn, predicted reduced levels of both quality of work life and quality of family life.
Further, Thomas and Ganster (1995) found that supervisor support reduced work-family conflict among health care workers, which in turn led to greater job satisfaction, less depression, fewer somatic complaints and lower cholesterol levels.

### 3.4.3. WORK-FAMILY ENRICHMENT: BEYOND WORK-FAMILY CONFLICT

From the dominant assumption in the work-family literature that both spheres of life are separate and compete for such scarce resources as time and attention to the recurrent focus on conflict after Greenhaus and Beutell paper (1985), growing evidence of work-family synergy (e.g. Bailyn, 1993) and salutary effects of multiple-role involvement (e.g. Barnett and Hyde, 2001, Marks and MacDermid, 1996) has being confirmed, paving the way to the concept of work-family enrichment.

Work-family enrichment is also a bidirectional construct defined as “the extent to which experiences in one role improve the quality of life in the other role” (Greenhaus and Powell, 2006, page 73) or, in the same line but defined by Carlson et al., (2006) as occurring when resources and experiences gained from one role improve role performance and quality of life in the other role. This construct focus mainly in the positive aspects of work-family interface like those listed in Table 5 and on the positive spillover in terms of involvement (development, affective commitment and personal fulfillment) in both directions (for instance: “my involvement in my work helps me to understand different viewpoints and this helps me to be a better family member” (Carlson et al., 2006)).

Compared to work-family conflict, work-family enrichment receives comparatively little attention and remains conceptually and empirically under developed (e.g. Frone, 2003, Witt and Carlson, 2006).

Yet, so far, several scholars have already noted that work-family conflict and enrichment are not necessarily parallel concepts (Frone, 2003, Witt and Carlson, 2006). Others researchers are now incorporating positive aspects of the work-family interface into their models, and a few have gone further, specifying how the positive and negative aspects of the interface might combine to produce outcomes (Gareis et al., 2009). For example, Greenhaus and Powell (2006) speculated that beyond having main effects, enrichment could buffer people from the negative consequences of work-family conflict. Also as
Grzywacz and Bass (2003) noted that if we conceive family-to-work enrichment as a family’s adaptive response to a member’s work demands, it may be the key to defusing work-family conflict.

3.4.4. CONCLUSION

Surely, the integration of both constructs - conflict and enrichment – will promote a fuller picture of the work-family interface (Gareis et al., 2009). These positive aspects related to the existence of family-supportive initiatives in the organization and, especially, the existence of a family-supportive organizational climate and culture will be analyzed in the next paragraph.

3.5. CORPORATE CULTURE AND ORGANIZATIONAL CLIMATE

3.5.1. INTRODUCTION

Several studies (e.g. Brough et al., 2005) prove that organizational interventions, such as the implementation of family-friendly policies, are necessary but not enough to reduce the adverse consequences of work–family conflict or to potentiate the achievement of the advantages stated above.

Actually, although the provision of family-friendly benefits can help employees manage multiple work and non-work responsibilities, the availability of these benefits alone does not address fundamental aspects of the organization that can inhibit employees from successfully balancing career and family (Allen, 2001). For example, family-friendly programmes often do not affect organizational norms and values that dissuade employees from using benefits such as lack of informal support from supervisors (e.g. Burke, 1999, Shellenbarger, 1992). Likewise, individuals who take advantage of these options, and thus visibly demonstrate interest in family and personal life, may face negative judgments regarding their lack of commitment to the organization (e.g. Allen and Russel, 1999, Fletcher and Bailyn, 1996). Lobel and Kossek (1996) state that offering family-friendly benefits does not go far enough to address employee concerns unless these benefit offerings are also accompanied by a change in organizational norms and values regarding the appropriate interaction between work and family life. Similarly, Galinsky and Stein
(1990) state that the environment of the company is crucial to the success of policy implementation.

Despite the efforts of organizations to attain a competitive advantage and aid employees by offering family-friendly benefits, employees frequently do not believe that the organization’s environment changes to facilitate these efforts. Often employees perceive that the organization encourages workers to devote themselves to their work at the expense of other life domains (Lobel and Kossek, 1996). This is a critical point, as the implementation of family-friendly benefits may not have the effect intended if employees do not perceive the environment of the organization as hospitable to their efforts to seek balance between their work and non-work lives (Allen, 2001). This organizational environment is often referred as Family-Supportive Work Environment (Thomas and Ganster, 1995, Allen, 2001), built upon concepts such as Family-Supportive culture (Thompson et al., 1999). Family-supportive culture is defined as the shared assumptions, beliefs, and values regarding the extent to which an organization is perceived by its personnel to support and value reconciliation between work and family life (Thompson et al., 1999). Such concepts are drawn as instantiations of global concepts that reflect the way things are done, or perceived by the employees as expected to be done, in the organization. These global concepts have been studied in the corporate culture and organizational climate literatures.

Corporate culture and organizational climate are widely used terms that receive considerable attention in both the business and academic literature. The concepts have been studied for decades and it is generally accepted that they are important to understand the organizational functioning and to explain certain phenomena like how organizations influence the behaviour, attitudes, and well-being of their members, why some organizations are more innovative and quicker to adopt new practices and technologies and why some organizations are more successful than others (Glisson and James, 2002). In the case of family-friendly policies, corporate culture and organizational climate can be an explanation of whether employees perceive that such policies are accessible and non-penalizing to them personally (e.g. Budd and Mumford, 2005).
3.5.2. CULTURE AND CLIMATE AS ORGANIZATIONAL CONCEPTS

The business literature on organizational culture and climate has a relatively short history though it generated a widespread interest. Much of the enthusiasm about the value of culture and climate was originated with *In Search of Excellence* by Peters and Waterman (1982). By conducting case studies of some of America's most successful businesses, Peters and Waterman inspired a business's world passionate movement with culture being the key to organizational success. It even quickly spread to the public and non-profit sectors. In fact, a decade later, in *Reinventing Government* (1992) Osborne and Gaebler extended the work of Peters and Waterman to the American public sector by describing the importance of culture to the performance of government agencies. Based in this work, Schorr explains, in *Common Purpose* (1997), the roles that organizational culture and climate can play in revitalizing the social and welfare public systems. Later, the extension to non-profit sector was also considered.

In the academic literature, organizational culture and climate were addressed for a much longer period than in the business literature. For example, the term organizational climate was used as far back as the 1950s (e.g. Argyris, 1958, Fleishman, 1953). This predated the first use of the term 'organizational culture' in the academic literature by two decades (Handy, 1976, Pettigrew, 1979). Nevertheless, the concept of organizational culture, though not called by this specific term, can be traced back into case studies published concurrently with the first climate literature (e.g. Gouldner, 1954).

However, the literatures on culture and climate developed independently and almost no empirical research examined both constructs in the same study.

In the academic literature, the study of organizational climate used to be based in psychological, quantitative, nomothetic approaches while research on culture relied more on anthropological, qualitative and idiographic methods. These different approaches tended to broaden rather than narrow existing gaps in our common knowledge of culture and climate (Schneider, 2000).

Schneider, in *Organizational Climate and Culture* (Schneider, 1990) edited one of the first texts that merge culture and climate concepts. This research was stimulated by epistemological and methodological debates over the differences and similarities between the two constructs. The debates were rooted in a conflict between the psychological
origins of the climate construct versus the anthropological origins of the culture one; the quantitative methods used to study climate versus the qualitative methods used to study culture; the applied orientation of climate research versus the theoretical orientation of culture research; and the nomothetic designs that dominated climate studies versus the ideographic designs that were used in most culture studies (e.g. Denison, 1996, Pettigrew, 1990b, Reichers and Schneider, 1990). These and other issues that divided research on the two constructs explain why limited progress was made in understanding the similarities and differences between culture and climate in the decade following Schneider’s edited text (Schneider, 2000).

A content analysis by Verbeke et al (1998) of the published organizational literature on culture and climate identified, until then, 32 different definitions of organizational climate and 54 definitions of organizational culture. The number and nature of the definitions uncovered by the content analysis reinforced the idea of confusion about the distinction between culture and climate and the broad range of organizational phenomena included under those labels. However, that content analysis also revealed two core concepts in the literature that highlight the distinctiveness between culture and climate. The empirically derived core concepts from the literature described ‘climate’ as the way people perceive their work environment and ‘culture’ as the way things are done in an organizational unit (Verbeke et al., 1998). Although these core concepts are not fully developed definitions, they make an important distinction. By describing climate as the way people perceive their work environment and culture as the way things are done in an organizational unit, climate is defined as a property of the individual and culture is defined as a property of the organization (James et al., 1990).

Within the last decade, the indiscriminate use of the terms, climate and culture, became increasingly widespread in the academic literature and theoretical discussions of the two constructs increased. As mentioned, it is only since then that culture and climate have been discussed simultaneously in the organizational literature (Schneider, 1990). Some authors continue to use the two terms interchangeably (e.g. Schneider, 2000), some argue that culture and climate overlap or that one encompasses the other (e.g. Denison, 1996), others argue that perhaps the perspective is different but the phenomenon is the same (e.g. Pettigrew, 1990b) and others argue that they are distinct (Schein, 2000).
3.5.3. DEFINITIONS OF ORGANIZATIONAL CLIMATE

The first writings on climate began in the late 1930s, but the bulk of the research began in the 1960s, exploring the relationship between organizational climate and work productivity and motivation. Organizational climate originally was used to refer to social, organizational, and situational influences on behaviour (Glick, 1985). According to Tagiuri (Tagiuri and Litwin, 1968), organizational climate represents lasting features of the internal environment of an organization and the values that members give to this set of characteristics or attributes. Organizational climate describes the practices and procedures of an entire organization or subunit and influences the attitudes and behaviour of the participants. Climate arises from and is sustained by these organizational practices and is influenced by structural and contextual factors.

Some definitions of climate include the distinction between psychological and organizational climate developed by Lawrence James and colleagues (e.g. James and Jones, 1974, James et al., 1990). Psychological climate is defined as the individual employee’s perception of the psychological impact of the work environment on his or her own well-being (James and James, 1989). When employees in a particular work unit agree on their perceptions of the impact of their work environment, their shared perceptions can be aggregated to describe their organizational climate (Jones and James, 1979, Joyce and Slocum, 1984).

These inspire the two distinct approaches to the study of organizational climates:

1. The individual unit of analysis, measuring the group member's perception, interpretation, personal meaning and valuation of the organization's attributes (James and Jones, 1974).

2. The organizational unit of analysis, using the employees' collective perceptions and interpretations of the organization's attributes (Joyce and Slocum, 1984).

The accepted method of determining organizational climate, by aggregating individual perceptions and using the mean to represent climate, has been variously attacked and defended (e.g. James and Jones, 1974, Glick, 1988, James et al., 1988). The essence of the debate seems to be whether it makes sense to aggregate individuals' perceptual
variables to a situational level of analysis. The main argument in favour being that climate perceptions tend to be shared.

When defined as an organizational attribute, climate often is described as the work environment or the personality or the DNA of the organization as it encompasses and influences employee attitudes, beliefs, and behaviour. When climate is viewed as an individual attribute, individual perceptions are the reference for behaviour: "People are the setting because it is they who make the setting." (Schneider, 1980, page 440).

Nevertheless, one important conclusion is that climate remains a property of the individuals regardless of the individual or organizational stance where one stands in the individual’s perceptions. If the individual perceptions are shared among individuals within a work unit, they can be aggregated to characterize the work unit (and labelled organizational climate), but the perceptions remain a property of the individuals in the unit (James, 1982).

Another conclusion is that, although the psychological impact of the work environment is normally measured as multiple dimensions (e.g., emotional exhaustion, depersonalization, role conflict), a single, higher-order, general psychological climate factor is believed to lie behind climate. This general factor represents the individual’s perception of the overall psychological impact of the work environment on the individual, in positive or negative terms (James and James, 1989, James et al., 1990). The finding of a general factor has been replicated by other researchers and described as representing the psychological safety and meaningfulness of the work environment for the individual employee (e.g. Brown and Leigh, 1996).

3.5.4. DEFINITIONS OF ORGANIZATIONAL CULTURE

‘Culture’ is a conceptual word that has been discussed for thousands of years by anthropologists, sociologists, historians and philosophers. In general, culture is a set of values, beliefs, common understanding, thinking and norms for behaviour that are shared by all members of a society. These beliefs and expectations prescribe the way work is approached and are the basis for socializing co-workers in the way things are done in the organization. Hofstede (1997, pages 179-180) defined organizational culture as “holistic, referring to a whole which is more than the sum of its parts, historically determined
reflecting the history of the organization, related to the things anthropologists study like rituals and symbols, socially constructed, created and preserved by the group of people who together form the organization, soft, and difficult to change”.

Furthermore, organizational culture has been described as a layered construct, with shared behavioural expectations and norms representing an outer, conscious layer and values and assumptions representing an inner layer that is less conscious to members of an organization (Rousseau, 1990). As stated by Hofstede (1998), behaviour is the visible part of culture while values represent the invisible part. Writers frequently describe culture as a ‘deeper’ construct than climate because it includes values and assumptions. Still, values and assumptions are held by individuals. However, references to ‘deeper’ aspects of culture parallel the ‘inner layer’ described by Rousseau (1990) and the ‘invisible’ part of culture described by Hofstede (1998) that cannot be observed directly and can only be derived indirectly from the behaviour and statements of individuals in the organization.

Although this inner layer is important to understanding culture, the ‘visible’ aspects of culture are critical to an organization’s functioning. For example, there is evidence that culture is expressed and transmitted among employees more through shared behavioural expectations and normative beliefs than through ‘deeper’ values or assumptions (Hofstede, 1998, Hofstede et al., 1990, Ashkanasy et al., 2000). That is, individuals in an organization can be fully aware of, or compliant with, behavioural expectations without being conscious of, or internalizing, the values and assumptions that lie at the core of those expectations. This is because shared expectations and norms may reflect the values and assumptions of organizational leaders or founders, rather than those formal and explicitly transmitted. Or, shared practices and norms may be determined by the conditions and realities that workers face on a day to day basis, independent of the values and assumptions of top management (Glisson and James, 2002). In either case, it is the expectations and norms that are shared, and not necessarily the assumptions and values they reflect. However, the assumptions and values that shape the shared expectations and norms give meaning to the dimensions of culture they compose and explain their influence on the work environment.

On the research on the dimensions that compose culture (Ashkanasy et al., 2000), two measures are prominent: Organizational Culture Inventory (OCI) (e.g. Cooke and
Rousseau, 1988, Cooke and Szumal, 1993, Xenikou and Furnham, 1996) and the Organizational Culture Profile (OCP) (e.g. Ashkanasy et al., 2000).

Other previous studies present different perspectives of culture in organisations. For example, Deal and Kennedy (1982) defined corporate culture by values, heroes, rites and rituals, and the communication networks. They classified Organizational Culture into four categories: tough-guy, macho culture; work hard/play hard culture; bet-your-company; and process culture. Quinn and Cameron (1983) suggested a framework of Organizational Culture comprising four types: clan, adhocracy, hierarchy and market. Deshpande and Webster (1989) defined Organizational Culture as the pattern of shared values and beliefs that help members of an organisation understand organizational functioning and thus provide them with norms for behaviour in the organisation, and proposed the same four types of organizational culture: clan, adhocracy, hierarchy and market.

Furthermore, Harrison and Stokes (1997) proposed four types of Organizational Culture: power-oriented, role-oriented, achievement-oriented and support-oriented. Baba et al. (1997) viewed organizational culture as a system comprising national, corporate and work culture.

Another approach to defining Organizational Culture is based on traits: involvement, consistency, mission and adaptability, developed by Denison (2000). The Denison (2000) model further divides each trait into three sub-dimensions: involvement includes empowerment, team orientation and capability development; consistency includes core values, agreement, and coordination and integration; adaptability includes creating change, customer focus and organizational learning; and mission includes vision, strategic direction and intent, and goals and objectives.

At the end, all these classifications are difficult to measure in practice, since one organization may have two or more types of organizational Culture (e.g. Hofstede, 1998).

3.5.5. CONCLUSION

The definitions presented here for organizational climate and culture underscore important differences between the two constructs that have implications for the research and, further, for the instantiation of these constructs in the work-family domain.
In general, climate is the individual’s perception of the psychological impact of his or her work environment on his or her own well-being. In contrast, culture focuses on the collective because culture describes the behavioural expectations and normative beliefs for those who work in a specific organization or organizational unit. In other words, unlike climate, culture is a property of the social system or work unit, not of the individual, and this difference is reflected in the shift in referent from the individual to the collective, reflecting the collective nature of culture (e.g. Verbeke et al., 1998, Glisson and James, 2002).

Additionally, although definitions of culture and climate vary from organization to organization (Verbeke et al., 1998), culture can be defined as the organizational norms and expectations regarding how people behave and how things are done in an organization (Glisson and James, 2002). In contrast, organizational climate reflects workers’ perceptions of, and emotional responses to, the characteristics of their work environment (e.g. Glisson and James, 2002, James et al., 1978, James and Sells, 1981). Both, culture and climate are held to influence attitudes in the workplace.

3.6. FAMILY-SUPPORTIVE WORK ENVIRONMENT

3.6.1. INTRODUCTION

After reviewing research on workplace family policy, Starrels (1992, page 261) concluded that “corporate culture may either advance or thwart development and effectiveness of work–family programmes”. For example, even where formal work–family policies and programmes are in place, managers may subvert them by refusing to allow their employees to participate or by applying the policies unevenly. Anecdotal evidences suggest that many employees are reluctant to participate in work–family programmes, such as flexible work schedules, because they fear their careers will suffer (Hammonds, 1997, Morris, 1997). Also, in some organizational cultures the amount of time spent at work is interpreted as an indication of employees’ contributions and career dedication (Starrels, 1992, Perlow, 1995, Lewis and Taylor, 1996, Lobel and Kossek, 1996), and these norms may make employees reluctant to take time off or to reduce their work hours to attend to family responsibilities. Thus, despite formal policies and programmes designed to help employees balance work and family, unsupportive work cultures may undermine the programmes’ effectiveness (Thompson et al., 1992).
In fact, employees today are offered a range of work–family benefits and programmes (Lobel and Kossek, 1996, Mitchell, 1997) but, although research suggests that these benefits can reduce the stress associated with balancing multiple roles (Thomas and Ganster, 1995), there is also evidence that many employees are not taking advantage of these benefits, due to fears of negative career consequences. At the end, the decision to adhere to such benefits is a personal one.

The criteria for this personal decision are related to the benefits of a family-supportive organizational culture, or briefly a work–family culture, which describes the shared assumptions, beliefs, and values regarding the extent to which an organization is perceived by its personnel to support and value reconciliation between work and family life (Thompson et al., 1999).

Despite the acknowledgment that the workplace environment is critical for balancing work and personal life (Thomas and Ganster, 1995, Friedman and Johnson, 1997), little empirical research has been directed toward examining employee perceptions regarding the extent that a work environment is family-supportive. Actually, just as other aspects of an organization’s culture have been shown to influence employee attitudes and behaviour (Trice and Beyer, 1993), employees’ perceptions about the work–family culture in their organizations would be expected to influence their attitudes about the organization as well as decisions about whether or not to use work–family benefits (Allen, 2001).

It is worth to notice that, if the terms organizational climate and organizational culture are quite commonly indiscriminately used, when it comes to the work-family domain the two terms are used interchangeably (Schneider, 2000). However both the collective organizational perspective and the individual employee’s perspective, normally related, as seen in the previous paragraph to organizational culture and climate respectively, are important and present.

Next paragraphs will be dedicated to a review of the concepts related to family-supportive work environment and advanced so far: family-supportive organizational culture and family-supportive organizational perceptions.
3.6.2. FAMILY-SUPPORTIVE ORGANIZATIONAL CULTURE

Work–family culture is still a relatively novel concept, launched in 1999 by Thompson et al.

Previously, Thomas and Ganster (1995) had posed that family-supportive work environments were composed of two major components: family-supportive policies and family-supportive supervisors. Both components exemplify organizational efforts to support employee needs to balance work and family responsibilities.

Later, Thompson, Beauvais, and Lyness (1999, page 392) developed a measure designed to assess work–family culture: “the shared assumptions, beliefs, and values regarding the extent to which an organization supports and values the integration of employees’ work and family lives”. This definition is consistent with both Schein’s (1990) and Denison’s (1996) conceptualizations of organizational culture as “the deep structure of organizations, which is rooted in values, beliefs, and assumptions held by organizational members” (Denison, 1996, page 624).

The literature suggests that there are at least three possible components of work–family culture (Thompson et al., 1999):

- time demands or expectations on how employees prioritize their work and family commitments

Formal or informal norms about the number of hours employees are expected to work, to spend at the office and to use their time (e.g., whether or not employees are expected to take work home) are important aspects of organizational culture that may affect employees’ behaviour (Bailyn, 1993, Schriber and Gutek, 1987). Moreover, in traditional labour models, working long hours often serves as a prime indicator of commitment and productivity. However, it clearly hinders the ability of employees to meet conflicting responsibilities (Bailyn, 1993). Moreover, it has been demonstrated that time-based conflict is a major source of work–family conflict (Greenhaus and Beutell, 1985) and that organizational expectations on the time employees devote to work strongly interferes with family responsibilities (Parasuraman et al., 1996, Frone et al., 1997b). On the contrary, organizations that have altered the way they define, measure, and appraise performance to create an environment in which their
employees can become more effective in both career and family pursuits (Morris, 1997, Hall, 1990) can be considered to be more family-supportive.

- perceived negative career consequences associated with utilizing work–family benefits or devoting time to family responsibilities

In traditional organizational cultures, visibility is the norm. According to Perlow (1995), the cultural assumption is that an employee’s presence at work, or what is sometimes called “face time,” is a direct indicator of his or her contribution and commitment to work. Thus, participating in work–family programmes, taking into account family demands and responsibilities, showing family-supportive attitudes and emotions may undermine an employee’s ability to show total commitment to the organization (Bailyn, 1993), resulting in negative performance evaluations and rewards, including promotions and size of salary (Perlow, 1995). In general, literature supports the idea that utilizing work-family benefits negatively affects career advancement, especially managerial ones (Perlow, 1995, Lewis and Taylor, 1996). Hence, many employees desiring to balance work and family are forced to choose between “fast track” career advancement and the “mommy track” or “daddy track” (Hall, 1990). Because of perceived negative career consequences, individuals might feel that they have little choice over accommodating their work to family, even if it is something they would like to do.

- managerial support and sensitivity to employees’ family responsibilities

The importance of supervisor support on employee outcomes, such as work satisfaction and life satisfaction, absenteeism, work–family conflict, and stress, is well established. Indeed, various authors (Frone et al., 1997b, Goff et al., 1990, Thomas and Ganster, 1995) found significant positive effects of supervisor supportiveness on these and other related variables. In fact, supervisors play a key role in the effectiveness of work–family policies and programmes because they facilitate or hinder the participation of the employees in work-family programmes or because they may reinforce cultural norms that undermine employees’ efforts to integrate their work and family lives or even because they are the ones that provide and grant such work-life options (Perlow, 1995, Starrels, 1992, Thompson et al., 1992).
Though it seems that there is a consensual definition of work-family culture, it still remains a complex phenomenon with many unresolved issues that limit our understanding of it.

For instance, simply consider the evidence that work units can develop distinctive cultures and climates, creating multiple cultures and climates within an organization (Hofstede, 1998). Multiple cultures and multiple climates develop as a function of the contexts within which members function on a day-to-day basis (Stackman et al., 2000). Distinct cultures and climates are likely to emerge within work units in an organization when the organization is large and the units work independently under, for instance, separate supervisors or in different geographical locations (Trice and Beyer, 1993).

Also the three different dimensions were independently defined but, actually, they are interdependent to some extent, as each reflects an aspect of the overall supportiveness of the culture for integrating employees’ work and family lives.

Beyond doubt is the fact that a company’s culture can influence employees’ perceptions about the awareness of the provision of work-family options and the accessibility, without potential negative consequences, to such benefits. For example, if a company rewards employees who spend long hours at work, offering flexible time or job sharing but such is not consistent with the underlying corporate culture, that makes it unlikely that employees will feel comfortable taking advantage of these programmes (Perlow, 1995, Thompson et al., 1992). In addition, managers may have difficulty figuring out how to appraise, develop, and compensate employees who do not fit the traditional mold (Bailyn, 1993). The search for the overall consistency is mirrored in the organizational perceptions employees form and share.

3.6.3. FAMILY-SUPPORTIVE ORGANIZATIONAL PERCEPTIONS

When characterizing a family-supportive work environment, in addition to work-family culture, it is crucial to examine the employees’ perceptions regarding the extent to which their organization is family-supportive. These perceptions differ from their perceptions regarding the family supportiveness of their manager, the third component of work-family culture described above. Such difference is observed, for example, when questioned if “In the event of a conflict, managers are understanding when employees have to put their family first?” versus being questioned if “In this organization it is generally okay to talk
about one’s family at work?” (Allen, 2001). Interestingly, organization referent items demonstrated noticeably lower factor loadings than did the manager referent items, thus making evident the importance of direct managerial support. In fact, an employee might perceive that his or her manager is family-supportive despite perceiving that the organization as whole is not and vice versa.

Support for such a distinction can be found in perceived organizational support literature. Eisenberger et al. (1986) specified perceived organizational support as employee “global beliefs concerning the extent to which the organization values their contributions and cares about their well-being” (p. 501). Perceived organizational support describes an attitudinal response to the organization as a whole that is distinct from the attitudinal response that an employee may form regarding his or her direct supervisor.

The research carried out by Allen (2001) showed that employees who perceived that the organization was less family-supportive experienced more work–family conflict, less job satisfaction, less organizational commitment, and greater turnover intentions than did employees who perceived that the organization was more family-supportive. It also concluded that benefit availability alone has a small effect on job attitudes and behaviour. On the other hand, the global perceptions that employees form regarding the extent the workplace environment is family-supportive appears to be strongly related to employee job attitudes and experiences, including the use of the available benefits. These findings highlighted the important role of family-supportive organization perceptions, namely as a mediator in the relationship between benefit availability and outcomes and between supervisor support and outcomes of interest.

Clearly, supervisors play a meaningful part in determining how employees perceive and experience the environment of the organization. On one hand, they have a direct impact on the mitigation of work-family conflict situations. On the other hand, since the provision and granting of benefit options is typically at their responsibility, their willingness to allow employees to take advantage of these benefits is likely to have a critical influence on employee job attitudes (Allen, 2001).

However, the positive effect of family-supportive benefits appears to be attributable to an enhancement of employee perceptions that the organization as a whole is family-supportive. It is also interesting to note the conclusion that when examining the two different sets of benefits, benefits associated with flexible work arrangements (e.g.,
flexible work hours and compressed working weeks) were more highly related to family-supportive organization perceptions than were dependent care supports. This is consistent with Rodgers (1992) and Thomas and Ganster (1995), who reported that the option of flexible scheduling work had significant effects on outcomes such as psychological and physiological indicants of job strain and they give employees greater control over how they manage work and multiple nonwork activities, thus facilitating employee efforts to achieve work/nonwork balance, whereas elder or child care-related benefits are normally recognized as an answer to a familiar basic social need.

3.6.4. FAMILY-SUPPORTIVE ENVIRONMENT AND GENERAL ORGANIZATIONAL CONTEXT

When considering measures of family-supportive environment and its relation with relevant employee outcomes, a question comes into mind that is whether their effects can be differentiated from those attributable to more global indicators of organizational support.

In fact, one of the most interesting findings of the stream of researches presented above (Thomas and Ganster, 1995, Thompson et al., 1999, Allen, 2001) is that work–family context is significantly related to outcomes such as job satisfaction, organizational commitment, turnover intentions, and work–family conflict. However, more global measures of organizational supportiveness, meaning not restricted to just the work–family domain, are also related to a similar and overlapping set of employee outcomes (Behson, 2002b). The commonly used organizational context measures are:

- **perceived organizational support**

  Perceived organizational support has been defined as “the global beliefs that employees form concerning the extent to which the organization values their contributions and cares about their well-being” (Eisenberger et al., 1986, page 500) and it has been demonstrated that it is correlated with organizational commitment, job satisfaction, absenteeism, and turnover intentions.

- **perceived fair interpersonal treatment**

  Perceived fair interpersonal treatment has been defined as “employees’ perceptions of the fairness of interpersonal treatment in their work environment” (Donovan et al.,
1998) and has been correlated with job satisfaction as well as psychological and physical withdrawal.

- trust in management

Trust in management has been defined as an employee’s “willingness to be vulnerable to the actions of management” (Mayer and Davis, 1999, page 124) and has been correlated with the perceived fairness of performance appraisal systems.

In a 2002 study (Behson, 2002b), Behson posed that general employee attitudes like job satisfaction were better explained when taken into account not only work-family constructs but also the general organizational context. On the other hand, perceptions of family-supportive contexts better explain outcomes more specifically related to work and family.

Behson also concluded (2002b, page 67) that “While it is clear that work–family context is related to overall employee affect, the variance in overall employee affect may be better explained by broader organizational phenomena. Thus, the marginal utility in assessing work–family context in order to explain general employee reactions may be limited. By matching the level of specificity in the organizational phenomena we are studying, we will be better able to detect meaningful relationships and gain a more nuanced insight into this very important topic.”

Behson does not mean that research on work–family context is neither valuable nor needed (Behson, 2002b). On the contrary, he recognizes that analyzing the work–family context and attempting to make organizations more supportive of families are certainly important activities. In fact, he also concluded, in line with former studies that a family-supportive context greatly contributes to employee outcomes most strongly and uniquely through its impact on work–family conflict. In turn and as seen in the previous paragraph, work–family conflict is linked to important and relevant organizational outcomes such as burnout, job performance, absenteeism, and turnover intentions.

3.7. CONCLUSION

The idea in brief is that work-family issues should also be framed as an organizational issue or at least alongside with general organizational issues, in order to have a more complete and accurate understanding of the phenomenon. Next chapter will follow this
stream by reviewing the literature relating to Social Responsibility of the Corporation, wondering whether the way the organization frames its social responsibility, external and internally, does have an influence on the employees’ perceptions regarding the extent to which their organization is family-supportive.
CHAPTER 4. CORPORATE SOCIAL RESPONSIBILITY

4.1. INTRODUCTION

During the last decades, researchers thoroughly investigated why firms respond to society issues such as social and environmental ones. Somehow, Corporate Social Responsibility practices, or at least what we would now consider as such, can be traced back to the patronage and charity practices from ancient times. Later on, the beginning of the industrial revolution with the concentration of labour in factories is a natural starting point and it gives us the scenario for the appearance of CSR as a formal field of research. But it is only circa 1950, that Howard R. Bowen presented what is generally accepted to be the first definition of Corporate Social Responsibility (Carroll, 2008).

Research on this field became rather relevant after the Second World War, when health insurance and pension programmes that represented the essence of the welfare capitalism became standard human resources management practices in large corporations and, in many European countries, were taken up at governmental level. This evolution, in parallel with the rising of the corporate form of business organization, led to the awareness of the research questions “what is a business for” and “what contribution does it make to society” (Handy, 2002). In fact, since the beginning it was difficult to differentiate what business men were doing for business reasons (in order, for example, to increment productivity) and what they were doing for social reasons (in order, for example, to make workers better and more contributing members of society) (Carroll, 2008). Most of these situations can, probably, be interpreted as a mix of both business and social motivations.

Despite a degree of ambiguity and disagreement on the answer to the previous questions, academic literature on CSR vastly flourished since then, reflecting the growing attention to the subject from different perspectives such as business, government and society in general. The range of stakeholders became wider and the issues researched under the umbrella Corporate Social Responsibility concept have also broadened in the past decades. Furthermore, some theories combine different approaches and use the same terminology with different meanings, which caused some misunderstandings in the practitioner and academic literature produced.
In 1972, Votaw wrote “corporate social responsibility means something, but not always the same thing to everybody. To some it conveys the idea of legal responsibility or liability; to others, it means socially responsible behaviour in the ethical sense; still to others, the meaning transmitted is that of ‘responsible for’ in a causal mode; many simply equate it with a charitable contribution; some take it to mean socially conscious; many of those who embrace it most fervently see it as a mere synonym for legitimacy in the context of belonging or being proper or valid; a few see a sort of fiduciary duty imposing higher standards of behaviour on businessmen than on citizens at large” (Votaw, 1972, page 25). Nowadays, this conclusion is still valid and it is the major reason to begin every literature review of CSR by defining or discussing the term itself.

Consistently, this chapter begins with the unfinished discussion of what is Corporate Social Responsibility, followed by the evolution of CSR as a field of research and the appearance of related concepts. Furthermore, a possible framework for CSR is described. The main reason for choosing such a frame is that it is a comprehensive one and it reflects the purpose and the way corporations understand their role in society. In fact, that is precisely the aim of having a CSR frame for my research, more than an operational frame to evaluate and diagnose social performance. Finally, when jointly considering both arenas - CSR and work-person/family life – some conclusions are conveyed.

4.2. DEFINING CORPORATE SOCIAL RESPONSIBILITY

Though it is a quite popular theme in business, academic and media communities, as McWilliams, Siegel and Wright (2006) recently declared: “there is no strong consensus on a definition for CSR”. Nowadays, there are as many definitions of CSR as there are disagreements over the appropriate role of the corporation in society (Crane et al., 2008).

Indeed, not only the definition became wider by encompassing different themes, such as environment and ethics, but also the very concept of Social responsibility or Corporate Social Responsibility has been subject to evolution. As Matten and Moon (2008) comment, CSR is a cluster concept which overlaps with such concepts as business ethics, corporate philanthropy, corporate citizenship, sustainability, and environmental responsibility. It is a dynamic and contestable concept that is embedded in each social, political, economic and institutional context.
For this reason, the intention of this paragraph is not to provide a definition of CSR or seeking to follow one. The intention is, by examining some of the definitions stated in literature, to identify some core and recurrent characteristics associated with CSR concept and that ultimately help to focus and delimit the wider construct.

Since the early years of the industrial revolution and the factory system (Wren, 2005), from the implementation of practices to improve the workers’ conditions to the consideration of corporation philanthropy and environmental consciousness, a long way has been done.

Provision of funding to individual or communitarian projects related to arts, education, churches, etc. by business leaders has been a common practice. However, a dilemma arose with the development of the concept of corporation and stewardship management regarding the trustee of stockholder’s property (Hay and Gray, 1974 cited in, Carroll, 2008), followed by the identification of corporations as institutions that, like other institutions (e.g. government), have social obligations to fulfil (Carroll, 2008). Combining both perspectives - stewardship and institution – the question of the Corporate Social Responsibility boosted a debate that went on for decades and still has no definite answer.

It is generally accepted to consider that the initial definition of Social Responsibility was the one stated by Howard R. Bowen in its seminal book Social Responsibilities of the Businessman (Bowen, 1953) as follows: Social Responsibility “refers to the obligations of businessmen to pursue those policies, to make those decisions, or to follow those lines of action which are desirable in terms of the objectives and values of our society.” (page 6). A few years later, and in line with Bowen, Keith Davis stressed the idea of framing social responsibility concept in a managerial context, when writing that it refers to “businessmen’s decisions and actions taken for reasons at least partially beyond the firm’s direct economic or technical interest” (Davis, 1960, page 70).

At the same time, William C. Frederick, another early pioneer, (Frederick, 1960) asserted that “social responsibility in the final analysis implies a public posture towards society’s economic and human resources and a willingness to see that those resources are utilized for broad social ends and not simply for the narrowly circumscribed interests of private persons and firms” (page 60).
Some differences can be noticed: Bowen and Davis’s definitions place its focus on the role of businessmen while Frederick’s one places its focus on society and the use of societal resources and, secondly, Bowen sees it as an obligation while the others consider it as an individual or corporate voluntary posture. This latter point was, recurrently, mentioned by some authors (e.g. McGuire, 1963) expressing the idea that the concept of social responsibilities supposes that the corporation has not only economic and legal obligations but also certain responsibilities to society which extend beyond these obligations.

Carroll, elaborating on CSR construct, assumes that these responsibilities “encompass the economic, legal, ethical and discretionary expectations that society has of an organization at a given point in time” (Carroll, 1979, page 500). The economic component of the definition suggests that society expects business to produce goods and services and sell them at a profit. Furthermore, just as society expects business to make a profit for its efficiency and effectiveness, society also expects business to obey the law and to accomplish its mission within the framework of legal requirements of the society in which it is incorporated. The last two responsibilities represented the kind of behaviour and ethical norms that society expects business to follow and the set of voluntary roles that business follows that are not explicit expectations though, somehow, it is socially expected to follow. A good example of the latter was the survey carried out in March 1946 by Fortune magazine asking businessmen about their social responsibilities. The answer was consistent with the idea that businessmen, and corporations after them, did have social consciousness principles (due to either ethics or religious basic values) that potentiated certain practices (Bowen, 1953, page 44).

Interestingly the results of a similar survey ran later, in 1980 to businessmen showed great ethical and religious differences. McMahon (1985) concludes that “these differences even reflect more than a strong divergence in their view of self, loyalty, family life and relationship to the firm. Goals have at times been replaced. Problems have changed. Life styles have shifted. Priorities have been re-evaluated. These observations are obvious. Less apparent, however, is the change in emphasis in concepts and principles as well as the contributions which religion has made to the past and the present views of business ethics, especially in the application of principles”.


Actually, later on, these four categories were reduced to three: economic, legal and ethical expectations (Schwartz and Carroll, 2003). Voluntary activities, initially included in discretionary category, such as making philanthropic contributions were later consider as included in the concept of corporate citizenship (Carroll, 1999) and this one was aggregated in the same category as ethical norms under the argument that society, explicit and implicitly, expects such norms of conduct to be followed (Schwartz and Carroll, 2003).

This distinction between the different categories of social responsibilities and the way corporations assume (or not) them was the basis for the emergence of related but distinct concepts, such as the Corporate Social Performance concept. S. Prakash Sethi, in a classic article (Sethi, 1975), defined it and distinguished between corporate behaviour that might be called “social obligation,” “social responsibility,” and “social responsiveness.” In Sethi’s model, social obligation is corporate behaviour in response to market forces or legal constraints” (page 70). The criteria here are economic and legal only. Social responsibility, by contrast, goes beyond social obligation. He stated, “Thus, social responsibility implies bringing corporate behaviour up to a level where it is congruent with the prevailing social norms, values, and expectations of performance” (page 62). Sethi stated that whereas social obligation is proscriptive in nature, social responsibility is prescriptive. The final category in Sethi’s model is social responsiveness. He regarded this as the adaptation of corporate behaviour to social needs. He considers this stage to be anticipatory and preventive. Though Sethi offered categories for assessing Corporate Social Performance he did not rigorously define the background concept of Corporate Social Responsibility.

Finally, another conclusion that can be drawned from the definitions presented so far is that they situate social responsibility as the interface between business and society. Clarence C. Walton, in its book Corporate Social Responsibilities (Walton, 1967), also frames the concept in the same way when saying that “the new concept of social responsibility recognizes intimacy between corporation and society and realizes that such relationships must be kept in mind by top managers as the corporation and the related groups pursue their respective goals” (page 18). The balance of a multiplicity of interests (Johnson, 1971) from different stakeholders (Freeman, 1984, Donaldson and Preston, 1995) is, indeed, the essence of the subject itself.
The basic idea of corporate social responsibility is that business and society are interwoven rather than distinct entities (Wood, 1991a); therefore, society has certain expectations for appropriate business behaviour and outcomes. These expectations can further be distinguished, though related, as expectations placed on all businesses because of their roles as economic institutions, expectations placed on particular firms because of what they are and what they do, and expectations placed on managers (and others) as moral actors within the firm.

Consistent with this line of thought and according to McWilliams and Siegel’s definition (McWilliams and Siegel, 2001, McWilliams et al., 2006), Corporate Social Responsibility can be defined as situations where the firm goes beyond compliance and engages in “actions that appear to further some social good, beyond the interests of the firm and that which is required by law”.

4.3. EVOLUTION OF CORPORATE SOCIAL RESPONSIBILITY AS A FIELD OF RESEARCH

4.3.1. THE FACTORY SYSTEM AND THE PIONEERS (UP TO 1950)

The industrial revolution created a new social environment and, with it, a new set of social and human problems. People’s needs were becoming more complex as they sought to adjust to life in the city and in the factory. The factory system led to a general rise of the standard of living (infant mortality decreased, life expectation increased and people, in general, were better able to feed, clothe and care for themselves) when comparing to the agrarian and domestic system (Wren, 2005). However, while creating the conditions for “people to gain leverage to a better life, new problems arose, mainly related to unsavoury working and living conditions (e.g. child and female labour, urban poverty, long working hours, labour unrest)” (page 59).

The novelty of such problems was also reflected on the way these pioneer entrepreneurs, business owners and founders, dealt with them. They dealt with them in a way highly related to their personal attributes and principles. Somehow the welfare movement that characterized this period is a mixture of humanitarianism, philanthropy and business acumen. Examples of practices include, for instance, the provision of hospitals,
bathhouses, lunch-rooms, recreational facilities and profit sharing (Wren, 2005, pages 269-270).

In examining this early period, it is clear that emerging businesses were especially concerned with employees. However, was the implementation of such practices motivated by business (i.e. making the workers more productive) or social reasons (i.e. helping to fulfill their needs and make them better members of society)? Did the implementation of such practices reflect individual or corporate philanthropic initiatives? Were they pure paternalism or did they reflect companies taking responsibility for their workers in a way that extended beyond normal business requirements?

There are no definitive answers to such questions, either then or now. However such early examples of social responsibility initiatives, ultimately, helped to shape business view on philanthropy, on what would evolve to the concept of CSR and to the larger relationship between business and society. Some contemporaneous writings (e.g. Barnard, 1938, Clark, 1939) were already elaborating on such themes through multiple perspectives.

4.3.2. SHAPING THE IDEA (1950S / 1960S)

Consistently with other classifications on the evolution of CSR concept (e.g. Murphy, 1978), Carroll (2008) classifies these decades as the time when CSR takes shape in the sense of the various “attempts to formalize or more precisely state what CSR meant” (page 27). Most of the topics that naturally fell in business and society arena (e.g. business-related politics, corporate law and regulation, industrial relations, macroeconomic policy) were already staked-out by more specialized disciplines. Yet the study on the responsibilities that businesses owed, or should owe, to the larger society had not been anticipated by other disciplines and thus they became the foundations for the academic field that focused on CSR as a field of research.

Beginning with the initial definition of Social Responsibility by Howard R. Bowen (Bowen, 1953) already stated and complemented by other scholars insights (e.g. Heald, 1957, Levitt, 1958, Selekman, 1959), three core ideas were consolidated (Frederick, 2006): the idea of corporate managers as public trustees; the idea of balancing competing claims to corporate resources and the acceptance of philanthropy as a manifestation of business support to good causes (Carroll, 2008).
Given the similarities and overlapping in the social background, life experiences, training and careers of such scholars, it is not surprising that the proper relationship between business and society was a broadly discussed topic among them and that their views regarding the morality of business would converge as well. Even Levitt (1958) the most sceptical of the idea that business leaders should proactively advance any social agenda, still shared many of their assumptions regarding the appropriate responsibilities of business and business leaders, namely in American society.

Actually, they were all sceptical of allowing extensive autonomy to top corporate managers in deciding for themselves the nature and extent of the responsibilities that they owed society. Their concerns regarding the distribution of wealth and income, the legitimacy of employee representation and collective bargaining and the regulation of business by an independent political process still remain crucial today. Indeed, so far as recent events have proven, relying on voluntary and personalized ethics has its limits.

In what could be considered as an anticipation of the stakeholder management theory, they all urged business leaders to assume, voluntarily, a degree of social responsibility, even though they were aware that it would be a mistake to leave it entirely to the discretion of executives to decide what constituted responsible behaviour. The limits of voluntarism and accountability were emergent issues. They recognized that executives might be flattered by appeals to their sense of responsibility but they doubted the effectiveness of such an approach since “it is much easier to dispense justice, to be benevolent, than it is to share power – especially with those who have the means to compel such sharing” (Levitt, 1958, page 39).

Dale (1960, pages 54-55) would stress even further such thought by writing: “is it desirable… that managers be given the broad social responsibility for allocating resources among various interest groups?... If managers really begin to function in this way, all the various parties of interest, and the general public, may well begin to ask for a voice in selecting them. It is contrary to all democratic tradition for constituents to have no say in the selection of their representatives and no way of calling them to account”.

This first generation of scholars were succeeded by a new cohort even more focused on specializing in the subject of Corporate Social Responsibility (Marens, 2008). Keith Davis (Davis, 1960), William C. Frederick (Frederick, 1960) and Clarence C. Walton (Walton, 1967) would reinforce the ideas of the previous generation by framing social
responsibility as “a public posture”, “beyond the firm’s direct economic or technical interest” and considering that, in general, public resources should be utilized for broad social ends.

Walton, in the already mentioned book Corporate Social Responsibilities (1967), also uncovers some other facets of CSR in order to be considered as such, namely a certain degree of voluntarism, adhesion to society through societal partners and organizations and the acceptance that the involved costs may not be directly linked to any kind of economic return (Walton, 1967). While the first ones have been generally accepted, the connection between the economic return or, better saying, the economic performance and social responsibilities has not been so easily acknowledged.

4.3.3. CRITIQUES, THEORIES AND COMPLEMENTARY THEMES (FROM 1970 ONWARDS)

Critical insights on CSR emerged from a variety of social science disciplines including economics and finance, political science and sociology and numerous fields in management, including strategic management, organizational behaviour, environmental management, economics, psychology, marketing, etc.

A early line of criticism emanated precisely from economics and finance scholars arguing that corporate managers were paying too much attention to the interest of non-shareholders groups or, even worse, pretending to do so as an excuse for self-dealing, and thus avoiding, or at least distracting themselves, from their duty to promote profitability and shareholder value. One of these earliest and most cited perspectives was the one by Friedman (1970), published in the widely read New York Times, in 1970, in which he wrote that the responsibility of managers is to maximize the return to shareholders and that any actions that further some social good, beyond the interest of the stockholders, can be viewed as deriving from an agency problem (Friedman, 1970, page 13). That is, as far as hw was concerned, managers who use corporate resources to further some social good are doing so only to advance a personal agenda such as promoting their self image. Moreover, corporate resources would be better utilized on value-added internal projects or returned to shareholders. In fact, in 1958, Levitt had already stated that “government’s job is not business and business’s job is not government” (Levitt, 1958, page 58).
The resulting controversy, added to the scepticism of business practices already noted by the earlier literature on CSR, induced different reactions from academy (Epstein, 1998). From one side, researchers tend to examine the relationship between CSR and financial performance, in an effort to assess the validity of concerns regarding a trade-off between investment in CSR and profitability (Carroll, 2008). From another side, the entrance in the field of scholars trained in philosophy resulted in a shift of argumentation. In general, they accepted the right of corporate executives to retain a high-level of autonomy while influencing this autonomy by offering credible arguments to counter those of agency theorists in favour of the hegemony of shareholder interests (Jones, 1983). The shift was also that, on the other hand, they barely conceded the role of law, seeing it as an imposed constraint to corporate behaviour, thus ignoring early discussions regarding overreliance on the voluntary constraint of executives (Marens, 2008).

On the tentative to answer to Friedman’s agency theory of corporate social responsibility, several researchers focused on the relationship between CSR and financial performance of the firm, in order to try to establish models, antecedents and consequents. Curiously, or not, there are studies reporting positive (e.g. Waddock and Graves, 1997, Hillman and Keim, 2001, Ruf et al., 2001), negative (e.g. Wallace and Worrell, 1988, Baucus and Baucus, 1997) and neutral impact (e.g. Aupperle et al., 1985, McWilliams and Siegel, 2000) of Corporate Social Responsibility on financial performance (Griffin and Mahon, 1997). According to some other scholars (e.g. McWilliams and Siegel, 2000), this inconsistency may be due to the fact that existing studies of the relationship between CSR and financial performance suffer from several important theoretical and empirical limitations. For example, they point out that one major concern is that these studies sometimes use models that are misspecified in the sense that they omit variables that have been shown to be important determinants of profitability, for example the intensity of R&D investment (McWilliams and Siegel, 2000).

A prompt response to Friedman’s theory was offered by Carroll who outlined a corporate social performance (CSP) framework (Carroll, 1979). This framework, while encompassing the philosophy of social responsiveness, the social issues involved and the social responsibility categories, allows researchers to test the relationship between social responsibility and firm financial performance.
Carroll’s (1979) four-part categorization of social responsibility, Preston and Post’s (1975) notion of public responsibility, and Sethi’s (1975) classification of companies as reactive, defensive or responsive where all seminal works on the elaboration of the concept of Corporate Social Performance. Wartick and Cochran attempted to reconcile these ideas in their integrative paper on Corporate Social Performance (Wartick and Cochran, 1985). They defined the CSP model as "the underlying interaction among the principles of social responsibility, the process of social responsiveness, and the policies developed to address social issues" (page 758) and showed how the different perspectives (economic responsibility, public responsibility, social responsiveness) could be incorporated into this framework.

During this period, Frederick (1994) argued that corporate social responsiveness was the appropriate concept to CSP research. He proposed a classification (Frederick, 1987) based on a conceptual transition from the ethical–philosophical concept of Corporate Social Responsibility (what he calls CSR1), to the action-oriented managerial concept of social responsiveness (CSR2). He then included a normative element based on ethics and values (CSR3) and finally he introduced a basic normative reference for social issues in management (CSR4) (Frederick, 1992, 1998).

Wood (Wood, 1991a, Wood, 1991b) took a step further and produced a definition of CSP as: “a business organization’s configuration of principles of social responsibility, processes of social responsiveness, and policies, programmes, and observable outcomes as they relate to the firm's societal relationships” (page 693).

As already mentioned, from 1980 onwards, scholars trained in ethical philosophy gained ascendance, most notably Donaldson (1982) and R. Edward Freeman (1984), strongly influencing the work of scholars originally trained in other disciplines (Marens, 2008). Led by these scholars two new paradigms of voluntary ethics came to the CSR arena: stakeholder theory (Donaldson and Preston, 1995, Freeman, 1984) and social contracting (Donaldson and Dunfee, 1994). In effect, stakeholder management and social contracting became functional substitutes for countervailing power and government regulation, substitutes more suitable to an era in which discussing the restraint or coercion of corporate behaviour was disfavoured.

Freeman (1984), in his stakeholder theory and building on Chester Barnard’s (1938) ‘inducement contribution’ framework, asserts that managers need to consider the interests
and goals of other groups connected to the corporation (e.g. workers, customers, suppliers, local community organizations) and that can influence firm outcomes. According to this view, it is not sufficient for managers to focus exclusively on the needs of stockholders or the owners of the corporation. Stakeholder theory implies that it can be beneficial for the firm to engage in certain CSR activities that non-financial stakeholders perceive to be important, because, without this, these groups might withdraw their support for the firm. Furthermore, stakeholder management is important not because these groups are themselves powerful institutions formed to compel such consideration through countervailing power, but because managers should accept the philosophical Kantian notion that other people are not just means, but ends in themselves (Evan and Freeman, 1993).

Stakeholder theory was expanded to voluntary social contract approach by Donaldson, Dunfee (Donaldson and Dunfee, 1994) and Preston (Donaldson and Preston, 1995), emphasizing the moral and ethical dimensions of CSR and the business case for engaging in such activity. Voluntary social contracting fills a role closer to what earlier ethicists awarded to government regulation, a way of imposing standards upon behaviour within commercial relationships such as employment, sales or land use, but one that gives the executives, not the government, the ultimate power to decide what these standards should be (Donaldson and Dunfee, 1994, Donaldson, 1982).

A myriad of studies were derived from these two theories by means of stressing a particular dimension of CSR or through the application of general and strategic management theories to CSR.

One of these theories was the stewardship theory (Donaldson and Davis, 1989, 1991) that is based on the idea that there is a moral imperative for managers to ‘do the right thing’, without regard to how such decisions affect the firm’s financial performance.

Jones (1995) applied institutional theory to CSR and concluded that companies involved in repeated transactions with stakeholders on the basis of trust and cooperation are motivated to be honest, trustworthy, and ethical because the returns on such behaviour are high. Institutional approaches have also been used to analyse environmental social responsibility (e.g. Jennings and Zandbergen, 1995).
Strategic leadership was also applied to CSR by Waldman et al. (2004). These authors stated that certain aspects of transformational leadership were positively correlated with the propensity of firms to engage in CSR and that such leaders were more eager to strategically employ CSR activities.

Furthermore, the thought of CSR and its strategic implications lead to the application of resource-based-view-of-the-firm (RBV) theory to CSR. Introduced by Wernerfelt (1984, 1995) and refined by Barney (2001, Barney et al., 2001), RBV theory maintains that if the resources and capabilities that constitute a firm are valuable, rare, inimitable and non-substitutable, they can constitute a source of sustainable competitive advantage. The first theoretical paper to apply the RBV framework to CSR came from Hart (1995), who focused exclusively on environmental social responsibility. Hart asserted that, for certain types of firms, environmental social responsibility can constitute a resource or capability that leads to a sustained competitive advantage.

Using the RBV framework, a more formal theory-of-the-firm model of profit maximizing CSR was posited in McWilliams and Siegel (2001). These authors outlined a model that could be used by managers to conduct cost/benefit analysis to determine the level of resources to devote to CSR initiatives. That is, they assess the demand for CSR and also evaluate the cost of satisfying this demand. Their conclusions are that in equilibrium, firms that engage in CSR will earn the same rate of profit as firms that do not engage in CSR. According to them, “CSR attributes are like any other attributes a firm offers” (McWilliams and Siegel, 2001, page 125) and this is a non-surprising but challenging conclusion.

All the diversity of research and theories represent valuable contributions to know and understand the nature of the relationship between business and society. The domain has broadened since it became unquestionable that business and society were intricately connected and, after that, many topics of study became of interest and relevant. CSR, or the lack thereof, became not just an attractive field of research but “a subject of vital interest to corporate survival and managerial autonomy” (Wood, 1991b, page 384).

As described, the three themes related to CSR that have captured the most attention in the 1990s have been Corporate Social Performance, business ethics, and stakeholder theory (Carroll, 1999). Recently, there is a renewed interest for corporate social responsibilities and new alternatives and wider concepts have been proposed, including corporate
citizenship (e.g. Matten et al., 2003, Logsdon and Wood, 2002) and corporate sustainability (van Marrewijk, 2003). Whether these turn out to be distinct areas of study or other ways of articulating / framing the same concerns still remains to be seen. Indeed corporate concepts such those may be broadly or narrowly envisaged. In one case or the other, they seem to overlap more or less with the previously mentioned themes.

4.3.4. THE NEW CENTURY (2000S)

The proliferation of approaches, some of them controversial and limited in scope, did not tend to an integrated view of the CSR construct. Thus, instead of seeking for a clear and unquestionable definition of CSR, researchers during the last decade aimed to identify some core and recurrent characteristics that illustrate the main aspects around which the definitional and research debates tend to centre (Crane et al., 2008).

One of the most complete and general systematization of such characteristics is the one presented by Crane, Matten and Spence (Crane et al., 2008). According to them, the six core characteristics that are evident and “capture the main thrust of CSR” (Crane et al., 2008, pages 7-9) are: Voluntary, Internalizing or managing externalities, Multiple stakeholder orientation, Alignment of social and economic responsibilities, Practices and values and Beyond philanthropy.

- Typically CSR initiatives are voluntary. It means that, though most of them are seeking a compliance with societal moral norms, they are not compulsory in legal terms; they go beyond regulation and law. Critics of the voluntarism in CSR argue that it is “its major flaw and that legally mandated accountability is where attention should really be focused” (Crane et al., 2008, page 7).

- CSR activities can/should also deal with externalities, namely those that have negative impacts on the lives of people in general and, in particular, where the business is located. For instance, taking pollution as an example, though regulation firms can be forced to internalize some of its costs, a voluntary assumption of the costs or implementation of measures to mitigate and manage them. Any of these initiatives would be defined as a CSR initiative (Husted and Allen, 2006).

- CSR is also about considering a range of interests among different stakeholders other than just shareholders. Even with no general agreement on how much importance
CHAPTER 4

should be given to others than shareholders and the motives of giving them that emphasis, certainly to take into account impacts of business decisions on other stakeholders is the essence of CSR.

• This balance between different interests from different stakeholders leads to another common characteristic on CSR initiatives and that is the alignment of economic responsibilities with social ones. This alignment, while recognizing the relevance of both profitability and social performance, frames CSR as a business case, reinforcing its strategic component.

• Though it is clear that CSR is about a set of particular business practices and strategies as described, normally it also requires an underlying philosophy or set of values that ultimately demonstrates to all stakeholders, including shareholders, why firms engage in CSR initiatives.

• While stressing the voluntary character of the initiatives, modern CSR activities refuse to be associated with the paternalism, the largesse or the pure philanthropy spirit of a set of discretionary activities. CSR claims that to be considered as such it must be built-in and not “bolted on” to the core business and practices of the firm (Grayson and Hodges, 2004).

Alongside the identification and deepening of the relevant characteristics that delimit the concept of CSR, the development of specific and emerging areas, such as sustainability and citizenship, insert CSR in broader constructs (e.g. Henriques and Richardson, 2004).

One of the umbrella concepts, related to corporate sustainability and reflecting the tendency of public reporting and very popular this century, is the triple-bottom-line” accounting. Initially created by the management consultant John Elkington (1994, 1997), it was soon adopted and explored by academic literature. According to the triple-bottom-line notion, organisations should report not only on their financial performance, but also on their social and environmental performance. The triple-bottom-line concept focuses corporations not just on the economic value that they add, but also on the environmental and social value that they add (or destroy) (Elkington, 2004).

At its narrowest, the term triple-bottom-line has been used as a framework for measuring and reporting corporate performance against economic, social and environmental parameters. At its broadest, the term is used to capture the whole set of values, issues and
processes that companies must address in order to minimise any harm resulting from their activities and to create economic, social and environmental value. The three lines represent society, the economy and the global ecosystem. All three of them are interdependent and represent the ultimate bottom line (Elkington, 2004).

Further Elkington (2004) also draws a systematization of the drivers of the corporation engagement in environmental and social responsibility. According to him, the drivers are: the challenge of operating in non-familiar, competitive, global markets more permeable to; the shift to new human and societal values-based corporate frameworks; the international pressure that fuels transparency and accounting; the management of the complete production life cycle, from the extraction/acquisition of raw materials to recycling or disposal life-cycle technology; the demand for new models of relationship and partnership, between companies and other organizations (for example, ONGs or campaign groups); the consideration of a stronger long-time dimension on what business is going and planning to do and the improvement of corporate governance systems towards a better way to address sustainability issues, associated requirements and public pressures.

The systematization of the characteristics presented (Crane et al., 2008) is important to recognize and define what is (or is not) within the scope of CSR initiatives by companies and, thus, provide a criterion for uniformity of further analysis.

On the systematization of the drivers made by Elkington (2004), although interesting it is simplistic in that it only considers external drivers, related to the company's competitive strategy. Certainly they are relevant drivers but they do not exhaust all set of motifs why the company can decide to engage in socially responsible initiatives, in particular, when considering initiatives related to the company's internal mission.

Furthermore, as these scholars also observe (Crane et al., 2008), the meaning and relevance of CSR will vary according to organizational and national context. Indeed, one could say that there are as many perspectives of CSR as there are of organizations depending on the economic sector, ownership and governance structure, organizational form, dimension, location, etc.

These considerations led to the search for a more comprehensive framework for Corporate Social Responsibility - A framework that differentiates corporations by what
they are and not by what kind of external drivers are pushing them. Such a framework should be centred on the corporation and its point-of-view on its core responsibilities, its external and internal mission, its leitmotif with respect to CSR. Drivers can be external, like the market where they are operating, but also internal, for example the profit they are pursuing or the ethical requirements they would like to fulfil.

4.4. A FRAMEWORK FOR CORPORATE SOCIAL RESPONSIBILITY

As Carroll argued (Carroll, 1979), and Crane, Matten and Spence (Crane et al., 2008) reinforced, when organizations engage in Corporate Social Responsibility they have in mind, explicit or implicitly, a basic definition of the concept, “an understanding/enumeration of the issues for which a social responsibility existed (or, in modern terms, stakeholders to whom the firm had a responsibility, relationship, or dependency), and a philosophy of responsiveness to the issues” (Carroll, 1979, page 499). This framework can be quite different from organization to organization.

Consistent with this thought, in that same article (Carroll, 1979), Carroll provided a three-dimensional model defined by:

- categories of CSR or domains of responsibility (economic, legal, ethical and discretionary) Recently, Schwartz and Carroll (2003) have proposed an alternative approach based on only three core domains (economic, legal and ethical responsibilities) and a Venn model framework, instead of a pyramid.

- range of social issues that business must address (e.g. consumerism, environment, product safety)

- and managerial philosophies or modes of social responsiveness (reaction, defence, accommodation and pro-action).

Frameworks, like this one, incorporating operational and behavioural aspects of corporate endeavour generally reflect the concept of Corporate Social Performance and they represent an evolution from early definitions and classification of Corporate Social Responsibility (e.g. Frederick, 1987) which were deeply based in philosophic stances. Since then, scholars revised and adapted existing formulations of Corporate Social
Responsibility (e.g. Wartick and Cochran, 1985, Wood, 1991a) with the intention of defining a guiding framework that provides an outline of what needs to be considered (policies, programmes, processes, and social outcomes) in evaluating CSR.

As time went by, observing that a firm having social programmes and policies can be seen as responsive to social expectations, but not necessarily therefore as socially responsible, Wood (1991a) and mainly Swanson (1995) reoriented CSR models re-shifting the focus back to the core responsibilities and philosophical rationale for socially responsible corporate practices. This line of research is much more in line with my research in what concerns CSR: the purpose of CSR and the way corporations see their role regarding CSR, more than an assessment of CSR practices and corporate social performance and responsiveness.

Within this line of research, a comprehensive classification of the main underlying CSR philosophies and approaches an organization can follow is the one presented by Garriga and Melé (2004). It divides CSR approaches and theories in four groups:

1) **instrumental approaches,**

in which the corporation is seen only as an instrument for wealth creation, and its social activities are only a means to achieve economic results.

Corporations consider themselves as an instrument for wealth creation and that this is their sole responsibility regarding society. Representative of this approach is the already discussed Friedman view that “the only one responsibility of business towards society is the maximization of profits to the shareholders within the legal framework and the ethical custom of the country” (Friedman, 1970).

Any approach to engage in social initiatives is to be understood and framed as a mean to the ultimately end of profit and wealth creation. CSR is seen as a strategic tool to achieve economic objectives and, ultimately, wealth creation.

Concern for profits does not exclude taking into account the interests of all who have a stake in the firm (stakeholders). It has been argued that in certain conditions the satisfaction of these interests as well as a adequate level of investment in philanthropy and social activities is acceptable and, in some circumstances, it can contribute to maximizing the shareholder value (Mitchell et
al., 1997; Odgen and Watson, 1999). So CSR is a question of enlightened self-interest (Keim, 1978).

Approaches driven by the maximization of the share value, through short-term profits orientation or through the achievement of competitive advantages, including the so-called cause-related marketing, which will produce long-term profits, are typical from this group of corporations.

This approach is derived from fiduciary capitalism theory of CSR, since managers are seen as fiduciary agents of the owners of the company’s capital, without any other obligation than that of fulfilling their fiduciary duties in compliance with the law and, normally, the ethical customs of the country. Management is ‘shareholder value-oriented’ and value maximization of the share is taken as the supreme business goal. This is the theory that underlies traditional neoclassical economic theory, primarily concerned with shareholder utility maximization.

Generally, this theory goes along with the already cited agency theory (Ross, 1973, Jensen and Meckling, 1976). Also in this theory, managers are agents of the owners and bear fiduciary duties towards them.

Today, it is commonly accepted that under certain conditions the satisfaction of social interests contribute to maximizing the shareholder value and most large companies pay attention to CSR, particularly in considering the interests of people with a stake in the firm (stakeholders). In this respect, (Jensen, 2000) has proposed what he calls ‘enlightened value maximization’. This concept specifies long-term value maximization or value-seeking as the firm’s objective, which permits some trade-offs with relevant constituencies of the firm.

To distinguish profitable CSR from others which are not, Burke and Logsdon (1996) have proposed the concept of ‘Strategic Corporate Social Responsibility’ (SCSR) to refer to policies, programmes and processes which yield "substantial business related benefits to the firm, in particular by supporting core business activities and thus contributing to the firm’s effectiveness in accomplishing its mission." (page 496). From this perspective, there is an ‘ideal’ level of CSR determinable by cost-benefit analysis and depending on several factors.
(McWilliams and Siegel, 2001). This requires a careful calculation of the optimal level of social output in each situation for maximizing shareholder value.

2) political approaches,

in which corporations recognize the business and social power they have in society and the inherent responsibility on the use of this power in the social and political arena;

In consequence, corporations accept they have social duties, as well as certain rights, and they see CSR as the way to cooperate with society and fulfill their responsibilities. “Social responsibilities of businessmen arise from the amount of social power that they have” – social power equation - (Davis, 1967, page 48) and “whoever does not use his social power responsibly will lose it. In the long run those who do not use power in a manner which society considers responsible will tend to lose it because other groups eventually will step in to assume those responsibilities” – iron law of responsibility - (Davis, 1960, page 63).

Corporations that approach CSR based on this sense of social responsibility, normally frame their approaches in concepts such as Corporate Constitutionalism or Corporate Citizenship theories, both taken from political science.

Corporate Constitutionalism establishes that, like government which power is limited by the Constitution, business power is also limited and limits come from pressures from the different stakeholders. These groups do not annihilate power but, instead, they define conditions for its responsible use (Davis, 1967).

Though some scholars (e.g. Carroll, 1999) believe that Corporate Citizenship is a concept that largely overlaps with other theories on the responsibility of business in the societal arena, others prefer an extended view of corporate citizenship (e.g. Matten et al., 2003). In this latter notion, corporations, gradually replace the traditional institution of citizenship, namely government, entering the arena of citizenship as government fails in the protection of citizenship. As previously seen the term ‘corporate citizenship’ was introduced in the 80’s into the business and society relationship mainly through practitioners (Altman and Vidaver-Cohen, 2000). However, the idea of the firm as a citizen already had appeared with several pioneers in the CSR field, including McGuire (1963) and Davis (1973).
The latter, for instance, argues that “social responsibility begins where the law ends. A firm is not socially responsible if it merely complies with the minimum required of the law, because this is what a good citizen would do.” (page 313).

Eilbert and Parket (1973), already in the 70’s, explained that ‘good neighborliness’ similar to citizenship entails two meanings. First, “not doing things that spoil the neighborhood” and, second, “the commitment of business, or Business, in general, to an active role in the solution of board social problems, such as racial discrimination, pollution, transportation, or urban decay.” (page 7). Indeed, the term citizenship is at the core of the corporate citizenship notion which, according to Logsdon and Wood (2002), is not equivalent and should not be confused with individual citizenship.

Although, the concept of corporate citizenship was previously understood as synonymous of corporate philanthropy, now is frequently used as equivalent of corporate social responsibility (e.g. Logsdon and Wood, 2002, Wood et al., 2006). This approach emphasizes that business is part of the society and should participate in social life, respecting universal human rights and contributing in different ways to the social well-being, both in the local and global arenas.

The term ‘citizenship’, taken from political science, is at the core of the ‘corporate citizenship’ notion. The notion of citizen evokes individual duties and rights within a political community. However, it also contains the more general idea of being part of a community. Business firms are seen as an integral part of the society and for this reason they ought to contribute to the common good of such society, first of all to the community in which they operate, as ‘a good citizen’.

Concluding, theories and approaches on corporate citizenship are focused on rights, responsibilities and possible partnerships of business in society.

3) integrative approaches,

in which the corporation is focused on the satisfaction of social demands, arguing that business depends on society for its existence, continuity and growth.

Corporations following this approach argue that business depends on society for its continuity and growth and even for the existence of business itself. Social
demands are generally considered to be the way in which society interacts with
business and gives it a certain legitimacy and prestige. As a consequence,
corporate management should take into account social demands, and integrate
them in such a way that the business operates in accordance with social values.

So, the content of business responsibility is limited to the space and time of each
situation depending on the values of society at that moment, and comes through
the company’s functional roles (Preston and Post, 1975). In other words, there is
no specific action that management is responsible for performing throughout time
and in each industry. Basically, the theories of this group are focused on the
detection and scanning of, and response to, the social demands that achieve social
legitimacy, greater social acceptance and prestige.

Typical theories are Social responsiveness, Stakeholder management and
Corporate Social Performance.

Social responsiveness, or responsiveness in the face of social issues, and processes
to manage them within the organization (Sethi, 1975). This approach was soon
widened with the concept “Issues Management” (Wartick and Rude, 1986) which
includes the former but emphasizes the process for making a corporate response to
social issues as “the processes by which the corporation can identify, evaluate and
respond to those social and political issues which may impact significantly upon
it”.

The stakeholder management approach is oriented towards stakeholders or people
who affect or are affected by corporate policies and practices. Stakeholder Theory
of CSR is related to the belief that “corporations have an obligation to constituent
groups in society other than stockholders and beyond that prescribed by law or
union contact.” (Jones, 1980, pages 59-60). The term ‘stakeholder’, closely related
to stockholder, was meant by Freeman “to generalize the notion of stockholder as
the only group to whom management need to be responsible.” (Freeman, 1984,
page 31). Thus, stakeholder theory takes into account individuals or groups with a
‘stake’ in, or claim on, the company, including shareholders, employees,
customers, supplier and local community.
Freeman (1984) presented two basic principles, which underpin stakeholder management. The first is that the central goal is to achieve maximum overall cooperation between the entire system of stakeholder groups and the objectives of the corporation. The second states that the most efficient strategies for managing stakeholder relations involve efforts, which simultaneously deal with issues affecting multiple stakeholders.

Corporate Social Performance (CSP) theory has evolved from several previous notions and approaches, that can be traced to Howard R. Bowen (1953), who explained that social responsibility of businessmen (at this time the presence of women in management was scarce) “refers to the obligation of businessmen to pursue those policies, to make decisions, or to follow those lines of action which are desirable in terms of the objectives and values of our society” (1953, p. 6). In 1979, Carroll introduced the concept of “corporate social performance”, making a synthesis of basic principle of social responsibility, concrete issues for which social responsibility exists and the specific philosophy of response to social issues. Wartick and Cochran (1985) extended the Carroll approach suggesting that corporate social involvement rests on the principles of social responsibility, the process of social responsiveness and the policy of issues management. A new development came with Wood (1991), who gave the basic model of CSP currently applied. This CSP model includes: (i) principles of corporate social responsibility, expressed on three levels: institutional, organizational and individual; (ii) processes of corporate social responsiveness, and (iii) outcomes of corporate behavior.

The ‘Institutional Principle’, which is also known as the ‘Principle of Legitimacy’, basically states that “Society grants legitimacy and power to business and, in the long run, those who do not use power in a manner which society considers responsible will tend to lose it.”(Wood, 1991a, page 696) In accordance with the ‘Organizational Principle’ business should adhere to the standards of performance within law and the existing public policy process. The ‘Individual Principle’, also known as ‘the Principle of Managerial Discretion’ expresses the idea that “since managers are moral actors, they are obliged to exercise such discretion, within every domain of corporate social responsibility, within which they have influence in order to promote socially responsible outcomes” (Wood, 1991a, page 696).
More recently, social expectations that have been considered in this model, have become more specific in what should be an appropriate corporate social behaviour and have broaden their spectrum to new actors (for example, non-governmental organizations, media, and communities). Furthermore, more corporations are being pro-active in publishing reports on economic, social and environmental performance, following the idea of triple-bottom line (Elkington, 1997). However, though complex as it appears, in essence, the conceptual foundations of this theory remain inalterable.

4) ethical approaches

Based on ethical responsibilities of corporations to society and as a consequence, firms ought to accept social responsibilities as an ethical obligation above any other consideration.

This group of theories or approaches focuses on the ethical requirements that cement the relationship between business and society. They are based on principles that express the right thing to do or the necessity to achieve a good society.

Some of the main approaches take philosophical notions as the referential value for Corporate Social Responsibility. These notions can be, for instance, universal human rights, (e.g. UN Global Compact initiative), especially relevant in the global market place (Cassel, 2001) or, in general, the common good of society (e.g. ‘‘The Caux Roundtable Principles for Business’’ initiative), maintaining that business, as with any other social group or individual in society, has to contribute to the common good, because it is a part of society. In fact, business contributes to the common good in different ways, such as creating wealth, providing goods and services in an efficient and fair way, at the same time respecting the dignity and the inalienable and fundamental rights of the individual. Furthermore, it contributes to social well-being and a harmonic way of living together in just, peaceful and friendly conditions, both in the present and in the future (Melé, 2009).

Whatever the philosophical stances corporations may support for considering ethical requirements, approaches followed by this group of corporations are
usually known as the normative stakeholder Management and sustainable development.

Stakeholder management has become an ethically based theory mainly since 1984 when Freeman wrote Strategic Management: a Stakeholder Approach. In this book, he took as starting point that “managers bear a fiduciary relationship to stakeholders” (Freeman, 1984, page XX), instead of having exclusively fiduciary duties towards stockholders, as was held by the conventional view of the firm.

In fact, stakeholder theory was first presented as a managerial theory. “The stakeholder concept –wrote Freeman in 1984– provides a new way of thinking about strategic management – that is, how a corporation can and should set and implement direction. By paying attention to strategic management executives can begin to put a corporation back on the road to success.” (p. vi) However, it is also a normative theory which requires management to have a moral duty in order to protect the corporation as a whole and, connected with this aim, the legitimate interests of all stakeholders (Freeman, 1997). In Evan and Freeman’s words: “management, especially top management, must look after the health of the corporation, and this involves balancing the multiple claims of conflicting stakeholders.” (Evan and Freeman, 1993, page 151).

These authors base legitimacy of the stakeholder theory on two ethical principles, respectively called: “Principle of Corporate Rights” and “Principle of Corporate Effects”. Both principles are based on the Kantian motto of respect for persons. The former establishes that “the corporation and its managers may not violate the legitimate rights of others to determine their future.” The latter focused on the accountability of actions by stating that “the corporation and its managers are responsible for the effects of their actions on others.”

In a similar way, Donaldson and Preston (1995, page 67) held that the stakeholder theory has a normative core based on two major ideas (1) stakeholders are persons or groups with legitimate interests in procedural and/or substantive aspects of corporate activity (stakeholders are identified by their interests in the corporation, whether or not the corporation has any corresponding functional interest in them) and (2) the interests of all stakeholders are of intrinsic value (that is, each group of stakeholders merits consideration for its own sake and not merely because of its
ability to further the interests of some other group, such as the shareowners). In short, this stakeholder approach grounded in ethical theories differs from the former by presenting a different perspective on CSR, in which a normative core of ethical principles is central and required, in order to point out how corporations have to be governed and how managers ought to act (Freeman, 1994).

The World Business Council for Sustainable Development (World Business Council for Sustainable Development, 2000, page 2) defines sustainable development as requiring “the integration of social, environmental, and economic considerations to make balanced judgments for the long term”. Gladwin and Kennelly had already argued that sustainable development is “a process of achieving human development in an inclusive, connected, equiparable, prudent and secure manner.” (Gladwin et al., 1995, page 876). However the approach to achieve such sustainability is not consensual. A generally accepted and pragmatic proposal is to extend the traditional “bottom line” accounting, which shows overall net profitability, to a “triple bottom line” that would include economic, social and environmental aspects of corporation, though this is highly dependent of the circumstances in which the organization operates.

In conclusion, the preceding description of four basic CSR theories and related approaches can be summed up as in Table 6, according to the way the corporation sees its role in relation to business and society.

<table>
<thead>
<tr>
<th>Approach</th>
<th>Instrumental</th>
<th>Political</th>
<th>Integrative</th>
<th>Ethical</th>
</tr>
</thead>
<tbody>
<tr>
<td>Driver</td>
<td>Profit</td>
<td>Power</td>
<td>Legitimacy and Prestige</td>
<td>Ethical Requirements</td>
</tr>
<tr>
<td>Purpose</td>
<td>Wealth creation</td>
<td>Power and Position of business</td>
<td>Integration of social demands on society for business existence, continuity and growth</td>
<td>Do the right thing to do / The need to achieve a good society</td>
</tr>
<tr>
<td>Role of the Corporation</td>
<td>Instrument, strategic tool for competitive advantage</td>
<td>Accomplishment of inherent responsibilities that arise from the social power the corporation has</td>
<td>Integrate social demands in such a way that business operates in accordance with social values / fiduciary duties to shareholders</td>
<td>Fiduciary relationship to stakeholders</td>
</tr>
<tr>
<td>Strategy</td>
<td>Economic and Corporate</td>
<td>Stakeholder</td>
<td>Stakeholder</td>
<td></td>
</tr>
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</table>
4.5. CORPORATE SOCIAL RESPONSIBILITY AND WORK-PERSONAL/FAMILY LIFE

When looking at both arenas Corporate Social responsibility and Work-Personal/Family life, there are some similar conclusions that can be drawn from the correspondent literatures reviewed.

The literature on Corporate Social Responsibility, whether it elaborates on the definition of the concept or it discusses and studies the incorporation of operational and behavioural aspects of corporate strategy and efforts, it always situates CSR at the interface between business and society. No matter the purpose or approach considered, CSR is rooted in the relationship between business and society.

Interestingly the literature reviewed in the previous chapter on Work-Personal/Family life, also suggested that there is a relationship between work and family grounds. Moreover both worlds and the interrelationship between them is essential, constituent and intrinsic to personal life.

However, conceptually, work can characterized the relationship between the individual and the organization and organization is a construct embedded in business, in general. As highlighted previously, the definition of “work” is restricted to the domain associated with paid professional employment, no matter whether it is considered obligation or leisure and no matter what kind of working arrangements (e.g. full-time, part-time) is considered. Organization can be described as a social unit of people, systematically structured and managed to meet a need or to pursue collective goals on a continuing basis.

Adapted from the Classification of CSR of Garriga and Mele (2004)

Table 6 – Classification of CSR approaches

<table>
<thead>
<tr>
<th>Approach</th>
<th>Instrumental</th>
<th>Political</th>
<th>Integrative</th>
<th>Ethical</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>competitive advantages</td>
<td>Constitutionalism, Corporate Citizenship</td>
<td>Management, Corporate Social Performance, Corporate Social Responsiveness</td>
<td>Management, Sustainable Development</td>
</tr>
<tr>
<td>Theory</td>
<td>Fiduciary Capitalism</td>
<td>Corporate Citizenship</td>
<td>Corporate Social Performance</td>
<td>Stakeholder Management</td>
</tr>
</tbody>
</table>
These people work for the Organization in order to achieve personal and organizational goals. When referring to organization, specifically it is considered the determinants of corporate behaviour that may be operating inside the corporation, such as, as seen in previous chapter, the corporation’s culture and work environment. Organization is embedded in business as it is normally designed and structured to provide goods, services or both, to consumers or to society in general. Also, the wide term of business is used, independently of the economic model, ownership and whether it is a for-profit, not-for-profit or state-owned firm.

Moreover, Organizations as business are open systems in that they affect and are affected by the environment beyond their boundaries, namely the social environment, as seen in this chapter.

On the other hand, family is a social institution that is instantiated in society and that reflects the society where it is inserted. It naturally interacts with people that constitute the family. Being part of society, it affects and is affected by the relationship between business and society. For example, in places where there is a major employer, it is evident that family and community-life is, daily, affected by the policies and practices of such firm. And the reverse is also true: firm performance, productivity and practices are affected by the cultural context where it is implanted.

Applying this rationale and overlaying the different arenas, it is possible to visualize the evolution from the schema in Figure 5 to the schema in Figure 6.

![Figure 5 – Integration of work – personal / family life](image-url)
4.6. CRITICAL PERSPECTIVES

4.6.1. ON CORPORATE SOCIAL RESPONSIBILITY

Criticisms of Corporate Social Responsibility relate back to the theoretical perspectives outlined in previous sections. For example the argument that “it stifles the primary purpose of business” is rooted in neo-liberal economics whereas the view that “it favours the interests of business” is a development of the long-standing critique of the free enterprise externalizing its costs onto wider society (Blowfield and Murray, 2008). Other authors (e.g. Banerjee, 2008) take an even more critical perspective on the wider debate about the role of business in society and argue that, ultimately, Corporate Social Responsibility is a strategy of wealth creation and that its scope is too narrow.

These authors critically examine the content of contemporary understandings of terms such as corporate citizenship, corporate social responsibility, corporate sustainability and sustainable development. They provide an alternate perspective that views discourses of such terms as ideological movements that are intended to legitimize the power of large corporations (Mitchell, 1989). They argue that such discourses are defined by narrow business interests and, ultimately, serve to curtail interests of external stakeholders (Banerjee, 2008).

According to them, whereas the primary relationship between business and society has been and continues to be an economic one, rising public concern about the social and environmental impacts of economic growth and increased legislation in areas of social welfare and environmental protection have led many corporations to assess the social and
environmental impacts of their business activity. However, such discourses normally represent and construct the relationship between business and society based on corporate interests, not societal interests (Windsor, 2001). Even the sustainable development paradigm, despite claims of a paradigm shift, is based on an economic, not ecological, rationality, argues Banerjee (2003).

Regarding the term corporate citizenship, contemporary notions of corporate citizenship are argued to contribute little or nothing to existing notions of corporate social responsibility and corporate philanthropy. Moreover, they contribute to conceptual confusion that may even be counter-productive (Matten et al., 2003).

Based on a political concept and drawing on broader notions of citizenship, corporate citizenship consists of a bundle of rights conventionally granted and protected by governments of states. However, the more that governmental power and sovereignty have come under threat, the more that relevant political functions have gradually shifted towards the corporate sphere and it is at this point where “corporate” involvement into “citizenship” becomes an issue. Implications for business and society relations are far more than the idea that corporations have discovered their “place in society”, in a harmonious co-existence with their “fellow citizens” living up to a vision of citizenship including both a mixture of fair rights and responsibilities. Large corporations do not share a similar status of citizenship as individuals. “Corporate” citizenship could imply a substantially different notion, argues Matten (2003). The corporate involvement in this context does not mean that corporations bravely share in the citizen rights, but that they have gradually amounted to replace the most powerful institution in the traditional concept of citizenship, namely Government. Corporations assume responsibility for the protection and facilitation of social, civil and political rights and corporate “citizenship”, Matten suggests (2003), can and should be re-conceptualized to mean exactly this. The implications are that corporations are engaging as facilitators of the citizen process, regardless of whether they are explicitly setting out to be “good corporate citizens”.

Another critical perspective focuses on the notion of organizational “stakeholders”. Banerjee argues that stakeholder theory of the firm represents a form of stakeholder colonialism that, ultimately, serves to regulate the behaviour of stakeholders (2008).

A common characteristic among the definitions of Corporate Social Responsibility is its voluntary and discretionary nature (Crane et al., 2008). There is also an expectation that
Corporate Social Responsibility activities exceed a corporation’s legal responsibilities, understood as the obligations to all stakeholders specified through regulation and corporate governance. However, some authors like Orlitzky et al. (2003) and corporations have claimed that the literature is “over inclusive” in defining organizational stakeholders and called for a more “restrictive” concept of stakeholders in order to establish a stronger link. According to Banerjee (2008), the logical result was a focus on stakeholders who can influence the financial or competitive position of the firm, leaving little or no resources directed to serve the interests of marginalized stakeholder groups. Reinforcing this perspective and relating with the notion of citizenship, Matten and Crane (2005) argue that an extended notion of Corporate Citizenship as the ones discussed in the above paragraphs, based on citizenship rights, enlarges the scope of potential constituencies to “citizens” in a broader sense. Furthermore, say Matten and Crane (2005), this broadened constituency should be analogous to those of governments, which are responsible to society as a whole and are linked to their constituencies by a shared territorial basis. However, a residual problem is that in the context of multinational corporations this is more complex, since there is no clear territorial delimitation.

When focus on stakeholders who can influence the financial or competitive position of the firm, Corporate Social Responsibility clearly becomes a strategy to wealth creation, in most cases designed to sustain a competitive advantage (McWilliams and Siegel, 2001). However, if Corporate Social Responsibility is indeed a competitive strategy, it is not a particularly valuable one in terms of not being imitable: the very visible nature of Corporate Social Responsibility practices makes it easier for competitors to develop similar strategies (McWilliams and Siegel, 2001). Corporate social responsibility in this framework is limited to win–win situations starting with the assumption that it makes good business sense and enhances shareholder value, argues Banerjee (2008). This implies that only few corporations are willing to consider improvements that require a substantially larger level of investment with a much longer time horizon than the immediate benefits of cost savings and efficiency increases. Secondly, it also implies that, for certain stakeholders, corporate social responsibility is a zero-sum situation with corporations serving the interests of the people who control corporations “at the expense of whomever does not” Banerjee (2008).
Summarizing, Corporate Social Responsibility has come in for increasing criticism, perhaps as a reflection of its growing influence on business life. The criticisms fall into four main areas (Blowfield and Murray, 2008):

- “CSR is anti-business”: Corporate Social Responsibility is an agenda imposed on business by society that damages profitability and, therefore business ability to generate wealth for society.
- “CSR is pro-business”: Corporate Social Responsibility is dominated by business, which is able to shape the agenda in its own narrow interests.
- “The scope of CSR is too narrow”: the current concerns of Corporate Social Responsibility are too narrow and leave out many key issues and stakeholders for which society expects business to take responsibility.
- “CSR fails to achieve its goals”: to date, Corporate Social Responsibility has failed to achieve its goals and needs to be more rigorous and innovative in the future.

It is generally accepted that Corporate Social Responsibility is about a particular set of business practices and strategies that deal with social issues, but for many people it is also about something more than that – namely a philosophy or set of values that underpins these practices. If it were just about what companies did in the social arena, it would not cause so much controversy as the debate about why they do it (Crane et al., 2008).

Indeed, the stance taken on the issues listed above is often informed by individuals’ responses to two questions: what is the purpose of business and what kind of societal issues can corporate policies rooted in self-regulation, public pressure and business self-interest adequately address? (Blowfield and Murray, 2008). If one thinks that the primary purpose of business is to make profit, then CSR will be criticized if it does not support it. But if one thinks that the purpose is its social function (e.g. producing useful, affordable goods), then CSR will be assessed on a different set of criteria. Similarly, those who see legislation as a barrier to competitiveness will look at CSR in terms of its capacity to remove regulatory burden (Banerjee, 2008), while those who are suspicious of market-based self-regulation will want to know whether CSR is a as rigorous and effective as are government interventions (Doane, 2005).
In terms of Corporate Social Responsibility as a discipline, there is no right or wrong answer to this type of debate. That the role of business in society is fundamental both to business and to the world at large seems to be irrefutable. And though there is no dominant critique as there is no common definition of what is the meaning of Corporate Social Responsibility, the points raised by criticisms are insightful, thought-provoking and, as such, deserved to be properly taken into consideration (Blowfield and Murray, 2008) in order to create a balanced and comprehensive overview of the field.

4.6.2. ON WORK-FAMILY LIFE

Regarding the work-family life debate, several authors have presented critical reflections on many aspects of such debate, mainly based on what they consider to be straight, sometimes simplistic, readings of empirical data and misconceptions about employee attitudes towards work and life.

In line with the literature reviewed in the previous chapter, Blyton and Jenkins (2012) draw attention to the fact that the discussion of the relationship between work and non-work life has tended to give preference to two aspects of that relationship over others. First, there has been a marked tendency to consider the impact of work on non-work life to a much greater extent than vice versa. Second, there has been an equal tendency to explore “work-life conflict” rather than examine possible positive associations within that relationship. Only during last decade, attention has been paid to growing evidence of work-life synergy and salutary effects of multiple-role involvement (e.g. Barnett and Hyde, 2001), paving the way to concepts such as “work-life enrichment” (Greenhaus and Powell, 2006, Carlson et al., 2006) defined as occurring when resources and experiences gained from one role improve role performance and quality of life in the other role.

In addition, quite often the work-life balance debate seems to be centred on a number of questionable assumptions and perceptions: that work is experienced as negative, with long working hours being perceived as the problem; that life can be equated with caring responsibilities, most particularly childcare, with the result that women are the primary target of work-life balance provisions; and that work and life are separable and in need of being separated. What some authors claim is that such negative and reductionist assumptions about work, life and work-life balance debate fail to capture more varied employee attitudes to and engagement with work and need to be interrogated and
critically analysed (Warhurst et al., 2008). For Blyton and Dastmalchian (2006), the conclusion is that the debate surrounding work-life balance has increasingly recognized the need to study the factors influencing lifestyle, or ways of living, within a broader context. Furthermore, Blyton and Dastmalchian point to a key issue in the work-life debate: the degree to which lifestyles, or ways of living, reflect choices motivated by personal values and preferences rather than economic, social, organizational or cultural constraints (Blyton and Dastmalchian, 2006). Ultimately, whether work-life balance is achieved can depend more on employee work attitudes than on employer work-life balance provisions.

Based on the assumption that work is bad and needs to be contained, working time became a prominent issue of the work-life balance debate and practices. And though the fact that work can have a debilitating effect on life is not new, the context and solutions to these perceived problems are indeed new (Warhurst et al., 2008).

In fact, regarding working time, firms tend not to shorten working hours but to provide employees with more flexibility in their working hours. Even in specific cases like the introduction of part-time work policies, Blyton and Jenkins (2012) alert us to the trap this policy can mean for some households as it leads to the accumulation of several jobs, thus working all hours, in order not to be caught in a poverty situation. Eikhof et al. (2007) reinforce the idea that employers have their own interest in flexible working hours so they can offer 24/7 services and so, ultimately, such work-life balance provisions are mainly means of fulfilling business needs. Concluding, flexibility needs being met tend to be those of employers rather than employees (Dastmalchian and Blyton, 2001).

Flexible working arrangements also have a common focus: workers, namely women, having caring responsibilities. Furthermore such work-life balance provisions are communicated as to help employees reconcile what they want to do (care) with what they have to do (work). Such a premise misses the fact that work itself can be an important potential source of life. The workplace can be a place of intellectual expression and personal achievement as opposed to the loving but intellectually blunt and socially under-appreciated arena of fulltime motherhood (Blyton and Dastmalchian, 2006). Under these circumstances, work can represent escape and self-expression. Eikhof et al. note (2007) that life is too readily equated with care responsibilities, and more precisely, with female care responsibilities. Whilst care commitments, and especially those of women, do
continue to be an important issue, it is essential to be aware of and overcome this particular understanding of life and the limits it imposes on the work-life balance debate.

Finally, while workers may feel pressured for time, neither lengthening working hours, nor long working hours are likely to be the sole or even main reason. The feeling of being caught in a time squeeze may rather result from, for instance, changed aspirations of lifestyles and consumption or gendered domestic labour arrangements. As Blunsdon et al. point out, none of these issues as been thoroughly researched within current work-life balance (Blunsdon et al., 2010). Concluding, these and other recent developments that challenge our concept of work, life and work-life boundary, including the changing locations of work, new forms of work and work intensification worth to be critically thought when designing new ways of working and the many facets of corresponding non-work life spheres (Warhurst et al., 2008).

4.7. CONCLUSION

Concluding, the previous chapter illustrated that work-family issues should be framed as an organizational issue, while this chapter states that the interface drawn previously can be grounded at Social Responsibility of the Corporation.

However, when the interface employer / employee / family or organization / person / family as an inner focus from the organizational point-of-view, is framed as business / person / society, these relationships, somehow, are exteriorized. For instance when firms implement some work-family life practices taking into consideration their employees and, through them, their families, one can say they are mainly focused on their internal responsibility or mission; while when they take some initiatives considering their social responsibility to the local community and to the families, which happen to be their employees’ families, they are mainly addressing their external social responsibility.

The previous chapter finished with the research question: does the way in which work-family life policies are framed and introduced by an organization influence how employees perceive and use them? At the end of this chapter, it is argued that one possible way for the organization to frame such theme is through corporate social responsibility. So the question can be re-written as:
• does the way in which CSR is understood and driven by an organization, namely in its internal component, influence how employees perceive and use work-family life policies?

• If that is so, should external and internal social responsibilities be aligned and consistent with each other? What if they are not?

• Will the perceptions of employees regarding the extent to which their organization is family-supportive become contaminated and will they become sceptical?

A conceptual framework that, ultimately, will serve to shed light on such questions will be set up.
CHAPTER 5. METHODOLOGY

5.1. INTRODUCTION

The literature reviewed in the chapter related to Work-Family Life (WFL) (CHAPTER 3) illustrated that the interface between work life and family life terrains are normally framed as an internal organizational issue focusing on the employee. The literature reviewed in the last chapter (CHAPTER 4) questioned and discussed whether such interface should be grounded as a Social Responsibility of the Corporation.

Thus, from the literature reviewed in the previous two chapters and the rationale presented, specific research questions have been formulated:

- Is the convergence/divergence of perception of the corporation and employees on each organization related to the way company’s work-family policies and initiatives are framed?

- If so, should Corporate Social Responsibility strategy be aligned and integrated with Work-Family life strategy & policies, in order to promote a consistent corporate mission towards society? What if they aren’t?

The result of formulating research questions is that it helps to circumscribe a specific area of a more or less complex field (Flick, 2009). Indeed, the interface between business and society can be approached from a multitude of aspects, namely, for example, from the perspective of the employees’ family. In addition, not only it is important to define the domain and the research questions but also it is crucial that they are answered through available resources and an adequate research design.

In this chapter, the methodological framework used on the research will be defined. Also, the research strategy, research methods and research design will be presented. The reasons to choose this strategy and design over other approaches will be explained while discussing their advantages and disadvantages.

5.2. RESEARCH STRATEGY

The research will basically follow an inductive approach due to the lack of literature linking work-family life studies and the external social responsibility of firms. This
suggests a missing link which is expressed in the research questions stated above. Though the existence of such link could be seen as the hypothesis of the research, its content will be inferred from the research. Thus, a more interpretative and less quantitative (Cassell and Symon, 1994) stance is more adequate as conclusions, by induction and inference from a basis of empirical observation, will be the outcome of the research. Though the approach is not a pure grounded one, conclusions will be generated through fieldwork in close relation to the phenomena to be explained (Thomas, 2004, Flick, 2009).

A deductive approach generally means that the researcher, taken into account the existent theoretical considerations in relation to the chosen domain, formulates a hypothesis. That deduced hypothesis must then be subject to empirical research, to the process of data and fact findings and analysis that will confirm or reject the initial hypothesis. The inductive approach infers from the collected data and fact findings for the subjacent theory that relies and illuminates the research (e.g. Bryman and Bell, 2007, Thomas, 2004, Flick, 2009).

Considering the extensive theory and empirical studies that have been being produced either in the area of work-family interface or in the area of CSR, recent studies aim to cover weaknesses in the literature (e.g. WFL - Behson, 2002b), to formulate different theories and refine interpretations on the work-family interface, (e.g. WFL - Scandura and Lankau, 1997) and its relationship with other theories, (e.g. WFL - Arthur and Cook, 2004). As a result, the majority of the research in this area follows a deductive strategy, in the sense that it is strongly supported in existent theory and that stated preliminary hypotheses inform the data collection and analysis (Bryman and Bell, 2007, Thomas, 2004).

However, it is also common to come across some inductive approaches, due to the novelty of a very specific domain (e.g. WFL - Goff et al., 1990) or the relevance of some unexpected or contradictory observations (e.g. WFL - Grover and Crooker, 1995).

This interpretative approach assumes that theory is created from the point of view of the individuals who live and work in a particular culture and organization (Saunders et al., 2007). The aim is that the results from the research should provide a plausible understanding of the phenomena under study taking as a starting point the world as it is seen from people going about in their everyday role and job.
In most of these studies the research and the analysis is not context-free (Creswell, 1994), also in this research, and, thus, it could present problems of generalization to other populations. In fact, whereas there is a considerable consensus about assessment criteria for research within a positivist framework there is far more debate about what makes a good research within alternatives approaches more interpretivists like the chosen inductive-qualitative approach (Cassell et al., 2006). In contrast to positivism, reality is interpreted and analyzed through the eyes of all the actors engaged on the research and one should be aware of this subjectivity. Likewise, in some situations, reality will be highly situational, because of the dynamics of individuals and organization.

Therefore, normally, it would need further data in order to establish the conditions in which theoretical conclusions were applicable. However, in inductive approaches, findings are to be generalized to theory rather than to populations (Mitchell, 1983).

**5.3. RESEARCH METHODS**

**5.3.1. INTRODUCTION**

This research, though basically qualitative, will combine quantitative (functionalist-positivist) and qualitative (critical-interpretative) methods in a multiparadigm research approach, triangulating findings from the Human Resources managers and the employees’ perspectives collected through a survey, with in-depth semi-structured interviews with managers and employees from the participating institutions.

Quantitative research emphasizes quantification in the collection and analysis of data and hence normally entails a deductive approach to the relationship between theory and research, as it is well suited for testing of hypothesis and theories. While a more qualitative approach emphasizes words and social concepts rather than quantification and thus entails an inductive approach to the relationship between theory and research, in which the emphasis is placed on generation of theories through findings while researching (Bryman and Bell, 2007).

The presented quantitative/deductive approach versus qualitative/inductive approach is not definitive and alternative examples combining both can be found in literature (e.g. Hofstede, 1984). Organizational research debate, currently, is less quantitative versus
qualitative and more how research practices lie somewhere in a continuum between the two (Newman and Benz, 1998).

Furthermore, like all other fields of research, organizational studies are paradigmatically anchored. A paradigm is a general perspective or way of thinking that reflects fundamental beliefs and assumptions about the nature of organizations (Gioia and Pitre, 1990). However, a multiparadigm approach to theory building as a means of establishing correspondence between different paradigms and theory-construction efforts aid exploration of particularly complex and paradoxical phenomena by helping theorists employ disparate theoretical perspectives (Lewis and Grimes, 1999). This research will encompass two parallel studies in a multiparadigm environment. In fact, in multiparadigm research, scholars conducting parallel studies use multiple paradigms (their respective methods and focus) to collect and analyze data and to cultivate varied representations of a complex phenomenon (Hassard, 1991).

5.3.2. SURVEY

An initial survey was carried out aiming to outline family-friendly policies and initiatives as well as to characterize the work-family culture, focusing on the three dimensions described in the relevant literature, from the organization and employees viewpoint.

The use of a quantitative approach, normally surveys, has been applied, recurrently, when studying work-personal/family life interface in general or any of its specific characteristics or relationships between them (e.g. Sanik, 1993, Greenglass et al., 1988, Burke, 1988, Higgins et al., 1992, Thomas and Ganster, 1995, Carlson and Perrew, 1999).

Quantitative approach is, not only well suited for testing theories (Bryman and Bell, 2007) but it is also a simple, accessible and well-timed way of capturing and measuring reliable and valid data from a population, fairly large and dispersed such is the work-force of the various firms in order to compare indicators between firms (May, 2006). These indicators, in the case of this research, are, for example, the gap between the differing perceptions of the existence and accessibility of work-family life policies and of a family-supportive environment, from the organization and the employees.

Surveys only reflect snapshots as their results have a static dimension. But if the survey has an appropriate sample size and a correct structure, the obtained findings can be
considered as valid ones and generalization is possible to a certain extension (Bryman and Bell, 2007). According to the literature, a random sample was assumed to be adequate (Sekaran, 2003) and the minimum size required for the sample was 100 observations per Organisation (Easterby-Smith et al., 2002).

5.3.3. SEMI-STRUCTURED IN-DEPTH INTERVIEWS

Also some semi-structured in-depth interviews with CEO/HR/CSR managers of the participating firms were conducted aiming to understand the institutional framework for CSR and work-life issues within the organization.

Finally a set of semi-structured in-depth interviews with line managers and employees from the participating firms were done aiming to understand their perception on the value of work-life policies, on the organizational environment as being family-supportive and on the frame and organizational drivers in what concerns work-life and CSR initiatives.

The number of firms and the number of individuals per Organisation was based on the concept of theoretical sampling, namely on the criterion of theoretical saturation (Strauss and Corbin, 1990). According to this criterion, the researcher will know when a given search has ended, when no additional data can be found that illuminate the analysis and so, by definition, no sample size is defined in advance (Flick, 2009).

However, taking into consideration the literature, which suggests that after three or four data units have been analyzed, the majority of useful concepts has been discovered (Martin and Turner, 1986), the research plan included a minimum of four interviews per organization and a minimum of four firms.

Above all, interview after interview, knowledge is received while taking gradually an insider’s perspective (Flick, 2009), in order to understand as far as possible the individual’s viewpoint and the organizational principles from his/her own perspective.

Conclusions were built up through comparative analysis of the firms and identifying differences and similarities between them (Glaser and Strauss, 1967).
5.3.4. TRIANGULATION

These multiple perspectives from different stakeholders and multiple data from the same stakeholders are necessary to fully understand the phenomena and the nature of the links under study as well as for cross-checking the consistency (or inconsistency) of the findings (Flick, 2009).

As Flick (2009) explains there are two ways of responding to different perspectives of research. First, rivalry of paradigms, one can adopt a single position or multiple different positions, formalize them into paradigms and juxtapose them in terms of competing paradigms.

Alternatively, one can understand different theoretical or methodological perspectives as different ways of accessing the phenomenon under research (Flick, 2004). Any perspective will then contribute to illuminate part of the phenomenon supplementing each other in order to provide an enriched vision of it.

Actually, triangulation of data by multi-method approaches is a good practice in organizational research, where the kernel of it is about very complex processes involving different actors (Cassell and Symon, 1994). In this research, the triangulation of data will also permit the combination of accurate quantitative data with the ability to interpret the idiosyncrasies and complex perceptions, provided by the qualitative analysis (Zamanou and Glaser, 1994). According to Denzin (1989), the used triangulation is considered to be a methodological triangulation.

Concluding, the triangulation of perspectives (organization and employees), meaning different ways of accessing the phenomenon under study, furthers knowledge enrichment and increases depth and consistency in methodological proceedings (Flick, 2009).

5.3.5. OTHER METHODS

Qualitative research, used in interviewing, seems to be the appropriate for this research as it is focused in the finding of relationships and factors. Many of the relationships within the organization are informally established and thus difficult to capture with less flexible and open quantitative methods, as for example in the case of the studies made on the fit of Human Resources management with Organizational performance (Truss, 2001).
In fact, qualitative methods seemed to be quite appropriate to research focusing on organizational processes and to understand and interpret both individual and group experiences of work, (Creswell, 1994, Bryman and Bell, 2007) because of its characteristics comparatively to quantitative methods. Six major facets of these methods (Cassell and Symon, 1994) can be pointed out as they are fully applicable to this research.

The first difference, and most superficial, is that qualitative methods do not involve the quantification, rather the interpretation, of the phenomena. Social concepts, such as commitment, willingness to stay or job-satisfaction are difficult to measure and count (Bulmer, 1984).

Second, qualitative methods are less driven by specific and restrictive a priori hypotheses, more open to emergent issues and concerned with the participants’ view of the phenomena, while accepting the inherent subjectivity of the research. The attitude of seeing through the eyes of the people and organizations studied, which is a main preoccupation of qualitative researchers (Lofland and Lofland, 1995), is a fundamental characteristic of this research. Further, researchers are more engaged with participants and these are proactive in defining the key issues making the process more accessible and transparent to them.

Also, qualitative methods are more flexible, allowing redefinition and adjustments of the researcher’s intervention either in response to emerging insights and hypotheses or to changes in organizational circumstances, for example access to people or data, during the process of research.

Moreover, qualitative methods are more sensitive to the organizational life under research. They are more able to capture and encompass that dynamism. Further they seek to provide a holistic view of the organization, its context and behaviour of different stakeholders, contrary to a static and reductive cause-effect links finding (Silverman, 2004).

Concerning the used techniques, the use of qualitative interviews aims to see research topic through the perspective of the interviewees and to understand how and why they have this particular perspective (King, 2004), in this case, for example whether CSR is aligned with work-family strategies. Using in-depth semi-structured interviews allowed to
ask the same issues, the same way each time while investigating unexpected issues and to elicit meanings and findings. It is also a suitable technique to address managers where access is difficult and time limited.

Why not using other well-suited methods? Other approaches like for instance, a Case Study approach would, in principle, be also quite adequate for this research as it has been widely used to theorize on culture and organizations (Robson, 2002) and case studies also allow the interpretation and analysis of complexities of processes (Hartley, 2004). However, doing a case study would require a much longer and wider presence within the organization (Hartley, 2004). Not gaining and maintaining that kind of access would mean a major risk to the research and, in this actual case, it had a high probability of occurrence.

Another important argument was that the number of firms to be studied must be sufficiently large in order to analyse different CSR approaches and this constraint was difficult to be accomplished, on time, through the comparative case study methodology (Flick, 2009). Thus, not adding a significant value to this particular research, this option was discarded.

5.4. RESEARCH DESIGN

5.4.1. CONCEPTUAL FRAMEWORK

Research design is defined (Easterby-Smith et al., 2002, page 21) as “the overall configuration of a piece of research: what kind of evidence is gathered, from where, and how such evidence is interpreted in order to provide good answers to the basic research question[s]”. With that mind, a conceptual model was built up to guide the collection and analysis of data.

The model includes two major domains: work-family life and corporate social responsibility. A third research domain named mission was added. Indeed, firms state their viewpoint on the role of the firm regarding business and society, as a corporate social responsibility issue. However, occasionally, firms define their own role in business and society as its mission. Moreover, some of them split the mission statement in two perspectives: an internal mission, considering, mainly, their employees and an external mission, considering, in general, all other stakeholders, namely their employee’ families.
As in such cases, work-family life policies are taken into account in both contexts, such a distinction was considered in the frame.

That same distinction was made in the social responsibility domain, in order to investigate whether policies regarding the employees or their families are framed as social issues or internal people management issues and the way it affects (or not) the perception of the employees regarding organizational supportiveness.

Finally, the alternatives for portraying the relationship between such domains using the most popular models - pyramid, intersecting and concentric shapes – were considered. Though, all these models intend to emphasize that there are distinct components that, taken together, constitute a whole, they are different in the assumption of the relationship between the different domains. While the pyramid and concentric shapes explore a hierarchical relation with an embedded order, intersecting shapes illustrate the interpenetrating characteristic of the relations between the different domains. The idea of representing the framework presented in Figure 7 was to highlight the alignment between the different domains and the comprehensive relationship between them that is the hypothesis of the research.

![Figure 7 – Conceptual framework](image)

**5.4.2. VARIABLES OF ANALYSIS**

Two major components characterize a family-supportive work environment in an organization (Thomas and Ganster, 1995, Allen, 2001): family-supportive policies and
family-supportive culture. Both components measure organizational efforts to support employee needs to balance work and family responsibilities.

Formal family-supportive policies and benefit packages take many forms, but can generally be grouped into job flexibility policies and support, benefits and services packages. One type of job flexibility policy is the offering of alternative work arrangements that include flexible time, telecommuting or job sharing. The second type of support, benefits and services packages, may include a host of supports, such as dependent care referral services, on-site daycare (e.g. Taylor et al., 2009), or even a fitness centre and professional counselling (e.g. Lambert, 2000). Some policies, for example, paid parental leave (e.g. Lambert, 2000), are difficult to categorize as they can be seen as a job flexibility policy or a benefit.

The literature suggests that there are at least three possible components of family-supportive culture or work–family culture as defined by Thompson et al. (1999):

- time demands or expectations on how employees prioritize their work and family commitments;
- perceived negative career consequences associated with utilizing work–family benefits or devoting time to family responsibilities and
- managerial support and sensitivity to employees’ family responsibilities.

When characterizing a family-supportive work environment, in addition to work-family culture, it is crucial to examine the employees’ perceptions regarding the extent their organization is family-supportive (Allen, 2001).

More global measures of organizational supportiveness, in the sense that they are not restricted to the work–family life domain, are also related to a similar and overlapping set of employee outcomes (Behson, 2002b, Allen, 2001). The commonly used organizational context measures are:

- perceived organizational support
- perceived fair interpersonal treatment
- trust in management

In what concerns the Corporate Social Responsibility, the aim is to understand the organizational approach and categorize it in order to compare it with others. For this
purpose the classification stated by Garriga and Melé (Garriga and Mele, 2004) that divides CSR approaches in four groups according to the way the corporation sees its role in the relationship between business and society will be used:

- Instrumental
- Political
- Integrative
- Ethical

5.4.3. PARTICIPATING FIRMS

The research design is based on a Portuguese cross-sectional study based on a sample of Portuguese medium-large firms.

Several reasons contribute to the choice of a cross-sectional design. First, it is important to study different kinds of firms (geographically, economic activity, dimension, ownership, etc) to outline the variation of concepts and indicators and analyze patterns of association between variables and concepts.

Also, other research designs such as the longitudinal one would not be adequate as this is typically used to study change or evolution of phenomena through time (Pettigrew, 1990a). Time is a structuring variable of those researches with data being collected on at least two occasions. In this case, time can be an attribute as each analysed situation is dated, but it is not a variable. Each type of data is collected, more or less simultaneously, at a single point in time.

The rationale for considering a national cross-sectional sample of Portuguese established firms are its originality, the accessibility to data sources (people and organizations) and the fact that work-personal/family life policies and social responsibility strategies are primarily social and cultural grounds. According to Lyness and Kropf (Lyness and Kropf, 2005), national context is relevant to work–family issues, primarily, because employees’ work–family balance can be supported by national policies and programmes such as, for example, those to support men and women’s development and achievements in all aspects of life. Secondly, the national context is relevant because of the cultural roles expected from men and women, either at work or in the family, for example fathers’ role in childcare (Haar, 2009). Powell et al. (2009) examined the culture-sensitivity of work–
family balance theories, namely the ability of Western theories of work-life balance to be
generalised to non-Western cultures. These researchers have, for example, identified that
the relationships between work–family conflict, job satisfaction and turnover intentions
are stronger among workers employed within Anglo countries (Australia, Canada, New
Zealand, UK and the US) than for workers employed within Asia, Latin America and
Eastern Europe (Spector et al., 2004, Spector et al., 2007) and that this implied that within
individualistic societies displaying dissatisfaction and leaving employment is generally
considered to be culturally acceptable, whilst within collectivist cultures loyalty to an
employer is a strong cultural norm irrespective of individual levels of dissatisfaction.

Though Portuguese governmental family-friendly policies have been recently studied and
analyzed (OECD, 2004), the initiatives introduced by many organisations to assist
employees to balance their work and family responsibilities and their effectiveness were
not systemically researched. Additionally, being work-personal/family life policies and
social responsibility strategies issues with a significant cultural component (Tanaka,
2005), it is not prudent to extrapolate studies and results from other countries to the
Portuguese context.

The sample is a theoretical sampling which is recommended for inductive approaches
(Denzin, 1989). In theoretical sampling, the selection of the cases is purposive to
highlight theoretical issues and to foster theoretical challenges (Pettigrew, 1990a).

Hence, the sample of firms had to contain a set of firms from different categories
(economic activity, employment size, etc), medium-to-large (more than 250 employees,
according to the “staff headcount criterion” (2003/361/EC, 2003)), and featuring
initiatives to support employees to balance their work and family responsibilities. These
requirements were intended to assure that there was sufficient diversity of practices and
contexts, scale and relevant material.

The idea behind choosing medium-to-large firms was that, though they do not fully
represent the Portuguese economic tissue (they represent 0.08% of the firms operating in
Portugal as 95.41% of the Portuguese firms have up to 9 employees (INE, 2011)), they
give a major contribution to the national economy (they hold 32% of total turnover
achieved by the Portuguese firms (INE, 2011)) and they are socially relevant as they
employ a significant percentage of the Portuguese labour force (they employ 21% of the
employed labour force (INE, 2011)).
Another important reason is that they are leaders and innovators regarding family-friendly and other social organizational initiatives. Normally, these firms are early-adopters and so the study, by focusing on medium-to-large firms, could profit from learning with the best practices in Portugal.

According to these requirements, a range of fifty firms were approached, through personal, phone and email contact, explaining the purpose of the research and its relevance. From the twenty-nine responses received (response rate of 58%), a final set of twelve firms was defined. They were further aggregated into four clusters grouped by economic activity: Banking and Financial Services, Wholesale and Retail, Transport and Utilities Services, as presented in Table 7.

The twelve participating firms were chosen because they met the requirements previously defined, were available to get involved in the whole research and, altogether, provided a balanced representation of the different economic sectors.

<table>
<thead>
<tr>
<th>Economic Cluster</th>
<th>Firm Id</th>
<th>Economic Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Banking and financial services</td>
<td>BK1</td>
<td>Banking and financial services</td>
</tr>
<tr>
<td></td>
<td>BK2</td>
<td>Banking and financial services</td>
</tr>
<tr>
<td></td>
<td>BK3</td>
<td>Banking and financial services</td>
</tr>
<tr>
<td>Wholesale and Retail</td>
<td>RT1</td>
<td>Food Distribution and Manufacturing</td>
</tr>
<tr>
<td></td>
<td>RT2</td>
<td>Convenient snacks, foods and beverages</td>
</tr>
<tr>
<td></td>
<td>RT3</td>
<td>Home furnishing products</td>
</tr>
<tr>
<td>Transport</td>
<td>TR1</td>
<td>Passengers Public transport</td>
</tr>
<tr>
<td></td>
<td>TR2</td>
<td>Passengers Public Rail services</td>
</tr>
<tr>
<td></td>
<td>TR3</td>
<td>Air operator</td>
</tr>
<tr>
<td>Utilities</td>
<td>UT1</td>
<td>Tolled motorway operator</td>
</tr>
<tr>
<td></td>
<td>UT2</td>
<td>Energy - generation, distribution and trading</td>
</tr>
<tr>
<td></td>
<td>UT3</td>
<td>Telecommunications operator</td>
</tr>
</tbody>
</table>

Table 7 – Participating Firms
5.4.4. SURVEY

5.4.4.1. DESIGN

The base survey is divided into two groups emphasizing the fact that the implementation of formal policies is necessary but not enough to achieve results. The process of work-family policies implementation needs to be supported by the presence of a work-family culture (e.g. Brough and Kalliath, 2009, Thompson et al., 1999).

The base survey includes 2 components:

- **Work-Family life Policies**
  
  It measures the availability and the degree of formalization of various work-family institutional policies, including work arrangements, support, benefits and services (e.g. Taylor et al., 2009, Lambert, 2000).

  While some authors have argued that the total number of supports may not be an ideal measure (e.g. Allen, 2001, Thompson et al., 1999) due to the perception that employees may be penalized for using these supports, the bulk of the literature finds that even offering supports (regardless of usage) can have positive effects on the organization and the individual employee (Arthur and Cook, 2004). Following this logic, the total number of supports available was used as a measure of the availability of formal work-family policies.

- **Work-Family Culture**
  
  It recognizes the existence or absence of practices that usually obstruct or promote advance towards a family-supportive culture, in three main dimensions, according to Thompson et al. (1999):

  - time demands or expectations on how employees prioritize their work and family commitments;
  - perceived negative career consequences associated with utilizing work–family benefits or devoting time to family responsibilities and
  - managerial support and sensitivity to employees’ family responsibilities.
The components were measured with 2 scales, as shown in Figure 8:

![Figure 8 – Base survey](image)

- **WFP – Work-Family Policies Scale**
  The work-family life policies scale is composed of 31 questions (see Appendix A. Survey), each one related with one policy.
  
  The questions are subdivided into two groups according to the variables of analysis previously defined (see paragraph 5.4.2). Hence, the first group includes 14 questions related with job flexibility policies and the second group is composed of 17 questions related with support, benefits and services packages.
  
  Each answer measures the availability (or the perception of such availability) of that specific policy within the firm, according to the four-point rating-scale from 0-Not Available to 3-Available to All Employees.

- **WFC – Work-Family Culture Scale**
  The Work-Family Culture Scale is composed of 8 questions (see Appendix A. Survey), each one reflecting one practice that can be a promoter (3 questions), a hindrance (3 questions) or a managerial attitude (2 questions) towards a supportive work-family culture. Promoters and hindrances questions were adapted from a study by Kossek about sharing concerns and caregiving decisions (Kossek et al.,
2001) while managerial attitude questions were used, among others, by Lambert (2000) in a study between work-life benefits and organizational citizenship behavior.

Each question, as shown in Figure 9, contributes to characterization of one dimension of the family-supportive culture according to the variables of analysis previously defined (see paragraph 5.4.2):

- **TM** – Time demands and expectations,
- **NC** – Negative career consequences and
- **MS** – Managerial support.

**Hindrances**

- **C1** Employees are expected to take work home
- **C2** Rejecting a promotion or transfer for family reasons might affect an employee’s career in your company
- **C3** An employee that benefits from a leave of absence or a reduction in hours for family reasons is judged as being less committed to the company

**Promoters**

- **C4** Employees are encouraged to go home after a certain time of day
- **C5** Decisions in the HR department take an employee’s family/personal situation into account
- **C6** Executives are understanding when employees put their families first

**Managerial attitudes**

- **C7** Managers/supervisors are sensitive to the importance of the work/family balance
- **C8** Managers/supervisors are an example of family-responsible behavior

Figure 9 – Work-family culture questions and dimensions

Each answer measures the perception of the respondent, according to a four-point rating-scale as described in Appendix A. Survey.

A scale is only as good as the information that goes in it and to examine the quality of this information it is frequent to use reliability tests. The key is that the used information contributes with consistent information. Thus it is also known as internal consistency of the scale. One of the most commonly used tools to assess reliability is Cronbach’s alpha coefficient (Cronbach, 1951). This coefficient is based on the average correlation of items within the scale. Naturally, it is assumed that there is a positive correlation between the scale items since they are all intended to be contributing to the understanding of the same phenomenon. As a general rule of thumb, scales with reliability coefficients less than 0.6
should be reconsidered and, with a reliability coefficient above 0.8, the scale is quite reliable and it can be used with confidence.

There are a number of ways in which Cronbach’s alpha coefficient can be interpreted but, most importantly, it is a good tool to assess basic attributes of the scale: the overall usefulness of the scale in capturing the intended phenomenon and the contribution of each scale item in the overall reliability of the scale.

In what concerns the latter, Cronbach’s alpha examines each item contribution to the scale by providing an alpha coefficient for the scale if that item was deleted. If there are elements of the scale that contribute with identical, confounding or non-adding value information, these items can be considered superfluous and its inclusion only serves to reduce the power of the scale. In principle, if the overall reliability of the scale improves with the deletion of such items, then they should be deleted unless theoretical or empirical evidence suggests otherwise (Cronbach, 1951).

In the case of the two scales defined above (work-family policies and work-family culture), the former presented a Cronbach’s alpha coefficient of 0.9022 (based on firms data) and 0.9163 (based on staff data) and the latter presented a coefficient of 0.8475 (based on firms data) and 0.8699 (based on staff data). These values suggest that both scales are quite reliable.

Two notes are worth to be added. First, it is normal that the coefficient regarding the work-family culture scale should be lower as there are drivers positively correlated (cultural facilitators) and some negatively correlated (cultural hindrances). Secondly, two policies were suggested to be dropped as they were available in all firms for all workers (p27-accident insurance and p31-lunch subsidy) as, in Portugal, these benefits are mandatory by law. However, though they did not add significant information and the scale would perform better if these items were excluded, they were left because they did not significantly deteriorate the scale and the scale could be compliant to other studies in this area (e.g. Lambert, 2000, Parker and Allen, 2001, Lewis and Taylor, 1996).
The firm’s survey, see Figure 10, was extended with some demographic questions in order to provide a brief characterization of the organization, namely the size (total and in Portugal), the ownership (private or public), the economic sector, the percentage of women in staff, the percentage of women in management, the percentage of non-permanent labour contracts, the attrition rate and the percentage of absenteeism (see Appendix A. Survey).

![Figure 10 – Firm’s survey](image)

For the same reason, the employee’s survey, see Figure 11, was also extended with some demographic questions in order to provide a brief characterization of the individual and his family life, namely the gender, age, marital status, number of children, age of the youngest person living at home or dependant, working partial or full-time and spouse working partial or full-time (see Appendix A. Survey).

![Figure 11 – Staff's survey](image)

### 5.4.4.2. IMPLEMENTATION

Prior to the implementation of the survey, it was necessary to choose the adequate technological infrastructure, to produce the electronic version of both surveys (firm and
employee) and finally to set-up the web page to allocate the surveys. Electronic versions of each survey were available in a dedicated web-page accessible from the beginning of April until late August 2010.

The use of an electronic version proved to be very useful, not only because it considerably increased the number of valid answers but also because, while answering directly to an external website, the confidentiality of the gathered data was assured, namely in what concerns data from the employees with respect to the firm they work for (Hardré et al., 2007). Furthermore, the use of a web data gathering system allowed data to be directly saved in a Microsoft Excel® sheet.

As for some groups of workers in certain firms, the access through the internet was not convenient, a paper version, similar to the electronic, was distributed. Answers were returned in individual closed envelopes so confidentiality could be guaranteed.

The firm’s survey was answered by the Human Resources Manager who, in all the cases, was also a Member of the Board.

The Human Resources Manager from each firm invited every employee to answer voluntarily, explaining the purpose of the study and stating that data was anonymous and confidential and that the firm would only have access to the consolidated results. The message was communicated using different means of communication: some Managers posted a message on the intranet with a link to the external website where the survey could be answered, others sent an internal email message to all employees and others included a message in the internal newsletter. The distribution of the paper version of the surveys was made through the line managers and supervisors who were personally contacted by the Human Resources Manager. In general the message was effective as the answers from the employees came in a short-time.

The minimum size required for the sample was established to be, as previously noted, 100 observations per Organisation (Easterby-Smith et al., 2002), with the number of valid answers exceeding the expectations (total number of valid answers = 2472), see Table 8.
Table 8 – Survey - Number of valid answers per firm

As said, all data was gathered in Microsoft Excel® sheets. These data files were further exported and treated using Stata® v10.1 statistics data analysis software package. The presented findings and analysis are based in both software packages.

Based on the collected data, the perception gap (convergence / divergence) between the firm’s and employees’ perspectives was calculated, the different work-family organizational cultures were compared and some relationships between the findings were analysed. Descriptive statistics, internal consistency reliability estimates and intercorrelations for the scales were further analysed. Finally a factor analysis of work-family life policies and culture suggested that these are multidimensional constructs.

5.4.5. INTERVIEWS

5.4.5.1. DESIGN

The design of the interviews was based on the introduction of relevant topical areas, the purposive formulation of different types of questions and the construction of the interview guide. In fact two interview guides slightly different were adopted - one for the HR managers and another for the employees – in order to better capture the differing perspectives (see Appendix B. Interview guide).

The 3 key areas to gain insight were based on the themes identified in the literature as possible variables of analysis and valuable for further investigation:

- Work-Family Culture
  It recognizes the existence or absence of the practices that usually obstruct or promote advance towards a work-family culture, in three main dimensions (Thompson et al., 1999):
  - time demands or expectations on how employees prioritize their work and family commitments;
  - perceived negative career consequences associated with utilizing work–family benefits or devoting time to family responsibilities and
  - managerial support and sensitivity to employees’ family responsibilities,

Page 142
• **Family-Supportive Organizational Context**

  It examines the employees’ perceptions regarding the extent their organization is family-supportive (Allen, 2001). In fact, these measures are global measures of organizational supportiveness, in the sense that they are not restricted to the work–family life domain, but are also related to a similar and overlapping set of employee outcomes:

  - perceived organizational support
  - perceived fair interpersonal treatment
  - trust in management

• **Corporate Social Responsibility approach**

  In what concerns the Corporate Social Responsibility, the aim is to understand the organizational approach and categorize it in order to compare with others. Where possible, the Garriga and Melé (Garriga and Mele, 2004) categorization was used.

  It is worth note that only the first of these themes – Work-Family Culture - was covered by the survey. The reason for that is that surveys are adequate to capture general characteristics, for example, work-family policies in an institution, while interviews, on the other hand, are well suited to capture individual beliefs, behaviours and perceptions which are related to assumptions that cannot be recognized in a survey (e.g. Cassell et al., 2006, King, 2004, Bryman and Bell, 2007).

  Indeed, in-depth semi-structured interviews were chosen because the nature of this research is what could be considered a reconstruction of subjective theory (Groeben, 1990). Subjective theory refers to the fact that the interviewees have a complex stock of knowledge about the topic under study (Flick, 2009). This knowledge includes explicit and implicit assumptions and that is why interviews must be supported by different types of questions.

  Each topic was normally introduced by an open question (e.g. “What do you think about companies introducing work-family life benefits in general?” Or “What do you think about companies involved in social responsibility initiatives?”). These questions, in an interview, are normally answered on the basis of the immediate knowledge that the interviewee has at hand and thus it normally uncovers people’s beliefs about such themes. Also it enabled the interviewees to elaborate on aspects relevant to them whether they
were already covered in the interview guide. Keeping this openness and avoiding to apply the guide too bureaucratically (Flick, 2009) in order to get deeper in some foreseen concepts and to discover new ones was an attitude present in all interviews.

Additionally, these open questions were balanced with theory-driven questions directly related to the research questions (e.g. “Is it possible to access work-family life benefits without the support of your manager? What about the support of your team?” or “Why do you think your company is involved in social responsibility initiatives? What are the drivers?”)

Finally, some confrontational questions were posed in order to stress and re-examine some of the interviewee’s statements. For example, if the interviewee says that CSR, in its company, is a question of corporate citizenship, he/she can be asked “Are you saying it is not a mean to the ultimate end of profit and wealth creation?”.

For the construction of the interview script, some key points were taken into consideration. They helped to structure the interview script and to formulate the questions. These key points were (Flick, 2009):

- Why is that specific question asked? What is the link to the research questions?
- For what reason is that question asked? What is the relevant dimension of it?
- Why is that question formulated this way? Is it easy to understand, unambiguous and productive?
- Why is that question positioned at that specific place in the interview guide? Does it fit in the structure of the guide? How is the distribution of types of questions spread across the guide?

Though each interview did not follow the script precisely, it was quite helpful to develop one as it allowed the conversation to focus on foremost topics of research while leaving space for revealing adjacent themes (e.g. recession scenario and its consequences).

5.4.5.2. PARTICIPATING EMPLOYEES

Taking into consideration the literature, according to which after three or four data units have been analyzed, the majority of useful concepts has been discovered (Martin and Turner, 1986), a set of five interviews per organization was planned.
A sample of five to ten employees willing to be interviewed was set up by the Human Resources manager, which was the contact person for the research in each of the firms. Though the selection was mainly prepared by the Human Resources manager, the following inclusion criteria had to be met before the employees could be approached as potential interviewees:

- They had to be representative of the diversity of workforce including male / female, married / other marital-status, with / without dependants.

- They had to be representative of various functions (e.g. line managers, supervisors, co-workers), jobs (e.g. operations, administrative, front-office, logistic, commercial) and work arrangement organization (e.g. full-time, part-time, shift work).

- They do not have to be using Work-Family Life flexibility arrangements or other benefits.

- They had to be permanent employees and not temporary workers, preferably, with a certain number of years of work in the firm.

These criteria were defined in order to obtain a clear idea of the mission, the values, the policies and the culture of the firm and to identify what distinguished each firm from the others. Line managers and supervisors are a good choice not only because their privileged position between the top management and the bottom-line workers enables them to have a wide and integrated perspective of the organization, but also because of their own experience as both managers and workers.

It was also communicated to the employees that the scope of the interview was about issues related to the internal social policies, social responsibility in general and, from his/her perspective, the approach of the firm to such subjects.

Though in order to receive fruitful insights interviewees should not be familiar with the researcher (Flick, 2009), it is also recognized that a potential way of gaining further knowledge is for the researcher to take, at least temporarily, an outsider attitude questioning what seem to be evidences and routines taken for granted by people in the firm. But, while an outsider, certain aspects of the reality remain hidden and are not disclosed. These aspects will only be accessible and will only be understood from inside...
from their own logic. One possibility is to gradually take an insider’s perspective, gaining proximity throughout the work in the institution.

Another possibility is to seek a good equilibrium between stranger and familiar interviewees, aiming for an adequate proximity and distance balance that will promote the learning of that particular social group (Flick, 2009). According to this rationale, not all interviewed employees were selected by the Human Resources manager as some of them were direct (or indirect) personal contacts. These “out of the set” employees turn out to be very important as they detailed and explained perceptions and, to a certain extent, validated the findings of the research.

Also, this triangulation of sources of knowledge (a chosen set of insiders and an outsider) was very useful in mitigating particular problems of censorship (Guba and Lincoln, 1994). Moreover, by confronting diverse sources of data and informants, it was possible to have a more reliable and holistic understanding of the social reality of each firm.

5.4.5.3. IMPLEMENTATION

Following a linear model of research design (Flick, 2009), after the survey was answered, the interviews with the Human Resources managers from all the firms were conducted. Only after that, the interviews with the employees took place. The idea was to systematically structure and deepen the knowledge about the institutions and the research topics. Though some flexibility towards data and information may have been lost, it was probably the best way to maintain focused during the different steps of the field work while trying to achieve a consistent interleaving of collection and analyzing of data.

During the period of interviewing the employees, the various firms were covered simultaneous in order to compare and tune concepts and themes that arose during the interviews. For some firms it was not possible because the limited availability of the employees. For instance in RT3 and TR1, all the interviews had to be undertaken in one day, because employees were from different sites and, during that day, they were all available at the headquarters premises.

Human Resources managers’ interviews were conducted from the beginning of September until late December 2010. The employees’ interviews began on February 2011 until late July 2011.
All interviews were on-site interviews, they were all made in Portuguese, they were all tape recorded with the interviewees’ full knowledge and consent and they varied in length between fifty minutes to one hour and a half. At the end, a total of 72 interviews (an average of 6 per firm, including the institutional interview) were made, see Table 9.

<table>
<thead>
<tr>
<th>Firm Id</th>
<th>Institutional Interview with</th>
<th>Nr. of Employees Interviewed</th>
<th>Firm Id</th>
<th>Institutional Interview with</th>
<th>Nr. of Employees Interviewed</th>
</tr>
</thead>
<tbody>
<tr>
<td>BK1</td>
<td>HRM</td>
<td>5</td>
<td>RT1</td>
<td>HRM</td>
<td>5</td>
</tr>
<tr>
<td>BK2</td>
<td>HRM + HR Team</td>
<td>5</td>
<td>RT2</td>
<td>HRM</td>
<td>5</td>
</tr>
<tr>
<td>BK3</td>
<td>HRM</td>
<td>5</td>
<td>RT3</td>
<td>HRM</td>
<td>5</td>
</tr>
<tr>
<td>TR1</td>
<td>HRM</td>
<td>5</td>
<td>UT1</td>
<td>HRM</td>
<td>5</td>
</tr>
<tr>
<td>TR2</td>
<td>CEO + HRM</td>
<td>5</td>
<td>UT2</td>
<td>HRM + HR Team</td>
<td>5</td>
</tr>
<tr>
<td>TR3</td>
<td>HRM + HR Team</td>
<td>5</td>
<td>UT3</td>
<td>HRM + CSRM</td>
<td>5</td>
</tr>
</tbody>
</table>

Table 9 – Interviews - Number of interviews per firm

After the collection of voluminous data by means of the interviews, such data has to be processed and analysed. Analysis of data always implies some kind of transformation in order to draw clear, understandable, insightful, trustworthy and original conclusions (Gibbs, 2007). At the end, most writers recognize that qualitative data analysis involves both data handling and data interpretation (e.g. Gibbs, 2007, Flick, 2009). According to that, the researcher has, first, to develop an awareness of the kinds of data relevant for the research questions that can be examined and how such data can be described and explained and secondly to implement a number of practical activities that assist him/her to accomplish the former.

After defining the core themes, the transcribed interviews were coded using a concept-driven coding framework (Gibbs, 2007, King, 2004). As mentioned by Gibbs (2007) the concepts the codes represent come from the research literature but it is also natural that they come up during the reading of the transcripts, field notes and some documents handed out during the interviews (King, 2004). A good practice is to mount the analysis based on a conceptual framework build up upon the key thematic ideas (Ritchie et al., 2003). The conceptual framework illustrated in Figure 7 and the various variables enumerated in paragraph 5.4.2 were used as the base for the coding activity. Other themes became relevant during the development of the field work, as for example, the economic context of recession.
The next step was to compare and consolidate the analysis of all the interviews from the same firm, compare them with the interview with the Human Resources manager and the analysis performed for the other firms.

5.4.6. CROSS-ANALYSIS

Finally, triangulation was used to cross-check findings from both qualitative and quantitative research (Bryman, 2006). Indeed, the purpose of using methodological triangulation, by applying different ways of collecting data, was to seek corroboration from information from different levels, as both methodological approaches were clearly distinct in their focus and in the data they have provided.

Furthermore, the cross analysis of the data led to the enhancement and illustration of the results from quantitative research with the ones from the qualitative research. In this sense it can be considered that the triangulation served a complementarity approach (Bryman, 2006). Certainly, such a triangulation of perspectives enlarged the focus on the phenomenon under study by combining, supplementing, illuminating and analyzing afterwards the development of shared situations in interaction (Flick, 2004).

As it is common with this type of multi-methods approach (Bryman, 2006), research outcomes that were not foreseen were uncovered. In fact, the combination of the data generated surprising conclusions. Though, they were not entirely unexpected as the hypothesis was already stated in the research questions, the unambiguousness of the evidence was unanticipated.

5.5. CONCLUSION

This chapter presented and explained the methodological research path used in this research. Specifically, the chapter outlined the research strategy, methods and design undertaken.

The research will follow an inductive approach mainly due to the lack of literature linking work-family life studies and the social responsibility of the corporations. Though basically qualitative, it will combine quantitative and qualitative methods in a multi-paradigm research approach.
The use of a quantitative approach, in this research through a survey, has been applied frequently when studying work-personal/family life interface in general or any of its specific characteristics or relationships between them (e.g. Sanik, 1993, Greenglass et al., 1988, Burke, 1988, Higgins et al., 1992, Thomas and Ganster, 1995, Carlson and Perrew, 1999). Using a quantitative approach, in the present research was justified mainly because it would outline the applicability of the literature to the Portuguese environment in what concerns work-family policies and initiatives. Moreover, a quantitative approach, not only is well suited for testing theories (Bryman and Bell, 2007) but it is a simple, accessible and well-timed way of capturing and measuring reliable and valid data from a population, fairly large and dispersed such is the work-force of the various firms in order to compare indicators between firms and with literature in this area (May, 2006).

On the other hand, the option for qualitative methods, through semi-structured interviews, seems to be quite appropriate to research focusing on organizational characteristics and processes and to understand and interpret both individual and institutional perceptions and perspectives (e.g. Creswell, 1994, Bryman and Bell, 2007). Three main reasons can be presented. First, qualitative methods are more open to emergent issues and concerned with the participants’ view of the phenomena, while accepting the inherent subjectivity of the research; second, they are more sensitive to the organizational life under research, being able to capture and encompass that dynamism and third, they seek to provide a holistic view of the organization (Cassell and Symon, 1994).

Furthermore, the research will consist on a national cross-sectional study based on a set of twelve medium-large Portuguese firms, aggregated in four clusters grouped by economic activity: Banking and Financial Services, Wholesale and Retail, Transport and Utilities Services. The survey was answered by the Human Resources manager, who was also interviewed and by 2472 employees. 60 interviews to the employees (5 per firm) were also performed.

The combination of different perspectives - the institutional perspective, provided by the Human Resources managers and the employees’ perspectives – and of different research methods - collected through a survey and from in-depth semi-structured interviews, commonly referred to as triangulation of perspectives, enhances the vision of insightful concepts that characterize the social reality under study.
Besides, the core of the research is itself a triangulation of arenas and literatures: work-family life and corporate social responsibility. The findings and the cross analysis undertaken are presented in the subsequent chapters.
CHAPTER 6. FINDINGS

6.1. INTRODUCTION

In this chapter, after an initial overview, detailed findings from each institution are presented, according to the methodological framework described in CHAPTER 5. For each institution, it is described its history and the findings from the institutional commitment in the scope of corporate social responsibility and the firm’s work environment, with regard to work-family culture and the more global organizational context. The latter will be presented according to the literature reviewed and the concepts / variables of analysis stated in the methodological chapter. At the end of the chapter, patterns concerning institutional approaches to corporate social responsibility and the relation to organizational and managerial supportiveness are stated.

The inclusion of a brief history of each firm aims to set the institution in context and to transmit some unique attributes that can contribute to a deeper understanding of each institutional culture (e.g. Jensen and Meckling, 1976, Handy, 2002).

Findings from the institutional commitment in the scope of corporate social responsibility are a crucial theme for the research. The way it is stated is based on the interviews with the human resources manager and the employees and, occasionally, the content of CSR reports or similar documents showed during the interview or available from the public website of the firms. An association to the categorisation offered by Garriga and Mele (2004) is also made based on the institutional stance and the perceptions of the employees collected during the interviews.

In addition, a description of the firm’s work environment is given. This paragraph includes organizational data that was collected during the survey which was answered by the human resources manager as well as the perceptions of the employees expressed during the interviews about the work environment, namely in what concerns the work-family culture and the organisation as being supportive.

The organizational data includes a set of indicators that have been referred to attributes, antecedents or consequents of work-family life balancing, organizational context and social responsibility initiative (e.g. Lambert, 2000, Spector et al., 2004, Gambles et al., 2006, Lewis et al., 2007): number of employees, percentage of women in staff and in
management, percentage of workers with fixed-term contract, attrition rate and absenteeism.

The findings of the perceptions of the employees will allude to the variables of analysis listed on the methodological chapter. These variables include the dimensions considered by Thompson et al. (1999) with regard to work-family culture (time demands, negative career consequences and managerial support) and by Behson (2002b) for the more global organizational context (perceived organizational support, perceived fair interpersonal treatment and trust in management).

6.2. DESCRIPTIVE OVERVIEW

6.2.1. INSTITUTIONS

According to the data collected, the participating institutions are, as intentionally required, large institutions in what concerns the number of employees, both in Portugal and when considering the total number of employees.

<table>
<thead>
<tr>
<th>Organization</th>
<th>Control</th>
<th>Geography</th>
<th>Total Size</th>
<th>Size in Portugal</th>
<th>Women in management</th>
<th>Women in staff</th>
<th>Non Permanent Contracts</th>
<th>Absenteeism</th>
<th>Attrition Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Nr. Workers</td>
<td>Nr. Workers %</td>
<td>%</td>
<td>%</td>
<td>%</td>
<td>%</td>
<td>%</td>
</tr>
<tr>
<td>BK1</td>
<td>Private (Domestic)</td>
<td>Portugal &gt; Global</td>
<td>10000</td>
<td>8400</td>
<td>26.0</td>
<td>45.0</td>
<td>5.6</td>
<td>3.6</td>
<td>6.0</td>
</tr>
<tr>
<td>BK2</td>
<td>Private (Domestic)</td>
<td>Portugal &gt; Global</td>
<td>20000</td>
<td>11000</td>
<td>14.0</td>
<td>39.0</td>
<td>7.0</td>
<td>3.3</td>
<td>19.0</td>
</tr>
<tr>
<td>BK3</td>
<td>Private (Foreign)</td>
<td>Global &gt; Portugal</td>
<td>180000</td>
<td>5800</td>
<td>43.0</td>
<td>45.0</td>
<td>3.0</td>
<td>1.1</td>
<td>2.2</td>
</tr>
<tr>
<td>RT1</td>
<td>Private (Domestic)</td>
<td>Portugal &gt; Global</td>
<td>60000</td>
<td>29000</td>
<td>21.0</td>
<td>72.0</td>
<td>28.3</td>
<td>6.9</td>
<td>35.2</td>
</tr>
<tr>
<td>RT2</td>
<td>Private (Foreign)</td>
<td>Global &gt; Portugal</td>
<td>285000</td>
<td>1200</td>
<td>31.0</td>
<td>44.0</td>
<td>12.0</td>
<td>1.0</td>
<td>4.0</td>
</tr>
<tr>
<td>RT3</td>
<td>Private (Foreign)</td>
<td>Global &gt; Portugal</td>
<td>127000</td>
<td>1500</td>
<td>50.0</td>
<td>60.0</td>
<td>20.0</td>
<td>6.0</td>
<td>9.0</td>
</tr>
<tr>
<td>TR1</td>
<td>Government</td>
<td>Portugal</td>
<td>2800</td>
<td>2800</td>
<td>23.0</td>
<td>9.0</td>
<td>1.0</td>
<td>5.4</td>
<td>3.0</td>
</tr>
<tr>
<td>TR2</td>
<td>Government</td>
<td>Portugal</td>
<td>3200</td>
<td>3200</td>
<td>30.0</td>
<td>16.0</td>
<td>1.6</td>
<td>6.4</td>
<td>4.0</td>
</tr>
<tr>
<td>TR3</td>
<td>Government</td>
<td>Portugal</td>
<td>10500</td>
<td>10500</td>
<td>36.0</td>
<td>43.1</td>
<td>4.4</td>
<td>7.0</td>
<td>7.3</td>
</tr>
<tr>
<td>UT1</td>
<td>Government</td>
<td>Portugal</td>
<td>2850</td>
<td>2850</td>
<td>11.4</td>
<td>28.4</td>
<td>10.1</td>
<td>5.0</td>
<td>10.4</td>
</tr>
<tr>
<td>UT2</td>
<td>Government</td>
<td>Portugal &gt; Global</td>
<td>12000</td>
<td>7200</td>
<td>24.4</td>
<td>20.0</td>
<td>0.6</td>
<td>3.6</td>
<td>3.9</td>
</tr>
<tr>
<td>UT3</td>
<td>Government</td>
<td>Portugal &gt; Global</td>
<td>23000</td>
<td>11000</td>
<td>32.0</td>
<td>36.0</td>
<td>27.0</td>
<td>3.3</td>
<td>1.4</td>
</tr>
</tbody>
</table>

Table 10 – Overview of participating institutions
Two variables were constructed in order to characterize the organization according to:

- **Geography where the organization is present:**
  - Portugal – Portuguese company with domestic scope
  - Portugal > Global – Portuguese company with international expression
  - Global > Portugal – Multinational firm operating in Portugal

- **Company’s control:**
  - Government – public or private enterprise where the control of the company is exercised, or greatly influenced, by the Portuguese Government.
  - Private (Domestic) – Private company majority-owned by Portuguese capital.
  - Private (Foreign) – Multinational firm operating in Portugal

In the set of participating firms, see Table 10, there are three multinational companies operating in Portugal, two in the Retail and Wholesale sector and one Bank Institution. All others are preponderantly owned by Portuguese capital. Some of these companies have expanded internationally as it is the case of BK2, RT1 and UT3. Also within Portuguese firms and considering its property, different situations can be distinguished: some are state-owned, such as the transport companies; others, even though they are mostly private because they act on strategic sectors, the state holds "golden shares" and others whose capital is concentrated in a reference shareholder, normally a family. This is the case of BK1, RT1 and UT1.

The balance between male and female employees, both in staff and in management functions, follows the expected pattern of a gender gap. The gap for managerial and supervisory jobs is normally larger, though a smooth trend can be verified (from 10%, a very large gap to 50%, no gap) (OECD, 2011a). The exceptions are the cases of companies TR2 and UT2. In these latter, the prevalence of men in the staff is explained by the historical and socio-professional specificities of the sectors where they operate (railway and energy). However, the number of female workers in both cases has been increasing and, thus, the majority of women that have been hired in recent years are skilled workers and managers, causing the percentage of women in management functions to be high when compared to the percentage of women in staff. Presently, increasing educational attainment levels among women have gone hand-in-hand with improved labour market outcomes for women (OECD, 2011a).
Regarding the percentage of employees with temporary contracts, higher values can be found in the case of Retail and Wholesale sector firms. But they can also be found in UT1, mainly due to the operation of the manual tolling system, and UT3, in the area of telecommunications, mainly related to the front-office stores.

Concerning absenteeism, the indicators presented can be considered normal in each economic sector as they are, for instance, slightly high in major retail and wholesale firms (RT1 and RT3) and traditional public sector (transport sector and UT1). The attrition rate follows the same pattern with an exception: BK2. A possible explanation is that, since 2008, BK2 has been introducing a set of internal initiatives regarding organizational streamlining and process optimization, namely through a transverse personnel cost-reduction program and significant cost-reduction in all operations aiming for the adjustment of structure to business volume, in the new financial crisis context.

6.2.2. STAFF

The composition of the sample of employees that answered to the survey can be considered valid according to the criteria defined previously: if the survey has an appropriate sample size and a correct structure, the obtained findings can be considered as valid ones and generalization to the sampled population is possible to a certain extension (Bryman and Bell, 2007). Furthermore, a random sample was assumed to be adequate (Sekaran, 2003) and the minimum size required for the sample - 100 observations per Organisation (Easterby-Smith et al., 2002) – was achieved for all the participating organizations.

Generally speaking the social-demographic variables included in the survey, such as gender, age and educational level (e.g. Scandura and Lankau, 1997, Duxbury and Higgins, 1991), the fact of having children at home (e.g. Behson, 2002b, Carlson, 1999, Grzywacz and Marks, 2000) and, in general, having a working spouse (e.g. Barnett and Brennan, 1997) are known antecedents of work-family life conflict.

According to the data collected, the set of participating employees from all institutions were men and women, most of them aged between 30 and 40 years old (see Table 11). BK2, TR1, TR2 and UT2 present old labour forces. Retail in general and RT3 in particular presents a notoriously young labour force.
The majority of the employees were married or had been married, see Table 12, they had children and the average number of children per employee is 1.3 children / employee. Firms with a high percentage of single employees (RT3: 37% and RT1: 22.3%) are exceptions to this generic pattern. Reasons can be traced to the youth of the employees and the percentage of employees with temporary contracts that can be found in the case of Retail and Wholesale sector firms. For the majority of the employees, the youngest child living at home is 3 to 13 years old with some exceptions. The youngest child of most parents in RT3 is, on average, younger than 3 years old. For TR1 and UT2, the average age for the children of their employees is higher explained by the fact that their labour forces are also older.

<table>
<thead>
<tr>
<th>Orgid</th>
<th>Gender</th>
<th>Age</th>
<th>Marital Status</th>
<th>Children</th>
<th>Age of Youngest living at home</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Male</td>
<td>Female</td>
<td>25-30</td>
<td>31-40</td>
<td>41-50</td>
</tr>
<tr>
<td>BK1</td>
<td>47.5%</td>
<td>52.5%</td>
<td>0.0%</td>
<td>12.2%</td>
<td>44.3%</td>
</tr>
<tr>
<td>BK2</td>
<td>61.4%</td>
<td>38.6%</td>
<td>0.6%</td>
<td>8.4%</td>
<td>32.1%</td>
</tr>
<tr>
<td>BK3</td>
<td>51.3%</td>
<td>48.7%</td>
<td>0.9%</td>
<td>12.4%</td>
<td>36.3%</td>
</tr>
<tr>
<td>RT1</td>
<td>46.0%</td>
<td>54.0%</td>
<td>0.0%</td>
<td>10.1%</td>
<td>48.9%</td>
</tr>
<tr>
<td>RT2</td>
<td>70.4%</td>
<td>29.6%</td>
<td>0.7%</td>
<td>10.6%</td>
<td>59.2%</td>
</tr>
<tr>
<td>RT3</td>
<td>30.4%</td>
<td>69.6%</td>
<td>5.9%</td>
<td>43.7%</td>
<td>48.9%</td>
</tr>
<tr>
<td>TR1</td>
<td>78.4%</td>
<td>21.6%</td>
<td>3.2%</td>
<td>8.8%</td>
<td>36.8%</td>
</tr>
<tr>
<td>TR2</td>
<td>61.4%</td>
<td>38.6%</td>
<td>0.0%</td>
<td>5.8%</td>
<td>34.6%</td>
</tr>
<tr>
<td>TR3</td>
<td>53.7%</td>
<td>46.3%</td>
<td>1.0%</td>
<td>19.8%</td>
<td>34.0%</td>
</tr>
<tr>
<td>UT1</td>
<td>47.7%</td>
<td>52.3%</td>
<td>0.9%</td>
<td>12.3%</td>
<td>26.8%</td>
</tr>
<tr>
<td>UT2</td>
<td>59.2%</td>
<td>40.8%</td>
<td>0.0%</td>
<td>12.3%</td>
<td>26.8%</td>
</tr>
<tr>
<td>UT3</td>
<td>42.0%</td>
<td>58.0%</td>
<td>1.7%</td>
<td>4.2%</td>
<td>46.2%</td>
</tr>
</tbody>
</table>

Table 11 – Overview of participating staff (on survey) (1)

There is a clear pattern for the employees and their spouses for working fulltime, see Table 13. RT3 is again an exception as it has a significant number of workers working...
part-time at RT3. For most of these workers, working at RT3 is a second job, namely at night and weekends.

<table>
<thead>
<tr>
<th>orgid</th>
<th>Partial /</th>
<th>Fulltime</th>
<th>Partial /</th>
<th>Fulltime</th>
<th>Non-working</th>
</tr>
</thead>
<tbody>
<tr>
<td>BK1</td>
<td>0.9%</td>
<td>99.1%</td>
<td>13.1%</td>
<td>76.5%</td>
<td>9.5%</td>
</tr>
<tr>
<td>BK2</td>
<td>0.0%</td>
<td>100.0%</td>
<td>3.1%</td>
<td>78.2%</td>
<td>8.1%</td>
</tr>
<tr>
<td>BK3</td>
<td>0.9%</td>
<td>99.1%</td>
<td>2.7%</td>
<td>79.6%</td>
<td>3.5%</td>
</tr>
<tr>
<td>RT1</td>
<td>0.0%</td>
<td>100.0%</td>
<td>4.3%</td>
<td>65.5%</td>
<td>7.9%</td>
</tr>
<tr>
<td>RT2</td>
<td>2.8%</td>
<td>97.2%</td>
<td>10.6%</td>
<td>69.7%</td>
<td>7.0%</td>
</tr>
<tr>
<td>RT3</td>
<td>20.0%</td>
<td>80.0%</td>
<td>5.2%</td>
<td>63.0%</td>
<td>5.2%</td>
</tr>
<tr>
<td>TR1</td>
<td>0.8%</td>
<td>99.2%</td>
<td>4.8%</td>
<td>74.4%</td>
<td>10.4%</td>
</tr>
<tr>
<td>TR2</td>
<td>0.7%</td>
<td>99.3%</td>
<td>4.1%</td>
<td>70.2%</td>
<td>9.6%</td>
</tr>
<tr>
<td>TR3</td>
<td>1.0%</td>
<td>99.0%</td>
<td>5.1%</td>
<td>65.0%</td>
<td>13.2%</td>
</tr>
<tr>
<td>UT1</td>
<td>0.0%</td>
<td>100.0%</td>
<td>5.3%</td>
<td>72.9%</td>
<td>6.9%</td>
</tr>
<tr>
<td>UT2</td>
<td>1.8%</td>
<td>98.2%</td>
<td>3.5%</td>
<td>62.7%</td>
<td>15.8%</td>
</tr>
<tr>
<td>UT3</td>
<td>0.0%</td>
<td>100.0%</td>
<td>2.5%</td>
<td>79.4%</td>
<td>2.1%</td>
</tr>
</tbody>
</table>

Table 13 – Overview of participating staff (on survey) (3)

According to Table 14, the distribution of the participating employees between the various hierarchical levels and functional areas was considered to be adequate for the analysis of each institution as it has sufficient diversity.

<table>
<thead>
<tr>
<th>orgid</th>
<th>Other</th>
<th>Supervisor/</th>
<th>Line Manager</th>
<th>Top Manager</th>
<th>Head Office</th>
<th>Operations</th>
<th>Commercial</th>
<th>Technical</th>
</tr>
</thead>
<tbody>
<tr>
<td>BK1</td>
<td>69.7%</td>
<td>4.1%</td>
<td>19.0%</td>
<td>7.2%</td>
<td>46.6%</td>
<td>4.5%</td>
<td>16.7%</td>
<td>32.1%</td>
</tr>
<tr>
<td>BK2</td>
<td>68.5%</td>
<td>6.5%</td>
<td>10.6%</td>
<td>14.3%</td>
<td>17.1%</td>
<td>2.5%</td>
<td>45.5%</td>
<td>34.9%</td>
</tr>
<tr>
<td>BK3</td>
<td>60.2%</td>
<td>3.5%</td>
<td>17.7%</td>
<td>18.6%</td>
<td>31.0%</td>
<td>0.9%</td>
<td>35.4%</td>
<td>32.7%</td>
</tr>
<tr>
<td>RT1</td>
<td>32.4%</td>
<td>16.5%</td>
<td>35.3%</td>
<td>15.8%</td>
<td>21.6%</td>
<td>10.8%</td>
<td>15.8%</td>
<td>51.8%</td>
</tr>
<tr>
<td>RT2</td>
<td>77.5%</td>
<td>4.2%</td>
<td>11.3%</td>
<td>7.0%</td>
<td>26.1%</td>
<td>5.6%</td>
<td>52.1%</td>
<td>16.2%</td>
</tr>
<tr>
<td>RT3</td>
<td>61.5%</td>
<td>2.2%</td>
<td>28.1%</td>
<td>8.1%</td>
<td>60.0%</td>
<td>5.2%</td>
<td>5.2%</td>
<td>29.6%</td>
</tr>
<tr>
<td>TR1</td>
<td>37.6%</td>
<td>18.4%</td>
<td>29.6%</td>
<td>14.4%</td>
<td>20.8%</td>
<td>20.8%</td>
<td>1.6%</td>
<td>56.8%</td>
</tr>
<tr>
<td>TR2</td>
<td>59.9%</td>
<td>7.5%</td>
<td>26.4%</td>
<td>6.2%</td>
<td>27.1%</td>
<td>16.8%</td>
<td>25.3%</td>
<td>30.8%</td>
</tr>
<tr>
<td>TR3</td>
<td>64.0%</td>
<td>6.1%</td>
<td>20.8%</td>
<td>9.1%</td>
<td>25.4%</td>
<td>23.4%</td>
<td>17.8%</td>
<td>33.5%</td>
</tr>
<tr>
<td>UT1</td>
<td>43.0%</td>
<td>3.4%</td>
<td>45.8%</td>
<td>7.8%</td>
<td>49.8%</td>
<td>11.2%</td>
<td>4.4%</td>
<td>34.6%</td>
</tr>
<tr>
<td>UT2</td>
<td>42.1%</td>
<td>1.3%</td>
<td>39.5%</td>
<td>17.1%</td>
<td>46.1%</td>
<td>7.9%</td>
<td>8.3%</td>
<td>37.7%</td>
</tr>
<tr>
<td>UT3</td>
<td>30.3%</td>
<td>0.8%</td>
<td>31.9%</td>
<td>37.0%</td>
<td>52.9%</td>
<td>0.0%</td>
<td>9.7%</td>
<td>37.4%</td>
</tr>
</tbody>
</table>

Table 14 – Overview of participating staff (on survey) (4)

It is worth to reinforce that the composition of the sample is not meant to be a statistical representation of the labour force but a theoretical sampling (Denzin, 1989), composed of a diversity of illustrative cases with the intention of fostering analytical challenges (Pettigrew, 1990a).
6.3. INSTITUTIONS CHARACTERIZATION

6.3.1. BANKING AND FINANCIAL SERVICES SECTOR

6.3.1.1. BK1

6.3.1.1.1. HISTORY

BK1 is a Portuguese private financial group, established for over 140 years. It is one of the largest banks in Portugal, with a present market share of more than 20% in Portugal and the largest Portuguese bank listed on the stock exchange.

BK1 has its origin in the financial activities conducted by a Portuguese entrepreneur in his currency exchange business founded in Lisbon circa 1870. From that time onwards he founded several banking houses always as major partner. At the beginning of the 20th century, the banking houses were integrated into a banking institution and a national expansion strategy began. Soon it owned the largest branch network owned by private banks at national level and featured among the five largest private banking institutions in Portugal. In the ensuing years, BK1 consolidated its position by founding an insurance company, opening new branches and becoming actively involved in the internationalization of the Portuguese economy. In 1975 all national credit institutions headquartered in Portugal were nationalized. The family owning the majority of BK1 continued operating abroad. In the 80s, after banking activities were again opened to private initiative, the family returned to Portugal and one decade after, they regain the control of BK1. Since then, BK1 recovered the competitive position and consolidated its national and international strategy, evolving to a global financial group.

6.3.1.1.2. CORPORATE SOCIAL RESPONSIBILITY

In the scope of Corporate Social Responsibility, “BK1 is a well-known institution in the Portuguese society by its multiple initiatives in the area of cultural and scientific patronage, education and literacy, the environment and social solidarity” (BK10). Moreover BK1 produces a CSR report since 2004 according to the framework promoted

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1 (BK10) means that the citation is extracted from BK10 Interview, which corresponds to the interview with the Human Resources Manager of BK1 firm. For a list of all interviews, see Appendix E. List of Interviews.
by the Global Reporting Initiative (GRI), it also subscribed to the Equator Principles - a credit risk management framework for determining, assessing and managing environmental and social risk in project finance transactions - and it integrates the FTSE4Good index - an international benchmark that reflects the performance of socially responsible listed companies. Today, these practices are common practices to the major financial institutions in Portugal. All the three participating institutions have these same practices and this tendency of public reporting is in line with the principle of the “triple-bottom-line” accounting developed by Elkington (2004).

Social concern and the concern for the welfare of the workers is part of BK1’s practices, most likely due to the strong influence of the family major shareholder of the bank. The implementation of most of the existent social practices comes from circa 1940 and it has a fairly paternalistic style (Wren, 2005). "For example, at that time, the doctor was going home to provide support to the worker and his entire family" (BK11). And “there was a school for the boys who started to work at the Bank at an early stage so that they could take the basic education and go forward. That is why, there are people working at BK1 for about 50 years” (BK11).

Nowadays, there is still a budget reserved for the workers having serious economical difficulties, such as cases of spouse unemployment, divorces or single-parenting and general household over-indebtedness. In 2010, BK1 supported 400 families, 5% of its work force in Portugal. Furthermore, benefits to the workers and their family include education and health care. However, while the health care includes all the workers and their family, in what regards educational grants, only the workers with lower incomes can benefit from it. Moreover BK1 is responsible for a number of retired persons practically equal to the number of active employees. This responsibility extrapolates the legal one as there are policies concerning health care and social care applicable to them.

But in BK1, the underlying philosophy in what concerns CSR can be regarded as instrumental, according to the classification of Garriga and Mele (2004). In fact, the reason for the benefits above mentioned is mixed. Tradition and heritage from welfare capitalism is one of them. But it is also clear that “it is a question of image and prestige, either externally or internally” (BK15). The institution also believes that with such policies, people feel more integrated, more committed, more engaged, more motivated, more available to work. Besides, though they continue to proactively contribute to the
social, cultural and environmental development of the country, the most commonly cited orientation when referring to internal social policies is that “we stick to the law because we have thousands of employees so we cannot afford to have some benefits even when we recognize them as good” (BK10, BK15).

6.3.1.1.3. WORK ENVIRONMENT

BK1 is a major employer in Portugal. BK1 has a labour force of approximately 10000 employees. Approximately 8400 work in Portugal, 60% of these works in Lisbon or Oporto metropolitan region.

The percentage of women in the work force is 45% and the percentage of women in management levels is 26%. BK1 has a percentage of 5.6% of temporary employees working under a fixed term contract. Attrition rate is 10% and the rate of absenteeism is 3.6%, which can be considered normal in the banking and financing economic sector.

Though employees express their trust in top-management and believe that their organization supports them in terms of social benefits, the organizational environment does not seem to be very supportive according to Allen’s definition of the construct (Allen, 2001). Indeed, this study and other recent ones (e.g. Thompson et al., 1999) suggest that the availability of work–family benefits may have a relatively small effect on job attitudes and experiences. On the contrary the perception of organizational and managerial supportiveness was found to be dominant on the decision of use of available work–family benefits, reinforcing what was suggested by Behson (2002b).

The evaluation system is perceived as not fair as there are certain barriers to the professional career that have nothing to do with performance (for example, the academic background). This is the reason for a generalised feeling of unfairness, especially between employees that have their career stagnated for years though they have good performance evaluations. Moreover as most of them began to work at the bank very young and have now a considerable age (around 50), they do not know other realities. Thus, they do not think of quitting but they feel disappointed, with no professional future in sight.

Another subject contributing to the generalised unfairness perception is the differentiated treatment given to employees with short-term contracts by their peers and the managers.
All these evidences confirm the contribution of the general organizational context as defined by Behson (2002b) (perceived organizational support, perceived fair interpersonal treatment, and trust in management) for explaining variance in job satisfaction and affective organizational commitment, as noticed in this firm.

Concerning the different dimensions of work-family culture as defined by Thompson et al. (1999), time demands are not a question at BK1, but managers expect that employees prioritize their work over their family commitments. Flexibility agreements, with or without a salary reduction, are practically impossible. When they occur it is always a personal decision and one has to assume the career penalties as they are seen as less engaged with the work. Managers are example of a “long working hours”, pressure and control style and accordingly to (e.g. Starrels, 1992) this factor thwarts the use and effectiveness of work–family life programmes.

6.3.1.2. BK2

6.3.1.2.1. HISTORY

BK2 was the first private Portuguese Commercial Bank established after the liberalization and the development of the financial system in 1985. It was founded with the support of hundreds of shareholders from the Portuguese economic scenario.

Soon after its foundation, the Bank based its growth on the acquisition of domestic banks so as to complement its business and to gain and consolidate a competitive position in the banking, insurance and other related financial services markets. Hence it incorporated two insurance companies and, in 1995 and 2000, it acquired two financial institutions between the older and larger ones operating in the Portuguese financial system and became the largest privately owned Portuguese bank.

After the consolidation of its reference position in the Portuguese market, BK2 focused on the expansion into new geographies, namely emerging markets in Europe and Africa.

Today BK2 continues to be the largest privately owned Portuguese bank, it has the country's largest banking distribution network and it is the second bank in terms of market share.
6.3.1.2.2. CORPORATE SOCIAL RESPONSIBILITY

Since its foundation, BK2 publicly assumes its social responsibility as intrinsic to its mission, “reflected in the valorisation of its employees and through the exercise of its social responsibility in the surrounding communities of which it is part of” (BK20). BK2 set up a Foundation which embodies its social responsibilities and it is involved in two major areas: Culture and Solidarity. Also, it provides good practices and it is present in indexes such as those mentioned when describing BK1 and following the triple bottom-line principle (Elkington, 2004).

Social concern has been a landmark concern since the beginning of the institution. A clear example is the fact that, though it took 10 years for the kindergarten to be built and inaugurated, it was thought since the foundational strategic plan of the bank. Internally, this concern is materialised by granting not only all the benefits that arise from the bank sector collective bargaining but also a set of conditions for effective support to the satisfaction of the basic needs of their employees’ families (for example, credit facilities for housing or social purposes, including parents and children, and a social fund for actual situations of need).

The benefits for the bank are clear: “These benefits - loyalty, motivation and engagement with the bank growth - are reassuring. Our workers know that some of their concerns are covered and they are more available for work.” (BK20).

There were times where family used to be a core value of the bank (for example paid parenting leave is longer than the legal one, both for the mother and the father), not only internally but as a societal concern the bank cared and addressed. It was a top-down example. Certainly, this attitude was related to the recognition of the fact they were the largest Portuguese private bank which gave them enormous business and social power in society but it also gave them the inherent responsibility. This approach seems to be in line with the political theories described by Garriga and Mele (2004). However, the fact that family was a core value by itself reveals an ethical obligation above any other consideration, ordered to the necessity to achieve a good society and human sustainability (Gladwin et al., 1995), more similar to the ethical theories described in the same categorization (Garriga and Mele, 2004).
Recently, in a scenario of economical unrest and aggressive competition, business survival comes first and a more instrumental attitude was adopted by the bank. “Increase results through increasing people’s engagement” (BK23, BK25) is now the motto.

6.3.1.2.3. WORK ENVIRONMENT

BK2 is a major employer in Portugal. BK2 has a labour force of approximately 20000 employees all over the world, with more than 10000 of them working in Portugal. The percentage of women in the work force is 39% and the percentage of women in management levels is 14%. BK2 has a percentage of employees working under a fixed term contract of 7%. Attrition rate is 19% while the absenteeism is 3.3%. Though the latter can be considered normal in its sector, the attrition rate is quite high. A possible explanation is that, since 2008, BK2 has set up a set of internal initiatives regarding organizational streamlining and process optimization, namely through a transverse personnel cost-reduction program and significant cost-reduction in all operations aiming the adjustment of structure to business volume, in the new financial crisis context. This same reason can be applied to justify the high rate of workers under fixed-term contract when compared with the other participating banking institutions.

With a not so young workforce (average age of 42 years), the process of strategic and organizational change has been painful. Perceived feelings of fear, disinterest, tiredness, lack of motivation are undermining the work environment.

Apart from the external unfavourable scenario, two major factors are recurrently referred during the interviews: “the board management is distant and the middle management lacks leadership” (BK24). The distance is an obstacle for trust in top-management: “The previous CEO used to know everyone, our names and even our children names. Everyone entering the bank was introduced to him. The actual CEO is different. He is much more sheltered” (BK23). And middle managers are “obsessed by the results. They are exceptional professionals but unable to manage people” (BK21). Indeed the effects of managerial supportiveness on employees’ outcomes (such as work and life satisfaction) (e.g. Thompson et al., 1999, Frone et al., 1997a, Goff et al., 1990) as well as the perceived fair interpersonal treatment in work environment (Donovan et al., 1998) and the perceived fairness of performance appraisal systems correlated with trust in management (Mayer and Davis, 1999) were well established but with the present economic climate are being eroded.
The transition from the ancient more humanizing culture to the new more competitive culture is naturally eroding the family-supportive environment that used to characterise the institution. For example, the fact of considering the personal and family life priorities similar or more important than work life that used to be nurtured is now seen as symptom of absence, disinterest and lack of commitment in line with conclusions from previous studies (e.g. Morris, 1997, Behson, 2002a).

When there is a recession and results decrease instead of growing, there are seldom possibilities for evolution in the professional career. “What used to be a nurturing environment became a hostile one because everyone knows that only the exceptional ones will be promoted” (BK23, BK25). Thus, performance appraisal system is regarded as unfair by the employees and that undermines trust in management (Mayer and Davis, 1999) and, ultimately, the perception of the organization’s supportiveness (Behson, 2002b).

6.3.1.3.     BK3

6.3.1.3.1.   HISTORY

BK3 is the result of the largest cross-border transaction of the Iberian financial sector. In 1999, two major and long established Spanish Financial Institutions were merged and the new financial group assumed the leadership of the ibero-american financial sector. This group acquired, in 2000, two Portuguese banks and established BK3 as the Portuguese subsidiary of the global group. The acquired Portuguese banks were found circa 1950. They had been large and solid financial institutions until they went through the process of nationalization. After the establishment, in four years, BK3 doubled its results. Today, BK3 is the third private bank in Portugal and has a market share of about 12%.

6.3.1.3.2.   CORPORATE SOCIAL RESPONSIBILITY

Naturally, BK3 has embedded the values, strategy and culture of the global group. Their practices and commitment regarding Corporate Social Responsibility and Work-Family Life balance are recognized namely through the presence in indexes such as the FTSE4Good Index and Dow-Jones Sustainability Index and the other practices mentioned when describing BK1 and according to the triple bottom-line principles (Elkington, 2004). The Corporate Social Responsibility policy of BK3 has different areas of action,
namely social solidarity, the environment, culture, health and sport. However, in recent years, it has a special focus on supporting science and the university.

In Portugal, BK3 is still in a highly dynamic process of growth. In the scope of people management, this scenario has normally two consequences if the firm sets up adequate policies: it is possible to attract more talented young people and it is also possible to retain more people as it gives more career progression possibilities (Allred et al., 1996) than a mature firm. And talented young people are attracted, among other reasons, to firms demonstrating commitment to themes like Sustainability, CSR and Work-Life Balance (e.g. Bhattacharya Cb, 2008, Dychtwald et al., 2006, Hewlett and Luce, 2005).

Investment policies in education as well as the creative facilitation practices of work-family life balancing reflect the Bank's effort to increment its legitimacy and prestige towards society. Due to the fact of being a relatively newcomer but also because of its attempt to embed the local culture, BK3 explicitly “tries to take into account cultural and social demands and integrates them in such a way that the business operates in accordance with social values” (BK30). This approach reiterates the theory stated by Preston and Post (1975). According to these authors, corporate social responsibility in such firms is focused on the detection and scanning of, and response to, the social demands that achieve social legitimacy, greater social acceptance and prestige. When referring to the categorisation of Garriga and Mele (2004), this firm could be considered as following an integrative strategic approach in what concerns CSR.

6.3.1.3.3. WORK ENVIRONMENT

BK3 has approximately 6000 workers in Portugal. They are part of the 180000 workers that the global Financial Group employs all over the world. In BK3, the percentage of women in the work force is 45% and the percentage of women in management levels is 43%. BK3 has a percentage of temporary employees working under a fixed term contract of 3%. Attrition rate is 2.2% while the absenteeism is 1.1%. These indicators are slightly different from the other participating institutions, namely in what concerns the presence of women in management levels and the attrition rate. A possible explanation is that there is a strong international orientation regarding diversity management which aims, among other goals, to increase the presence of women in management positions.
The rising trajectory of BK3 even in a national recession scenario, for its young workforce, is synonym of a good strategy and a potential fast internal career. As a consequence, there is a general feeling of trust in top management (Mayer and Davis, 1999). Another consequence is that people are results obsessed. Competition inside and between teams and departments exists and it is promoted, namely through all sort of internal contests. In such a competitive environment, though advocated otherwise, people feel the stress of time demands, negative appreciation when they need to respond to care responsibilities and, in general, they do not feel personally supported by the direct manager or the team they work with. However, everyone considers that as an organisation, the bank is quite supportive.

This duality between the organization and the team dimension reinforces the idea explored by Allen (2001) that when characterizing a family-supportive work environment, in addition to the work-family culture lived in the small unit or team one works, the employees’ perceptions regarding the extent their organization is family-supportive should also be considered. They are different constructs and equally important, though Behson (2002b) poses that, at the end, the organizational characteristics prevail in employees’ perceptions.

**6.3.2. RETAIL AND WHOLESALE SECTOR**

**6.3.2.1. RT1**

**6.3.2.1.1. HISTORY**

RT1 is a Portuguese Group with international projection operating in Food Distribution and Manufacturing. Throughout its history, RT1 has been through major transformations. RT1 has its origins, more than 200 years ago, in a small family store in the centre of Lisbon. However, it is only in the outset of the 20th century that the family of the present Chairman of the Group acquires the store. This acquisition brought about the growth of the Group, which decided to restructure and expand its chain of retail stores. During World War II, with the shortage of some essential items, the company decided to extend its operations to manufacturing, creating a large factory and establishing a joint venture with a major multinational group. Unlike many other large Portuguese companies, RT1 operations were not affected by the revolution in 1974. The stability of the company
seems to have been guaranteed by its almost total family control. In early 80s, again through a joint venture with a multinational group, a supermarket company was established. In the 90s, part of the capital was open to public participation, with the launch on the Lisbon Stock Exchange, while the control of the company was kept in the hands of the family owning the group. Through the acquisition of supermarkets, hypermarkets and cash & carry chains as well as a strong organic growth, RT1 consolidated its national leading position in the food retail market. Since 2000, internationalization and expansion abroad complemented the strategy of the Group. Nowadays, it is mainly located in Europe.

6.3.2.1.2. CORPORATE SOCIAL RESPONSIBILITY

The Group is also among the biggest Portuguese employers. In Portugal, the majority of the employees at RT1 are young women with basic school background and, therefore, part of the social responsibilities assumed by RT1 is the training and education of its employees. Since the beginning of its history, the nurturing of its employees has been a recurrent concern of the board. As an example, it was the first Portuguese company to pay a Christmas bonus to its workers and to install a canteen in its premises.

Nowadays, this concern is materialised by a package of benefits. The access to such benefits depends on the number of years with the firm (for example, after 5 years, you are granted a life insurance and, after 15 years, you earn one more monthly salary) but also it has to do with special occasions in the family life cycle (for example, the firm offers a maternity / paternity kit when a new child is born, a back-to-school kit while the child is in primary school). All these benefits are delivered with a personal letter from the chairman. Other facilities in major logistic centres are also available (for example, canteen, kindergarten, transport, basic school).

The “sense of being a family” (RT10) and “the sense of being there when the employees need” (RT14) is highly promoted, namely by the chairman, the elder of the family shareholder. Consistently, “he deals personally with every case of economic hardship on the labor force” (RT10). In this regard, it is possible to note the traditionally approach to social responsibility from welfare capitalism. Though individual and paternalistic, that approach could be categorize as normative or ethical according to Garriga and Mele (2004) as “It is not because we are a major employer. It is not because it is part of our role in society. It is because it is the way it has to be.” (RT12).
More arguable is the question of whether it is an individual or organizational ethics. Furthermore, CSR stance has evolved, triggered by growth and internationalisation. “Years ago, when we (the firm) knew someone was in need, we would help. Simple as that: we knew, we helped. Nowadays, there is a formal department for that, with a budget, with ideas, with a structure. And that is important if we can answer to our people in need but it is also important, externally, if we want to show that we are present in this arena (corporate social responsibility).” (RT11).

This evolution is subtle but, at the same time, radical. Social policies were, in the past, low-profile, discretionary and personified in the chairman (Agel et al., 1999). The moment the firm, as a firm, fostered external visibility of its social policies, social expectations also evolved, became more demanding to the institution as a collective and, now, the firm finds itself dealing with the integration of such expectations: “for example, the chairman is perceived as a highly supportive manager. He became a role-model. Now every manager and supervisor is expected to behave the same way. I don’t think we were prepared for that.” (RT13). The background idea of “doing what is right” has not been abandoned, but when it was institutionalised other concepts and rationale became prevalent. Basically, now, the focus of CSR approach is to achieve a relevant international market position but also international social acceptance and prestige. Thus the underlying philosophy in what concerns CSR can be regarded, at present, as integrative, according to the classification of Garriga and Mele (2004).

6.3.2.1.3. WORK ENVIRONMENT

RT1 has approximately 60000 employees, half of it working in Portugal. In RT1, the percentage of women in the work force is 72% and the percentage of women in management levels is 21%. RT1 has a percentage of temporary employees working under a fixed term contract of 28.3%. Attrition rate is 35.2% while the absenteeism is 6.9%. The attrition rate, though high compared to other industries, is similar to major Portuguese retail groups and it is greatly influenced by the local labour market and the fierce rivalry between major players in this business. The vast set of benefits already mentioned are a relevant tool for retaining workers after a few years of experience in the firm but not to attract nor retain during the first two to three years, in line with previous studies (Beauregard and Henry, 2009). With a low salary, a hard job and a very tough schedule - “for example, we can hire someone to make 1000 boxes per day, Monday to Sunday, from
midnight to nine” (RT14) - , when one has the opportunity to change to a softer job, he/she quits. Indeed work characteristics are a well established antecedent of job satisfaction and turnover intentions (e.g. Beauregard and Henry, 2009, Mauno et al., 2007)

The fact of having a family as the major shareholder greatly influences the work environment and the culture of the firm. Shared beliefs and values tend to be familiar ones and that potentiates a general feeling of trust in top management. Another outcome that is generally perceived is that, “throughout time, there is less uncertainty and more stability on the job” (RT15 and “at times of national uncertainty this is very important” (RT15). Both outcomes are in line with the consideration that organizational context can be seen as a construct built upon different dimensions as those stated previously (Behson, 2002b). Another outcome is that supervisors who normally come from internal career promotion are quite supportive and understanding because they are with the firm for many years and they do not feel threatened by younger workers. However their long tenure within the firm makes them more resistant to change, namely “they are not permeable to more institutional and less paternalistic ways of management and so they are a barrier to the messages we (Human Resources Management) want to send to everyone” (RT10). Another not so positive outcome regarding career management is that it is much more informal and, at the top, “there seems to be a glass ceiling for those who are not part of the family that is very difficult to break.” (RT14). This fact demotivates managers, special educated young ones who would like to foresee their career inside the firm in the medium-long term. Ultimately, this general perception of unfairness concerning career progression undermines the perceived interpersonal treatment (Donovan et al., 1998), trust in management (Mayer and Davis, 1999) and, consequently, the perceived organizational context (Behson, 2002b).

6.3.2.2. RT2

6.3.2.2.1. HISTORY

RT2 is the Portuguese subsidiary of a worldwide leader in convenient snacks, foods and beverages with over 285,000 employees. In 1987, this multinational settled in Portugal, acquiring a Portuguese factory that employed 50 workers. It kept the Portuguese brands and started to manufacture all its international major brands. In 2000, a new factory was started up, employing 400 workers. In these early years, it consolidated its position by creating a unique direct distribution network within the national territory, with a team of
auto sellers. Nowadays RT2 operations are consolidated with the Spanish counterpart, jointly addressing the Iberian market.

6.3.2.2.2. CORPORATE SOCIAL RESPONSIBILITY

As one of the world’s largest food and beverage companies, the group recognizes its responsibility in helping to give a positive contribution in the world and the communities it serves. Specifically, they have defined three areas of influence: Human, Environmental and Talent Sustainability. This sense of responsibility – “to do what is right; to act sustainably” (RT23)- impregnates the values, the culture, policies and management style of RT2 which is much in line with the “We all do believe that this is the way: to know our responsibilities, to be demanding with ourselves, to be excellent performers, to promote a caring environment, to be helpful to others.” (RT22). This mission is clearly in line with Normative Stakeholder Theory. This theory is based on the stakeholder theory as initially defined by Freeman (1994, 2008, Donaldson and Preston, 1995) according to which “we (the firm and our employees) have responsibilities towards ourselves, towards our clients, towards the whole world” (RT23) and extended with a normative core of ethical principles (Freeman, 1994). This stakeholder approach grounded in ethical principles presents a different perspective on CSR, in which ethics is central. As it is posed, the approach to CSR can be classified as ethical or normative according to Garriga and Mele’s matrix (2004).

Another characteristic of RT2 is “the fact of being part of a multinational. It makes the difference. Not only we are compelled to go farther but also it makes us do more and better in order to be globally recognized”(RT20). Global culture and practices, in what concerns CSR and HRM, have been introduced and they are visible and identifiable at the national site. “At the end, this global dimension makes us believe that is possible to make business in such a way” (RT20). Performance evaluation is a good example of desired balance between business and people. Individual target setting is expected in both fields and people component includes work-personal/family life issues. Moreover supervisor’s targets include his/her team members’ targets also in what regards both fields. Such an alignment proved to be an important way to promote the corporate position and overall trust in management. This finding confirms that perceived fairness of the performance evaluation system and the willingness to be vulnerable to the actions of management are correlated, according to Mayer and Davis (1999).
6.3.2.2.3. WORK ENVIRONMENT

In Portugal, RT2 has, at present, 1200 workers: 500 work at the industrial unit, 600 in distribution and 100 at the Portuguese headquarters. RT2 has a percentage of women in the work force of 44% and the percentage of women in managerial levels is 31%. RT2 has a percentage of temporary employees working under a fixed term contract of 12.0%. Attrition rate is 4.0% while the absenteeism is 1.0%. Compared with RT1, the attrition and absenteeism rates are quite different, the main reason being that RT2 does not have retail operations.

The main characteristic of RT2’s work-personal/family life policies is flexibility. Employees can enjoy free Fridays’ afternoons, sabbatical periods, flexible schedules, work at home and, “in principle, any realistic measure aiming to reach a better equilibrium between the different scopes of personal life” (RT20). All these policies are cultured worldwide as well as aggressive targets and a nurturing work environment. A nurturing environment is defined by the employees as “managers and peers are supportive with relation to family situations; conversations are positive; there is mutual trust; responsibility, autonomy and exigency are promoted” (RT22 and RT24) Employees perceive the supportiveness of the organization. Furthermore they have a perception that they are fairly treated as “evaluation procedures and orientations are quite transparent and the same all over the world” (RT25) and they do not perceive either difficulties with time demands from different scopes of their life or negative consequences on their career if they have a special flexible agreement. All these shared assumptions and beliefs regarding the extent to which the organization is perceived to support and value reconciliation between work and family life contributes to confirm the existence of a family-supportive culture as defined by Thompson et al. (1999) and an overall supportive organizational context (Behson, 2002b).

The key reason is that managers are an example of the use of such policies. Employees recognize such examples and think of them as role-models: “My manager is the first one to leave on Friday afternoon. And now I am doing the same.” (RT24) “When I need to work from home for personal or familiar reasons, I have no problem at all, and so does my manager. It is very convenient. It is a question of trust and loyalty. While I am at home, he (my manager) knows that I am working and that I will do what needs to be done.” (RT21) Moreover, “it is an organizational characteristic because I have worked
with different managers and I noticed that is a common behaviour” (RT22). According to the literature, managers’ social support (e.g. O'Driscoll et al., 2003, Thomas and Ganster, 1995) and example (e.g. Perlow, 1995, Starrels, 1992, Thompson et al., 1992) are crucial facilitators in not only reducing work-family role stressors but in promoting personal and family enrichment.

6.3.2.3. RT3

6.3.2.3.1. HISTORY

Similar to RT2, RT3 is the Portuguese subsidiary of the world’s largest home furnishing retailer. It is present in the Portuguese market since 2004 when it opened the first store. As part of the expansion plan of the group in Portugal, since then, RT3 opened two more stores and has planned to open four more. In Portugal there are also three industrial units included in the same parent company which manufacture furniture for the stores all over the world.

Like in the case of RT1, the parent company was founded as a family owned business and it is today owned by a foundation. Being owned by a private foundation enables the global company to grow in its own pace. The key concern is to make sure new stores across the world adhere to its core principles, working methods and practices while still adapting to local cultural preferences.

6.3.2.3.2. CORPORATE SOCIAL RESPONSIBILITY

This is also applicable to its CSR philosophy summarized in the notion that a better everyday life must not be achieved at the expense of people or the environment. According to this rationale, it presents a global focus on the fight against climate change and the fight for children's rights. Though incorporated in RT3 mission, these principles and their instantiation in social responsibility initiatives and people management practices are in general external inputs from the main headquarters. Local innovation and customization is incipient and the general perception is that the group has already thought of the best work methods and practices in the sense that they are the most adequate to the business model they are in and that all social concerns have already been addressed by the main office. In the categorization offered by Garriga and Mele (2004), the approach to CSR could be considered an integrative approach, as their mission explicitly states that business ought to integrate social demands, while considering that business depends on
society for its continuity and growth. Furthermore, these approaches regard business responsibility situated in time and thus depending on the values of society at that moment through the company’s functional roles (Preston and Post, 1975). The global focus of CSR in RT3 is a good example of such limitation.

6.3.2.3.3. **WORK ENVIRONMENT**

From a total of 127000 employees, RT3 has, at present, 1500 workers in Portugal: 1400 in retail stores and 100 at the Portuguese headquarters. RT3 has a percentage of women in the work force of 60% and the percentage of women in management levels is 50%. RT3 has a percentage of temporary employees working under a fixed term contract of 20.0%. Attrition rate is 9.0% while the absenteeism is 6.0%. Although RT3 activity is mainly retail operations, the rates are much smaller compared with RT1 mainly because it is a new company in Portugal, with a consistent and promising expansion plan and, for the moment, almost with no rivalry in Portugal.

According with Thompson’s notion of work-family culture (1999), as most employees work in shifts, most of them fixed or planned in advance, they do not considered to suffer stressful time demands or complex work-family life priorities management. Also they do not perceive negative career consequences when utilizing work–family benefits or devoting time to personal or family responsibilities, for example when they choose the option offered by the firm of extending the parental leave. Again this fact has to do with the job characteristics: “Our work has to be done at the shop and it is perfectly compatible with part-time agreements. In fact there a lot of part-time workers, namely students” (RT35). It also has to do with a singular characteristic of RT3: “We employ a significant number of students and people for whom this is a second job. These people do not have any expectations for a career here.” (RT30).

Based on these assumptions, employees consider that it is fair to evaluate attendance and the other components of the appraisal system and they are willing to adapt new work practices, reflecting that they trust management (Mayer and Davis, 1999). The overall organizational context is perceived as supportive according to the attributes defined by Behson (2002b) of fair interpersonal treatment - “The rules are known and, in general, we are treated with fairness” (RT33) - and perceived supportiveness – “When someone needs time, usually for exams or for the family, the team has no problem with that and reorganizes the schedule” (RT34).
Sentences like: “In my team, they are all very young and so am I. They do not see me as a manager in the traditional way. I am one more team member.” (RT31 and RT32) and “When I have something to ask or say, I go directly to the human resources people.” (RT33) indicate that the organization does not have a hierarchical model and that employees are managed in what regards their personnel needs by the central department and not by their direct manager. According to this, there is no evidence, either positive or negative, of the theoretical key concepts of supervisor support (e.g. O'Driscoll et al., 2003, Thomas and Ganster, 1995) and example (e.g. Perlow, 1995, Starrels, 1992, Thompson et al., 1992).

6.3.3. TRANSPORT SECTOR

6.3.3.1. TR1

6.3.3.1.1. HISTORY

TR1 is a long established company of passenger’s public transport in the metropolitan area of Lisbon. By 1900, regular tram service began and buses were inaugurated 40 years later. During last decades, there were big changes in the tram fleet, due to traffic conditions but especially due to its economical and social viability. Also other major transformations include the fleet renovation plan simultaneously with the outsourcing of the maintenance services, during 1990 and 2005. The reorganisation process meant, therefore, a significant change process including a major labour force reduction. Though most of the social benefits and practices were inherited from the public sector, the mentioned reorganization process also integrated a process of organizational modernization with major changes in the personnel management and development process, increasing their efficiency and performance. After 5 years of continuous readjustments, TR1 has circa 2800 employees. From those, 1800 bus drivers and 150 tram drivers ensure the circulation of a fleet composed of 752 buses, 57 trams, 3 funiculars and 1 elevator.

TR1 is 100% State-owned and the service it provides – to maintain and develop regular and continuous functioning of the public service of urban collective transport of passengers in the city of Lisbon – is considered to be a public service. This means that the company finances its activities with direct revenue passengers, with operating subsidies and compensatory allowances granted by the State, which are insufficient to cover the
cash requirements and to meet the investment plans and, therefore, increase the bank indebtedness.

At present, due to the national economic crisis, the privatization of the company is seen as a possible scenario and that uncertainty is perceived in the everyday life of this and other Portuguese firms of the public sector.

6.3.3.1.2. CORPORATE SOCIAL RESPONSIBILITY

Rendering public service is the driver for social responsibility at TR1. In accordance to this notion, TR1 joined several organizations (BCSD and UITP Charter on Sustainable Development), and is engaged in various local initiatives that contribute to Lisbon’s development in economic, social and environmental terms.

The positioning and practices traced in TR1 lead to consider its CSR approach, according to Garriga and Mele (2004), as a political approach. Indeed, the sense of providing a public service permeates the mission and the day-to-day of the employees of the TR1. “We have an important role in the economy: we are responsible for taking our passengers on time to the workplace.” (TR14) This notion is reinforced by the fact of being a public company: “Our shareholders are the customers themselves, the passengers.” (RT11) Integrated with this notion of business and social power that it has, it is clear for TR1 that a more efficient organization, with greater profitability and better organized, is the road to be a successful public company. “Being a public company nowadays means to maintain a social dimension while adopting competitive practices.” (RT13) This consistency is also revealed in the company's attitude in terms of social responsibility initiatives, focusing on “proactively promoting joint efforts with the authorities of the counties it serves” (RT10). This approach emphasizes the concept of corporate citizenship as being part of the community, as posed in the literature (Logsdon and Wood, 2002).

6.3.3.1.3. WORK ENVIRONMENT

As mentioned above, TR1 has, at present, 2800 workers with a percentage of women in the work force of 9% and the percentage of women in management levels is 23%. TR1 has a percentage of temporary employees working under a fixed term contract of 1.0%. Attrition rate is 3.0% while the absenteeism is 5.0%. Two characteristics can be found in TR1 labour force typical of established public firms: a large group of people working
30/40 years for the company and a significant number of family relationships (e.g. spouses, father and son).

With the outsourcing of the maintenance services, TR1 went through a major organizational change, aiming to modernize the working practices. “*Market, targets and other words are now common words within the company.*” (RT13) The perception expressed by the employees of the success of such change process is that it was achieved basically due to the commitment of the top management, trusted by everyone (Mayer and Davis, 1999), and without loosing some historical traits of its culture: informal, caring, capable of accommodating to family needs. Though with hard personal schedules, as for every transport firm, it is perceived the organizational support (Behson, 2002b) and the role of informal work accommodations to family needs as described by Behson (2002a): “*Buses are expected to leave on time. It is part of our personal evaluation and that is sometimes very hard*” (TR14) but “*Most of the times, it is possible to change the schedule in order to adjust to family needs, for example to go to school events.*” (TR15). Consequences are that stressing time demands and expectations (Carlson and Perrew, 1999) as well as negative career consequences (Lewis and Taylor, 1996) are not perceived by the employees. Though in general the employees feel they are fairly treated in the sense Donovan (1998) described it, some expressed that, for certain jobs, the evaluation process was not transparent and that fact, confirming the literature (Thompson et al., 1992), undermined the effectiveness of some practices regarding compensation and career evolution.

6.3.3.2. TR2

6.3.3.2.1. HISTORY

TR2 is the Portuguese firm responsible for rendering national and international passenger rail services. It is the Portuguese largest land transport operator, carrying per year more than 133 million passengers.

The first ever railway journey in Portugal took place on 28 October 1856 between Lisbon and Carregado (40 km NE of Lisbon) before being expanded across the whole country. Railway companies appeared in Portugal as a private undertaking. Both private and state companies operated side by side for a long time until they were all amalgamated circa 1950 into what would become TR2. During the revolutionary period, after 1974, TR2, as
all public service providers, was one of the firms that were nationalized. Since then, TR2 is a public business entity, 100% owned by the Portuguese State.

Just like TR1, the service it provides is considered a public service. Therefore, TR2 has fares obligations, i.e. the obligation to charge prices fixed or approved by the authorities normally contrary to the commercial interests of the company. This means that the company's financing structure is similar to the one explained for TR1, based on direct revenue passengers, operating subsidies and compensatory allowances granted by the State. Also similar is the fact that state-subsidies are insufficient to finance the activities and, therefore, they contribute to increase the firm’s bank indebtedness. In the case of TR2 as the needed structural modernization plans were systematically postponed, the huge financial liabilities are a major concern.

6.3.3.2.2. CORPORATE SOCIAL RESPONSIBILITY

People management practices and social benefits for the workers were inherited from the public sector and augmented throughout the years by means of collective bargain with powerful labour unions. Concerning CSR, TR2, due to the specificity of its service, assumes the “responsibility for contributing towards the economic development and social cohesion of the country and its inhabitants” (TR21). As it is posed, TR2 approach to CSR could indicate a political approach. However, due to its financial situation, an entire dependence on the state budget and the fact of not having a sound, clear and consistent strategy that enhances this stance, its CSR approach is transmitted by management, and perceived by the employees, as much more instrumental. “We have to be a proactive company in terms of social policies. First of all, because we are a state-owned company and the state itself is a welfare state. Thus, it requires us to implement a set of measures like having our own nurseries or child care allowances. However, within these assumptions, we will only go as far as required” (TR21). Though with a vast tradition of welfare policies that included summer camps, own health system, schools, recreational and sports clubs and homes for retired people, the new strategic orientations are simply business oriented. “Social measures will be kept as long as required by law and to the extent it influences employees’ outcomes. Other policies and benefits will be smoothly dropped.” (TR20)
6.3.3.2.3. WORK ENVIRONMENT

TR2 has, at present, 3200 workers with a percentage of women in the workforce of 16% and the percentage of women in management levels is 30%. TR2 has a percentage of temporary employees working under a fixed term contract of 1.6%. Attrition rate is 4.0% while the absenteeism is 6.4%. The two characteristics found in TR1 labour force typical of long established public firms - a large group of people working 30/40 years for the company and a significant number of family relationships.

Due to the new strategic orientations and without a clear indication about the future of the company (public or private), a climate of fear and strain is perceived in the company: “we are all afraid of what the future will be” (TR23). Moreover, employees seem not to trust the top management anymore: “We do not know what the strategy is. They don’t tell us. We just receive orders and implement them but we don’t understand why.” (TR25) “It is very difficult to make contributions when we don’t know to where we go.” (TR22)

Due to this turbulent organizational climate, two major consequences were noticed in the work environment. First, TR2 is a clear case of the dominance of the general organizational climate relatively to the work-family organizational supportive, as suggested by Behson (2002b). Secondly, the importance of the supervisory support has been largely studied in the literature (e.g. O'Driscoll et al., 2003, Thomas and Ganster, 1995, Greenhaus and Parasuraman, 1994) but, in case of TR2, it is interesting to observe that supervisors and line managers have a fundamental role as “buffer on the toughness of the strategy and discretionary support to work-family life needs of their employees” (TR24). In line with literature, supportive practices, especially flexible scheduling and supportive supervisors, had been found to have direct positive effects on employee perceptions of control over work and family matters (Thomas and Ganster, 1995). Also O'Driscoll et al. (2003) posit that support from a supervisor may function as a buffering variable. Specifically, they assessed the extent to which the individual’s superior (immediate manager) was supportive of the person’s efforts to maintain a balance between work commitments and family life and protecting the individual from the strain associated with higher levels of work–family life conflict due to jobs having a abnormal profit-driven focus (Wallace et al., 1999).
6.3.3.3. TR3

6.3.3.3.1. HISTORY

TR3 is the leading Portuguese airline and, since 2005, a member of a major global airline group. TR3 transports over 9 million passengers and over 64 thousand tonnes of cargo and mail. It reaches 65 destinations across 31 countries.

TR3 was created in 1945 as the air transport section of the civil aeronautics public department. In 1952, the Portuguese Air Force was created and TR3 evolved from a public firm to a private corporation with mixed capital, the majority of it owned by the State. In the 60's, the decade of the colonial war, UT3 destinations were mainly the Portuguese colonies, from Goa in India, through Africa, till Rio de Janeiro, in Brazil. However, the colonial war also steered the demand for European destinations, among other reasons, because of people in search of better opportunities and others trying to escape military incorporation. The company reacted by opening up a multiplicity of European routes.

In 1975, after the April revolution, TR3 was led into the wave of nationalisations and became a public company. After that, internally marked by a very intense activity by the workers and their representative trade unions and externally affected by the oil and the aviation industry crisis, TR3 experienced troubled times.

In recent years, it is possible to recognize symptoms of recovery in the firm’s performance that involved investment and reorganisation in terms of human capital, business and markets. Considering the geographical positioning of Portugal, currently, the company aims to be a main international hub, representing a privileged platform of access to markets located in Continents other than Europe. Thus, the company pursuits a niche strategy, connecting Europe to a growing number of destinations located in Africa and in South America. At present, its recent performance and the consolidation of its strategic positioning has enabled to place the company in a more competitive situation. Thus and in line with recent measures aiming to solve the national economic crisis, TR3 is one of Portuguese public firms to be privatised in the near future.

6.3.3.3.2. CORPORATE SOCIAL RESPONSIBILITY

Regarding CSR and taking into account its recent economic history and its core activity, TR3 has defined a strategy for economic growth integrating responsibilities within social
and environmental spheres. Sustainability is a key component of TR3 commitments and goals. TR3 is a member of the WBCSD – World Business Council for Sustainable Development, GRI – Global Reporting Initiative and UN Global Compact.

The fact of being a big public firm with a notorious visibility is a key to the approach of TR3 to CSR. The social and business power of TR3 is driver for policies and benefits in the area of social responsibility, both external and internally. Indeed all the welfare policies identified in the previous public firms (TR1 and TR2) are found in TR3 and complemented by special benefits due to the nature of the jobs in TR3. The nursery, opened 24hours/7days, where the employees’ children can be let when parents are flying is a good example. The reasons for such a benefit are multiple: “It decreases absenteeism” (TR31); “It helps us to meet the demands of work and family responsibilities” (TR32); “It is a responsibility we have towards our employees, towards our clients and towards society. Ultimately, it is a question of citizenship.” (T30). Curiously, this sequence of reasons covers different drivers mentioned by Garriga and Mele (2004) – productivity and business profit, integrating social expectations and responsibility - and, according to these, the approach to CSR may be classified as instrumentalist, integrative and political, respectively. In the case of TR3, it is worth note that harmonizing time demands and expectations with regard to work and family roles is very complex for the flight personnel. In that sense, as highlighted by Carlson and Perrew (1999), the fact of not being home for a greater number of hours, or even days, is a source of stress and strain. They also found that social support may reduce perceived role stressors and time demands and, thus, indirectly decrease the negative impact of work-family conflict. When the firm poses such a social support as one of its responsibilities then it can be said that the political approach encompasses the other reasons. In line with this rationale, TR3 shall be considered as such.

6.3.3.3. WORK ENVIRONMENT

At present, TR3 has 10500 workers in Portugal, 30% constituting the flight staff. TR3 has a percentage of women in the work force of 43% and the percentage of women in management levels is 36%. TR3 has a percentage of temporary employees working under a fixed term contract of 4%. The attrition rate is 7.3% while the absenteeism is 7%.

While in TR2, the perceived organizational environment was determinant for the work-family environment attributes, in TR3, the work characteristics are the major antecedents
of high levels of work-family life conflict, as in the case of flight personnel. Indeed, employees perceived the organisation as being supportive, they feel fairly treated and they express their trust in top management. At the same time, the fact of working weekends, rotating scales, sometimes unpredictable schedules and being away for longer hours / days are actual causes for high levels of work-family life conflict. These characteristics are not new in work-family life literature (e.g. Shamir, 1983, Fox and Dwyer, 1999, Carlson and Perrew, 1999) but, in TR3, they play a critical role. “Not only, it is difficult to participate in family events and to be involved in building the family, but it is also difficult to have friends and a normal social life” (TR32). Once again it is noted the buffering role of the immediate supervisors (O'Driscoll et al., 2003), specifically, the role of family-supportive supervisors in moderating the relationship between work–family life conflict and psychological strain. “Supervisors have the autonomy to change the schedule in order to accommodate time and family needs we do have. And, in general, they are understanding and helpful.” (TR33).

6.3.4. UTILITIES SECTOR

6.3.4.1. UT1

6.3.4.1.1. HISTORY

UT1 was created in 1972. In four decades it became the largest transport infrastructure company in Portugal and one of the largest tolled motorway operators in the world.

UT1’s main business area is the construction and operation of tolled motorways, both in Portugal and internationally (United States and Holland). In addition to its regular area of activity, the Company has attempted to diversify its operations as much as possible by developing safety and environmental protection solutions. One of its most significant investments involves applied research and development regarding an electronic toll collection system that currently has one million and two hundred thousand users.

Soon after its constitution, during the revolutionary period of 1974, UT1 was nationalised and became a public company, first taking control of 40% of the company and eventually gaining a 90% share. However, between 1997 and 1999, the UT1 re-privatisation took place. The majority of the company’s shares were acquired by a Portuguese family group that remains in control of the company since then.
6.3.4.1.2. CORPORATE SOCIAL RESPONSIBILITY

Aware of the impact of its activity, CSR at UT1 is assumed in a long term perspective and focus on five fundamental vectors reflecting the most important areas of influence of the company’s activity: Innovation, Human Resources, Environment, Sustainable Mobility and Social Development. Like most of the other participating firms, UT1 participates actively in reference organisations and it is classified in sustainability rankings, such as, WBCSD – World Business Council for Sustainable Development, GRI – Global Reporting Initiative, UN Global Compact and FTSE4Good index.

With a high visibility and aware that as a motorway builder and operator, it is an important vehicle for the development of national economy, UT1 regards its mission as encompassing its responsibility towards society. An important feature observed in the company is that there are different labour groups with very diverse characteristics. For example, toll attendants and other operational staff are generally young and without academic background while professional technical staff has a different profile (an academic background, technological innovators, involved with a professional career). In addition, the fact that it is distributed geographically throughout the country hampers the introduction of generic social measures for all labour groups and to the whole company (e.g. day care for employees’ children) Taking into account these arguments, the company focuses its social responsibility in supporting local organizations. “The idea is to promote the local economy while at the same time it enables the most appropriate response to all employees, regardless of where they are located and what their social needs are” (UT10). As it is posed, CSR approach should be consider as a political approach in the sense explained by Garriga and Mele (2004) that such companies concern themselves with their power in society, a responsible use of this power and such consideration leads them to accept social duties and rights.

6.3.4.1.3. WORK ENVIRONMENT

UT1 has, at present, 2850 workers with a percentage of women in the work force of 28% and the percentage of women in management levels is 11%. UT1 has a percentage of temporary employees working under a fixed term contract of 10%. Attrition rate is 10.4% while the absenteeism is 5%.

Work environment reflect the singularities of different labour groups in the company. Due to the characteristics of operational activities in operating tolled motorways,
operational staff, working in the field, tends to be very young. This is also the group where the need to use temporary employment is more pronounced and the segment that contributes the most to the company’s global turnover rate. However supervisors are not so young and work for a long time in the company. They tend to have a hierarchical style of management which obstructs an open, flexible and family-supportive environment, confirming previous studies involving managerial styles and work-environment (e.g. O'Driscoll et al., 2003, Yang, 1993). “Supervisors are very supportive in case of illness, accidents or familiar emergencies. But, day-to-day, they do not make life easier. Some days, we have to be working 50 to 100 km away and there is nothing we can do to change the schedule in order to gain some flexibility” (UT15).

On the other hand, technical staff has a great tradition of innovative technology adoption. This leads to the fact that most of the flexibility measures (part-time, working from home, video-conferences) are available and, in certain groups, intensively used “If we have the technology, why not adopt new innovative work-family life solutions? I normally work wednesdays afternoon at home because the children are at home.” (UT12).

An overall trust in top management is perceived and people feel fairly treated and supported by the organization. However some distance between the top management and workers, associated with perceived continuous re-organizations, due to the introduction of new technological solutions and economic hardship, seem to be creating some tension in the work environment, in line with findings in the literature (O'Driscoll et al., 2003). “Management is moving people from one place to another but there is not a very clear strategy. These movements greatly interfere with the workers’ family lives and it is a significant source of strain and dissatisfaction” (UT14).

6.3.4.2. UT2

6.3.4.2.1. HISTORY
The first known use of electricity in Portugal occurred in 1878, when the royal family imported six voltaic arc lamps from Paris for a birthday celebration. In 1891 a company received a concession from the Lisbon Municipality to provide gas and electricity to the city, and small electrical installations followed in several buildings. Through the early 1900s municipalities entered into concession contracts with local companies for electricity distribution, while the government licensed power plants. In 1960 the various
companies that were supplying Portugal’s primary electric network merged into one company.

After the 1975 revolution, the government nationalized the country's power generation and transmission capabilities and the following year it created UT2 as a public-owned company to control the electricity monopoly in Portugal. One of the goals was to establish a single fare. It caused however a problem for the company as domestic rates were kept artificially low. Another pressing problem was its reliance on imports for power generation. These problems and a decade of negligence made the company accumulate a giant debt. During the 90’s, UT2 suffered a profound reorganization process. It became a holding company for 22 separate units. The restructuring gave the various components of the electricity sector more control over decision-making and daily operations, promoting better management and the company proved to be profitable for the first time in 1995.

The next step in UT2’s evolution was privatization. In June 1997, 30% of the capital of UT2 was sold. This first step was followed by five other privatisation stages. Currently, the state owns circa 25% of UT2 and a new privatisation phase is expected to occur. But the state has been wary of relinquishing too much control over Portugal's electricity system. Thus despite its minority holding, it retained a "golden share" that gave it veto power over major policy decisions.

Meanwhile UT2 continued to improve its efficiency (mainly by centralizing operations at the group’s level and further reducing its employees from 16,000 to 13,000), growth, diversification (covering other business segments in the energy sector such as gas and renewable energies) and expansion abroad (namely in Spain, USA and Brazil). Despite that since 1996 the government made clear efforts to make the electricity system more liberal and competitive, UT2 did not lose its predominant position and continues to be the indisputable Portuguese market leader and one of the Europe's major electricity operator.

6.3.4.2.2. CORPORATE SOCIAL RESPONSIBILITY

The UT2 commitment to sustainability includes its participation in a number of organisations that focus on the various components of sustainability like for instance the WBCSD – World Business Council for Sustainable Development, GRI – Global Reporting Initiative, UN Global Compact and FTSE4Good index.
As in the case of UT1 and according to Garriga and Mele categorisation (2004), a political approach to CSR is observed. UT2 considers that it develops its core business activities in a sector that is vital to economic and social development, the electricity sector. In addition to producing an essential good, UT2 recognizes that it also creates wealth for the community through its role as a major employer - “It is a question of citizenship: as a major Portuguese business group we are called to promote national and local development.” (UT22). UT2 shares the social and environmental responsibilities that result from its operations and contributes to the development of the regions in which it is present (e.g. rural sustainability initiatives, local social organizations sponsorship) - “We are responsible for a wide community of persons with very diverse needs” (UT20).

6.3.4.2.3. WORK ENVIRONMENT

UT2 has, at present, a total of 12000 workers from which 7200 work in Portugal. UT2, in Portugal, as a percentage of women in the work force of 20% and the percentage of women in management levels is 24%. UT2 has a percentage of temporary employees working under a fixed term contract of 0.6%. Attrition rate is 3.9% while the absenteeism is 3.6%. These indicators reflect the reality in terms of worker gender within the Group. It shows the prevalence of men in staff explained by the historical and socio-professional specificities of the energy business. However, the number of female workers in the Group has been increasing and the majority of women that have been hired during recent years are skilled workers and managers. Another important characteristic is that, in Portugal, the 50 and older age group makes up the largest worker group, with a total of 4,234 workers and the average age of the workers within the company is 49.

As an organization, UT2 is perceived by its employees as supportive. Employees express that they are fairly treated and that they trust UT2’s top management and strategy, according to definitions advance by Donovan et al. (1998) and Mayer and Davis (1999). However, employees strengthen the importance of informal work accommodations to family needs, as posed by Behson (2002a) and that sometimes contradicts the organizational message of flexibility and support to the individual engagement in work, personal and family activities. The inconsistency between organizational policies and the way certain middle managers behave is perceived by the employees and weakens the organizational stance. “Culture has not changed. The organization is promoting the change but mentalities are hard to change” (UT25) For example, there are no perceived
negative career consequences for people working from home but they know that they are expected to ask for such an arrangement not as a free option aiming the accommodation of work and family life demands but only when they have a serious reason for doing so. “If I have a problem with one of my children or my parents, it would be easy to stay and work at home. But it is not easy to make such an agreement for a long period and without a serious reason” (UT24). In fact, employees are expected to dedicate their energy and long periods of time to their professional work. “It is not a competitive and aggressive environment but we are expected to work for long hours.” (UT23).

6.3.4.3. UT3

6.3.4.3.1. HISTORY

UT3 is the largest Portuguese telecommunications company and, arguably, the largest Portuguese company overall.

The first telephone system appeared in Portugal in 1877, one year after Bell claimed the invention of the telephone itself. It consisted of a private telephone network set up for the royal family. Five years later, the Bell company installed telephone networks in the cities of Lisbon and Oporto. The concession for the two cities was transferred, some years later, to a new company, the Anglo-Portuguese Telephone Company (APTC). The installation of the first automatic exchanges, in Lisbon in 1930 and in Oporto in 1952, helped boost the company’s range, with 100,000 telephone lines by 1950. Nevertheless, connections between the two cities remained manually operated until 1961.

Building demand for telephone service led to the extension of the country's telephone network beyond its capital cities at the dawn of the 20th century. This task was handed over to the country's postal and telegraph public company, Correios e Telecomunicações de Portugal (CTT) in 1911.

Because of the Portuguese colonies, developing and operating its intercontinental system became an extremely attractive prospect for the private wireless telephone groups. Thus, Marconi, from the United Kingdom signed a contract with the government in 1912. Decades later, the need to ensure strong communications between Portugal and its colonies, which were more and more subject to growing nationalist unrest, helped make Marconi’s success a priority of the Portuguese government and transformed the telecommunications sector into a vital and politically sensitive sector. Therefore, in 1968,
British shareholders began to sell their stake in the company to the Portuguese government.

APTC, in the meantime, had continued investing in its networks in Oporto and Lisbon, bringing the total number of lines in those cities to more than 312,000 by the mid-1960s. Yet, in 1967, the government took control of its operations and placed them under a newly formed, state-owned company, Telefones de Lisboa e Porto (TLP).

Year after year, the government sought to streamline the country's three-headed telecommunications industry, pushing for a merger between the firms. As all the companies were already state-owned no major development took place during the revolutionary period of 1974.

Reform of the country's telecommunications industry began in earnest after Portugal was accepted into the European Community in 1986. That reform gained momentum in 1992, and by 1994, the fusion of all state-owned telecommunications firms resulted into a single, national telecommunications powerhouse, UT3.

Through the remainder of the 1990s, the Portuguese government carried out a privatization program for UT3, in several steps. By the end of 2000, the Portuguese government had sold all but the so-called "golden shares".

UT3 in the meantime began investing heavily in new technologies, such as mobile telephone services starting in the early 1990s and internet access services in 1995. UT3 also had begun to expand internationally. For this, the company targeted the world’s Portuguese markets, especially the Brazilian telecom market. In 1998, with a Spanish partner, they entered Brazil and, by 2004, they widen its influence to the whole South American market. Currently, UT3 is present in 12 countries, 4 continents serving 85.5 million customers.

6.3.4.3.2. CORPORATE SOCIAL RESPONSIBILITY

UT3 is an active member of organisations related to CSR performance: the GRI – Global Reporting Initiative, UN Global Compact, FTSE4Good index, ETNO - European Telecommunications Network Operators and BCSD Portugal - Business Council of Sustainable Development. Recently, UT3 entered the Dow Jones Sustainability World Index.
“Communication and information technologies are a powerful resource to bring people closer together, dematerialise day-to-day life and contribute to improving everyone’s life” (UT30). Therefore, UT3 believes that its activity contributes to benefiting society, enabling value sharing with the community, environment and shareholders. In accordance with that, “one of our strategic commitments towards a sustainable future is the building of a more digitized society that will allow enhanced information access and will consequently promote knowledge - indispensable for progress and for a more responsible citizenship” (UT31). As it is posed UT3 CSR approach is a typical political approach, according to Garriga and Mele categorization (2004).

However, it is not seen as such by employees. The perception is that “from a public company with a very strong social mission, we have changed to a company that has to be highly profitable. That is now the ultimate goal.” (UT32). This perception places the firm as adopting a more instrumental strategic approach, mainly driven by profit.

But, reality shows that an effort is being made by the organisation in order to continue to answer to social needs of their workers. “Traditionally, most of our policies were very paternalist. But, on the other hand, focusing only on the professional challenge, career progression and satisfaction at work, even in a state-of-art technological environment, is not sustainable at the long-run. So we are trying to find equilibrium between the two stances by listening and responding to our people and their needs.” (UT30) This evolution suggests that UT3 is changing its position to a more integrative approach.

It also proves that the way the firm sees its role in business and society is dynamic and dependent on variables like the economic context, the strategy adopted by top management and the attributes of its labour force, as it has been advocated by some authors (e.g. Wood, 1991a, Swanson, 1995).

6.3.4.3.3. WORK ENVIRONMENT

UT3 has, at present, a total of 23000 workers from which 11000 work in Portugal. UT3, in Portugal, as a percentage of women in the work force of 36% and the percentage of women in management levels is 32%. UT3 has a percentage of temporary employees working under a fixed term contract of 27.0%. Attrition rate is 1.4% while the absenteeism is 3.3%. It’s worth saying that the average age of the employees is 40 years
and the seniority average is 14.5 years. This is explained by the fact that, unlike UT2, UT3 has recently suffered a huge process of pre-retirement inducement.

The percentage of temporary employees working under a fixed term contract is only apparently high because it can be noticed that it is similar to UT1 and Retail firms. This indicator is also in line with to the fact that the percentage of employees with permanent contract with university training is 50% while the percentage of employees with fixed-term contract with basic or secondary academic training is 85%.

Work environment at UT3 has definitely changed after recent reorganisation processes - “The massive staff pre-retirement process paved way to a modern competitive and aggressive organisational culture” (UT32). This leads to the perception that many employees are not taking advantage of social benefits offered by UT3, due to fears of negative career consequences, in line with what was suggested by Thompson et al. (1992). Time demands or expectations on how employees prioritize their work and family commitments contradict the availability of flexible policies: “Working long hours often serves as a prime indicator of commitment and productivity.” (UT34). Even for managers, showing family-supportive attitudes and emotions may undermine his/her ability to show total commitment to the organization (Bailyn, 1993), resulting in negative performance evaluations and rewards (Perlow, 1995). In general, literature supports the idea that utilizing work-family benefits negatively affects career advancement, especially managerial ones (e.g. Lewis and Taylor, 1996, Perlow, 1995) and UT3 is an example of such situation. “Many employees desiring to balance work and family are forced to choose between “fast track” career advancement and the “mummy track”. From my manager point-of-view, it is impossible to be engaged in other roles besides the professional one and progress in this firm” (UT33).

6.4. INSTITUTIONAL PATTERNS

The analysis of the 12 Portuguese firms revealed that different social policies and practices are implemented in medium-large Portuguese firms and that they do so for different reasons. In addition, some patterns are observed:

- Firms with a high visibility, open to technological innovation, geographically distributed throughout the country and aware of its role as a vehicle for the development of national economy (e.g. BK2, TR3, UT1, UT2, UT3) tend to concern
themselves with their position in business and their power in society and its inherent responsibility. This leads these firms to accept social duties or, at least, to participate in a certain form of social cooperation. In most of the observed situations, the corporate citizenship (Matten et al., 2003) framework is applicable to this stance and the approach is categorized as political, in the definition of Garriga and Mele (2004). Corporate citizenship focuses on rights, responsibilities and possible partnerships of business in society. Depending on the firm, these activities are deemed either as pure corporate philanthropy or as certain responsibilities assumed towards the local community.

- State-owned firms, such as the transport firms described above (TR1, TR2), stress the importance of offering a public service. These firms also posed their CSR approach as driven by political reasons in the sense Garriga and Mele (2004) define them but social responsibilities of businesses arise from the amount of social power that they have (Davis, 1960, Davis, 1967). Among these responsibilities are those normally provided by the state and that they, subsidiary, take upon. To a certain extent, and according to Agle et al. (1999), they balance the interests of various stakeholders of the firm (namely, the state, the public and the workers).

- Retail firms (RT1, RT2, RT3) tended to be Integrative in their approach to CSR, according to the definition by Garriga and Mele (2004). In line with this attitude towards social responsiveness, these firms emphasized and demonstrated to have processes of response to social and political issues which may impact significantly upon it, like, for instance, absenteeism (Wartick and Rude, 1986).

- In firms where some inconsistency, lack of communication or transparency is noticed by the employees (e.g. TR2, BK1), the institutional approach to the CSR tend to be perceived by these as Instrumental, as defined by Garriga and Mele (2004). Moreover, when employees regard the performance appraisal system as unfair, trust in management (Mayer and Davis, 1999) and the perception of the organization’s supportiveness (Behson, 2002b) are weakened and, ultimately, all social policies are perceived as instrumental.
• Globalization may push stakeholder management practices towards a normative paradigm, which is consistent across all the locations in which the firm operates (Donaldson and Preston, 1995) as it is the case of RT2.

• Organizational supportiveness is perceived and valued by employees of firms adopting a Political approach to CSR. Inversely, managerial support and proximity can help to overcome a perceived lack of organizational supportiveness. This social support balance between organizational and direct management support was already suggested by Behson (2002b).

6.5. CONCLUSION

In this chapter, the main findings of the research regarding the corporate social responsibility practices and work environment of the firms were presented. In line with the literature, these findings showed that distinct ideas on the role of the firms towards business and society lead to distinct approaches to corporate social responsibility and to work-family life issues. They also showed that there was a difference between the way such approaches were posed by institutions and the way they were perceived by their employees.

Findings resulted from the triangulation of the research methods implemented. Thus, they were based on the results of the survey and illuminated with information gathered during the interviews. These interviews expressed not only the institutional perspective conveyed by the Human Resource managers but also the perceptions of the employees that were interviewed. In addition, the framework constructed in the methodological chapter proved to be a valid lens in the interpretation of the collected data.

In the next chapter, analytical explanations for the findings (e.g. the differing perceptions) will be explored, linking the analysis to the reviewed literature and discussing the findings in order to advance possible answers to the formulated research questions (Gibbs, 2007).
CHAPTER 7. ANALYSIS

7.1. INTRODUCTION

Through a description of the findings regarding the participating firms and their employees involved on the survey, last chapter has shown that different social policies and practices are implemented in medium-large Portuguese firms and that they do so for different reasons.

In this chapter, patterns of the availability and accessibility of work-family life policies based on the survey will be analyzed. Afterwards, analysis of the cultural attributes and to what extent they promote a Family Supportive Culture will be discussed. This analysis will be based on the definition of patterns concerning specific dimensions of work-family life culture. These dimensions are directly linked to the reviewed literature on work-family life and to the research design presented early in this research.

Further on, a discussion of the findings undertaken in the previous chapter will guide the analysis to the kind of factors which can be viewed as drivers or primary forces behind the adoption and the perception of the value of work-family life policies. These drivers should not be seen as direct causal antecedents of the implementation of work-family life policies or of the development of a Family Supportive Culture but as a collection of attributes that serve as a launching pad to spur them. Moreover the combination of such attributes is correlated with the implementation of different policies. This analysis will be carried out through relationships analysis and factor analysis. Factor analysis is an adequate form of exploratory analysis in the sense that it tends not to be based on theory but it is more focused on either inducing evidence of stated hypotheses or generating new ones (Hamilton, 2006).

From the analysis carried out so far, it will stand out that a gap exists between the organisation and the employees’ perception of the existence / absence of work-family life policies as well as the perception that the work environment is family-supportive. This gap will be calculated and analyzed.

At that stage, findings from the corporate social responsibility research will be added and the analysis will proceed with the triangulation of the findings from the core themes
(work-family life and corporate social responsibility) in order to enlarge the focus and to analyze shared situations (Flick, 2004).

During the field work, a number of adjacent themes, more or less expected, were revealed and recurrent. These were themes like, for instance, the effect of being in an economic recession period. So, at the end of the chapter, a brief analysis will be made.

7.2. WORK-FAMILY POLICIES PATTERNS

The option for a set of firms featuring work-family policies made possible to highlight some patterns on the implementation of such policies in the surveyed firms, as presented in Figure 12 and Figure 13.

![Figure 12 – Work-Family Policies (Job Flexibility) – organizational perspective](image)

Figure 12 – Work-Family Policies (Job Flexibility) – organizational perspective

Regarding flexibility, the implemented policies tend to facilitate the adoption of a personal working schedule. Most of the surveyed firms have a flexible working schedule (P1 in Figure 12), often based in a core-time period. Sometimes in production and front-office, it is not possible to have such flexibility. However, in such cases, some firms (e.g. bank institutions, RT2 and TR1) facilitate switching jobs internally so the workers can adjust the career with the family life cycle care needs.
The situation with part-time working is complex (P2 in Figure 12). Few firms offer it not only because, normally, it represents more costs to the firm (two people sharing the same job) but also because the workers do not ask or adhere to such policy. A recurrent reason pointed by the interviewees is that Portuguese family budgets are scarce and it is not possible for them to reduce the salary.

Some of them also expressed that they think that if they choose such a work arrangement, they would receive less by the same amount of work. Others also said that those who work-part time are normally negatively affected in what concerns promotions and performance evaluation.

The same rationale can be applied to similar policies aiming flexibility such as reduced journey in exchange for wage reduction (P3 in Figure 12) or time compensation in some other occasion (P4 in Figure 12).

Also other policies which involve investment by firms are not very frequent. A good example is the fact that while paid maternity (P5 in Figure 12) or paternity (P6 in Figure 12) leave beyond the legal minimum are not common, leave of absence to take care of a family member (P7 in Figure 12) it is a possibility in most of the surveyed firms. The difference is precisely the needed investment because “from the point-of-view of the work organization it is much easier to plan a maternity leave than normally a absence due to a sudden and unexpected situation with a family member” (RT20).

The possibility of working at home (P13 in Figure 12) and video-conferencing (P14 in Figure 12) are also a possibility because they are considered to be a “win-win policy because it reduces the operational costs of the firm and reduces the worker need for commuting” (BK30). “However it requires different management skills and attitudes that are difficult to implement. For instance, people have to be managed and evaluated based on tasks and objectives, managers need to trust their team. It is an organizational change process that takes time” (TR10).
Figure 13 – Work-Family Policies (Support, Services and Benefits) – organizational perspective

Regarding Benefits, accident insurance and allowance for lunch (P27 and P31 in Figure 13) are exceptions that have to do with the Portuguese labour regulation.

Life insurance, health care programmes including the family members and retirement plans (P26, P28 and P30 in Figure 13) are quite popular benefits. In fact, a few of the surveyed firms have their own health care systems and used to have their own pension fund. Today, most of these pension funds have already been assumed by the state. It is case of BK1, BK2 as well as all the public or recently privatized enterprises, namely all the firms included in the transport and utilities sectors.

The implementation of services, such as daycare institutions, either for children (P22 and P25 in Figure 13) or senior citizens (P24 in Figure 13) or fitness centres (P23 in Figure 13), depends greatly from firm to firm. “It has primarily to do with the labour force. For example, in a firm where the average age is 30 years, the social services will be quite different from a firm where the average age is 49 years” (TR20). A good example of this rationale is the in-site daycare centre of TR3 opened 24hours/7days a week, a schedule directly related to the needs of the flight personnel.

The majority of the policies related to counselling and training on subjects that can interface with work and family life (P15 to P2 in Figure 13) are not extensively
generalized. The only exceptions are personal counselling (P16 in Figure 13) assuming that is part of the supervisor-subordinate relation and training on time and stress management (P20 in Figure 13) though mainly because these are crucial management skills.

From the employees’ perspective (Figure 14 and Figure 15), the perception of the implementation and the access to work-family life policies in their firm differs from the one transmitted by the organization.

In general, the staff’s answers to the policies’ survey follow the same patterns described above. However they are not precisely the same. In fact, when policies are not formal and extensively communicated, it is difficult for some workers to know if they are available to most of the staff or only to some employees and so, to a certain degree, it is comprehensible the different answers. However it is not the case when someone says that some policies are not available in the firm when the Human Resources Manager states that they exist.

The literature identified some causes were given for the ignorance of the existence of certain policies or for the fact that it is not clear how to access to them. It can be a question of lack of communication (Allen, 1992) but it can also be a cultural matter. A non family-supportive culture establishes barriers to internal communication and the attitude of managers can constitute a hindrance to access them (Allen, 2001).

According to the survey, the staff results show a higher percentage of answers stating what policies do not exist in the firm. For example: organizations answered that, at least some workers, do have access to flexible work schedule and to the possibility of working part-time (P1 and P2 in Figure 12) and a considerable percentage of workers from the set of the surveyed firms (10% for P1 and 39% for P2 according to Figure 14) said that, in their firms, there are no such policies. A deeper analysis of such facts will be explored further on.
Other notable examples fundamental for career and family decisions and that workers perceived them quite differently from the organization are the possibility of working at home and keeping job perks after a long period of absence. In the first case, 58% of the organizations said that all the workers had that possibility, according to P13 in Figure 12, while no worker admitted that they worked in a firm where everyone had that possibility and 39% of them said that, in his/her firm, nobody had that possibility (P13 in Figure 14). With respect to the latter, 92% of the organizations said that everyone would keep job perks after a long leave of absence (P10 in Figure 12) while only 38% of the workers admitted so (P10 in Figure 14).
Concerning the support, services and measures, it is worth to notice the availability of a daycare service, either in-house or subsidized. The difference found in the distribution of the answers, according to P25 in Figure 13 and in Figure 15 is explained because of the multiple implementations of such policies that were indicated in the interviews. For example, BK2 has a kindergarten in one of its facilities. From the organization’s point-of-view, every worker has the possibility to have his/her children there (BK20). From the workers point-of-view, as the kindergarten has a limited insufficient capacity, they considered that only some workers do have access to it (BK22).

Personal / Family counselling (P16 in Figure 13 and Figure 15) was also a policy that led to different interpretations. Most of the human resources managers from the surveyed organizations considered it to be part of the personal coaching that managers and supervisors do to their subordinates. Thus 92% of them said that everyone had access to such policy. On the other hand, employees thought of it as being a professional service offered by the firm and so the distribution of the answers reflects this concept. Some employees, when questioned, answered they didn’t feel comfortable talking about some personal and family problems and discuss them with his/her supervisor. They stressed
that it “depended on the supervisor’s attitude and support towards such questions and the interference of such problems on the day-to-day work” (BK12).

7.3. WORK-FAMILY CULTURE PATTERNS

Work-Family Culture was observed in the scope of the survey through the cultural hindrances (C1 to C3), promoters (C4 to C6) in Figure 16 and Figure 18 and managerial attitudes (C7 to C8) in Figure 17 and Figure 19.

Each question contributed to the characterization of one dimension of the family-supportive culture as defined in previous chapter (CHAPTER 5): Time demands and expectations, Negative career consequences and Managerial support.

These cultural components were also addressed in the interviews aiming to inform on the results.

In general, the results from the organizational perspective were the expected results from firms that see themselves as having a strong family-supportive culture (Allen, 2001). There are no hindrances present. On the contrary, it is a culture that facilitates the juggling between work and family life decisions. There are no stretching time demands and no negative career consequences if employees reject a promotion due to family reasons, neither they are seen as less committed if they choose to take a leave or reduce the working-hours to take care of a family member.

In the majority of the surveyed firms, not all managers are sensitive to the importance of work-family life balance and also they are not an example on such subject. However, in most of the firms, most managers, if not all, have a supportive attitude.

![Figure 16 – Work-Family Culture - hindrances and promoters – organizational perspective](image-url)
This panorama differs significantly from the employees’ results.

From the staff’s perspective, the presence of cultural hindrances is evident. Occasionally some of the employees are expected to take work home all the time. During the interviews some recognized that they are expected to be “24 hours available” (e.g. UT13) and others have expressed the idea that, “if they do not take work home, in order to accomplish the targets, projects and tasks they were assigned, they would have to stay much longer in the firm” (e.g. UT12). For some firms, from the survey results and the interviews it became clear that it is considered normal to suffer negative career consequences if employees reject a promotion due to personal and family reasons. Also for some who experienced a reduction in the working-hours in order to take care of the children while they were small (BK11 and TR22) or, in one case, to take care of a father with a cancer disease (UT21), the perception was that they were seen as less committed to the work because of their option. This perception regarded not only the supervisor but also their peers in general.
Most of the employees do not know all managers in the firm, so they avoid stating a radical perception towards every manager in order not to be unfair. Accordingly, in most firms, they recognize that there are some managers, or even most of them, that are sensitive to the importance of a good balance between work and family life. However they link this attribute to the personality of each one of the managers and not to a cultural trait of the firm.

![Figure 19 - Work-Family Culture: Managerial Attitudes - Staff Perspective](image)

### 7.4. FAMILY-SUPPORTIVE CULTURE

The dimensions observed were the ones suggested by the literature (Thompson et al., 1999):

- time demands or expectations on how employees prioritize their work and family commitments,
- perceived negative career consequences associated with utilizing work–family benefits or devoting time to family responsibilities and
- managerial support and sensitivity to employees’ family responsibilities

Formal or informal norms about the number of hours employees are expected to work, how they use their time and work-family life options and cultural norms on managerial attitudes towards the above can clearly hinder or promote the ability of employees to meet demanding responsibilities at their work and family lives (Bailyn, 1993).

Based on the survey answered by the employees, a calculation of these dimensions (Appendix D. Survey – Staff results) was carried out, the results are illustrated in Figure 20 and some conclusions become clear when observing the figure.
Firstly, there is an obvious difference between firms from Retail and Wholesale sector and firms from other sectors. In fact, in this sector, a high number of employees work shift hours and “though less flexible, this schedule has the major advantage that, normally, one does not work more hours and does not take work home” (RT34).

On the other hand, employees working on other economic sectors can enjoy more flexible schedules but they are also supposed to spend long hours at the office. Though some of the participating organizations have already altered the way they define, measure and appraise performance towards goals and targets evaluation, working long hours often continues to serve as an informal cultural prime indicator of commitment and productivity, like in traditional labour models.

Also, it is worth to note that, in general, managers are not considered to be unsupportive by their employees. Dimensions perceived as organizational (time demands and negative career consequences) were more penalized than managerial support which was perceived as an interpersonal dimension. “I do not complaint about my manager. I think he supports us or, at least, he does what he can do.”(BK12) and “He is not an example of effectiveness in managing both his career and his family. Work always comes first. But
within this organization managers cannot behave otherwise” (TR34, TR25, UT22). This conclusion is not new and reinforces previous studies according to which showing family-supportive attitudes and emotions may undermine an employee’s ability to show total commitment to the organization (Bailyn, 1993).

Furthermore literature supports the idea that utilizing work-family benefits negatively affects career advancement, especially managerial ones (e.g. Lewis and Taylor, 1996, Perlow, 1995) and this perception is also present in most of the participating institutions. Normally it is only a perception as most of the workers have not used such benefits. However, the fear of negative consequences does inhibit them in common situations. “If I had a serious problem, for instance with one of my kids, I would not mind with the negative consequences. But I know that if I agree a different schedule with my manager I would be seen as less committed to work. Surely I would be by-passed in career progression” (BK14),

Finally, an interesting finding is that overall trends of the various family-supportive culture components are similar (see Figure 21).

![Figure 21 - Dimensions of Family-Supportive Culture per Organization – Trend lines](image-url)
In conclusion, though it is possible to identify and analyze different variables of the family-supportive culture construct, they seem to have a consistent behavior when observed all together. This consistency in the way workers perceived the different components of the culture emphasizes that culture is a major construct that can be seen as one unique attribute of the firm.

7.5. INSTITUTIONAL DRIVERS

7.5.1. RELATIONSHIPS ANALYSIS

The correlation matrix of the organizational data suggests some interesting relationships (see Table 15).

Correlation measures the extent to which two variables move together in the same direction. This analysis contributes to the understanding of whether two variables are associated with one another. It is important to note that when two variables are correlated it does not necessarily imply that one causes the other, it just implies that the two variables move in the same (or opposite) direction (Hamilton, 2006).

Correlation coefficient is a numerical definition of the relationship between two variables and it falls in the range between -1 and +1. If the correlation coefficient is calculated to be +1, there is a perfect correlation, if coefficient is -1 the variables are said to be perfectly inversely correlated. The closer the coefficient is to 0, the less pronounced the relationship is (either positive or negative) between the two variables.

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Table 15 – Organizational data - Correlation Matrix
Some of them are more or less expected and natural. For example, there is a positive high correlation between the three variables: control, geography and total size of the firm, meaning that the biggest firms are global firms, privately owned. Moreover, these same variables, which together describe the macro-configuration of the firm, are clearly related to the existence of work-family life policies (owfp). The greater and global the firms the more policies can be found and accessible to more workers. This conclusion reinforces the fact that, when characterizing the firm in what concerns social policies, it is important to consider not only the local site, in this case Portugal, but to expect the influence of global policies of the firm (Ngo et al., 2009, Davis et al., 2010). This fact was confirmed during the interviews with management from BK3, RT2 and RT3 (respectively, BK30, RT20 and RT30). They stated that most of the policies implemented at the local site were tailored from global ones. This also explains why the variable concerning the size of the firm in Portugal (portsize) is not correlated to the work-family life policies.

The presence of women in the staff and in management places are variables that are worth to be analysed in the scope of the surveyed organisations.

The percentage of women in the staff is correlated with the firm’s macro variables and, accordingly, with the existence of work-family policies. In fact, during the interviews, it was noticed that in multinational firms there were diversity policies set-up that included execution targets for percentage of women in the staff. Surprisingly, the percentage of women in the staff seems to be correlated not with the total size of the firm but, somehow, with the size of the firm in Portugal.

A possible explanation can be found when observing the graphs on Figure 22.
The percentage of women in the staff differs from Sector to Sector, independently of the size of the firm. Retailing is the Economic Sector more women-intensive and Transports the one that employs, in percentage of the total labour force, fewer women. Financial institutions are typical tertiary activities with a percentage of women near 50% and Utilities with a percentage a little bit lower as its activities are a blend between services and distribution (more men-intensive).

Interesting is also the distribution of the percentage of women in management places. First it is worth analysing the large gap in Retail firms. The typical case is RT1. This firm, in its stores, employs mostly women with the basic academic education. “It is an hard job because of the long hours and physical demanding, every day but women tend to accept such jobs as they have fewer employment choices than men, especially outside the great urban centres” (RT12). Still men are more often promoted to supervisors and managers than women (RT12 and RT13). Secondly, it is also worth stressing the reverse case of Transport firms. The Transport firms are traditionally men work environments. They have been gradually employing more women. However most of the women employed during the last years are graduated and work as corporate managers in the head offices.

According to the surveyed organisations, the absenteeism is negatively related to the implementation of work-family policies, meaning that the more policies are implemented in the firm less absenteeism is noted, in accordance with the studies carried out by, for instance, Kossek and Ozeki (1998) and Frone et al. (Frone et al., 1992b).

The attrition is strongly correlated to the size of the firm in Portugal. The main reason is the exceptionally high attrition rate presented in the two biggest firms in Portugal: BK2 and RT1. The first is due to the difficult period and the major organizational change process the bank is experiencing. The latter is due to the distinctive Economic Sector in which it works. “Salaries of super and hypermarkets’ workers are quite low and the job is hard, especially during the first years. So if another firm offers them a little bit more, they quit. They do not consider all the social policies they have and all the extra benefits they receive” (RT14).

The organizational data also reveals an apparently awkward fact: the family-supportive environment as described by the organisation it is not correlated to any of the other variables. But, as the existence of work-family life policies was a prerequisite for the set of participating firms, it means that all surveyed firms had already some attributes
characteristic of a family-supportive environment. The existence of such attributes exacerbated by the vision of someone representing the organisation made all cultures look similar and no correlations were noted.

However when, instead of the organizational indicators concerning the work-family policies and culture, the mean of the same indicators from the staff’s perspective (Table 16) it is considered, conclusions are different.

By observing this data and as it is expected, the existence of work-family life policies is highly correlated with the perception of a family-supportive environment, reinforcing the idea expressed by several authors (e.g. Starrels, 1992, Thompson et al., 1999, Allen, 2001). And, consequently, all the considerations made above concerning the work-family life policies, its organizational antecedents and consequents are also applicable to the work-family environment.

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Table 16 – Organizational data - Correlation Matrix (using mwfp and mwfc)

Alternatively to the correlation calculations run so far and because there is a set of continuous measures, an analysis of covariance should be used instead (see Appendix F. Organisation - Analysis of Covariance). Covariance statistics also indicate the direction and the strength at which two variables move together (Hamilton, 2006). Results indicate whether the relationship between other variables and work-family life policies and culture are statistically significant. This is important in terms of understanding these latter variables because it reveals which of the other variables actually contribute to model them. The conclusion from the analysis carried out reinforced that not only the included variables where statistically significant but that they were related either to work-family life policies or culture in the way it was previously analysed.
Summarizing, the above analysis highlights two key contextual constituents:

- Local context - related to the local characteristics of the firm (local size and demographic composition of the workforce).
- Global context – concerning the macro-configuration of the organization and also including formalisation of work-family policies and culture.

### 7.5.2. FACTOR ANALYSIS

This same analysis is confirmed by a simple factor analysis ran on the organizational data and presented on Appendix H. Organisation – Factor analysis.

Factor analysis, as other analysis like for instance cluster analysis, can be thought of as a form of exploratory analysis in the sense that it tends not to be based on theory but it is more focused on generating hypotheses. It is important to note that this type of analysis is useful in determining the factors associated with membership, but is does not necessarily give insight on the causes of group membership.

Factor analysis examines the correlations between the items and it shows if there is a significant overlap amongst various subgroups of items. As a result, a small number of factors that explain most of the variance observed in a specific phenomenon is computed.

Factor analysis implies the existence of a smaller number of non observable underlying dimensions (factors) which explain the behaviour of the original variables. In the end, a reduced amount of data is expected, without loss of too much information. The application of factor analysis implies that there is a significant correlation between variables. If the correlation between the initial variables is not significant, it is improbable that the variables will present common factors. The most frequent method used for extraction of the factors and the one used in this research is the principal components analysis method (Hamilton, 2006).

According to the factor analysis, surveyed organisations can be grouped as Figure 23 shows.
Figure 23 – Organisations characterisation according to context

It is important to stress that these scores presented in the graph do not represent a scale but they pretend to aggregate attributes of the organisations in order to categorize them. Thus,

1. RT2 and BK3 are large, multinational organisations, privately controlled with well-built work-family life policies.

2. TR3, BK2, RT1 and UT3 are large Portuguese firms with a workforce based on women, non-permanent contracts and a high attrition rate. Although not a multinational firm, UT3 presents a set of work-family policies that puts it in a position near category 1.

3. Though it is also a local site of a multinational, RT3 is not in category 1 because the composition of its workforce is strongly similar to category 2, meaning that it has adopted a local pattern.

4. The last group covers the Portuguese firms, public or private, of medium size with respect to other major ones and that do not present a workforce composition as the one described in category 2.

This analysis reinforces the view that helping workers balance work and family responsibilities is not just a matter of benefits and formal work-family policies. Rather, it also depends on the characteristics of jobs, within the industrial sector and within the firm (Berg et al., 2003). Indeed researchers recognize that the nature of jobs, the workplace environment, and more generally, the culture of the workplace can have a significant impact on the ability of workers to balance their work and family lives.
Individual and family characteristics make people more suitable into particular kinds of organizations and jobs. But, along with individual and family characteristics, industrial sector, organizational and job characteristics, affect the extent to which the workplace provides support to help people deal with their family lives. Indeed industrial sector of employment (Tausig and Fenwick, 2001) as well as the structure of firm ownership (family owned business, non-family owned business and state control business) may have effects on the presence of both scheduling alternatives and schedule control.

Some types of jobs and workplaces make it more or less likely that workers will be able to fulfil both their work-related responsibilities and their family obligations. For example, workers who have considerable control over the scheduling of their work activities and whose workplaces provide them with opportunities for flexible time and assistance with child or elderly care should be better able to balance their work-family lives than workers who do not work in jobs or workplaces that give them these advantages (Berg et al., 2003). In this research this is clearly the case of the banking institutions as well as the ones in the utilities sector.

Inflexible scenarios in what concerns to scheduling alternatives can be found in firms operating in retail and transport industries and, though not covered in this study, manufacturing industries. Traditionally these are work environments based on intensive and indiscriminate labour - “many people working hard and working in shifts” (Berg et al., 2003). Moreover, these individuals have, in general, more extensive and complicated family obligations - such as single parents or members of dual-working all hours couples – what makes them apt to have greater difficulty in balancing their work and family lives than single persons, or those who are married to a full-time homemaker (Blyton and Jenkins, 2011). In particular, Staines and Pleck (1983) pointed out that working involuntary nonstandard shifts (i.e., nights, weekends, rotating) when the worker has no choice as to time or days worked, was associated with difficulties in scheduling family activities and with less time spent in family roles.

Even in such work environments, some differences can be noticed when firms create a high-commitment environment - characterized by high-performance work practices, intrinsically rewarding jobs, and understanding supervisors, as for RT2 and TR1 firms – it positively influences employees’ perceptions that the company is helping them achieve this balance (Greenhaus and Beutell, 1985, Voydanoff, 1988, Osterman, 1995).
On the other hand, many workers on inflexible, but regular, schedules may achieve balance through the regularity of these schedules—especially if that schedule is the standard Monday–Friday daytime. In what concerns schedule regularity allows for planning as well as helping differentiate work from personal and family time. For example, this would account for the high levels of balance among state sector workers, who typically work this standard shift (Tausig and Fenwick, 2001), like the headquarters administrative workers from the participating stated owned firms.

Economic sectors based on the knowledge workers are typical examples of more flexible work environments. In such environments, though sometimes it is difficult for employees to establish a boundary control between work time and family time, the implementation of work-family life policies may ease to balance different scopes of their life (Perlow, 1998).

Hochschild (1997) suggests a contrasting view, arguing that knowledge workers, working in high-performance, high-tech workplaces will choose to spend more time at the workplace than in the family. She maintains that the supportive and participatory workplace has become a haven from the stresses and strains of family life such that “work becomes home and home becomes work” (which is the subtitle of her book). As a consequence, she hypothesizes that working in high-commitment work organizations produces a time deficit in family life, making it more difficult for people to balance their work and family lives. This would be reflected in a negative relationship between organizational commitment and work-family balance which could explain the case of BK3.

Finally, in what concerns family owned businesses, literature suggests that they have unique inherent attributes derived from the overlap of family, ownership and management style, which results in fairer treatment for workers (Davis and Tagoiuri, 1983) and in greater commitment and loyalty to employees (Birdthistle and Fleming, 2007). However they usually tend to not develop formal work-family life policies, being more informal and considering each employee’s case separately (Landsberg, 1999). This means that work-family life practices are more discretionary and the access to them greatly depends on the supervisor’s attitude towards them (Guillén et al., 2002).

The existence of such factors is not a novelty (Spector et al., 2007, Spector et al., 2004), however it reinforces the idea that the firm’s identity, including its mission, values and
culture should be deepen and carefully adapted in order to fit its workforce (Guillén et al., 2002). It is not replicable sightlessly. And vice-versa, the workers of a firm tend to present characteristics that match the firm’s identity (Kanter, 1993). It is a process of mutual adjustment and that ultimately defines the distinctive character of the organisation.

7.6. INDIVIDUAL DRIVERS

7.6.1. RELATIONSHIPS ANALYSIS

The analysis of relationships in staff’s data, see Table 17 – Staff data - Correlation Matrix, conducted to some interesting conclusions. This analysis of correlation coefficients was corroborated by the analysis of the covariance (see Appendix G. Staff - Analysis of Covariance).

The main conclusions that can be stated are that the existence of work-family policies and a supportive environment are correlated and that satisfaction at work is related to the firm’s work environment.

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Table 17 – Staff data - Correlation Matrix

That fact is not surprising as any measure of job satisfaction comprises attitudes towards the team, peers, supervisor, the organisation and the work itself, meaning that apart from the tasks one performs the organizational environment is also important (Allen, 2001). Interesting is that the correlation is stronger with respect to culture than to policies. A possible explanation will be that formal policies are quite important but their actual usefulness is potentiated only when there is a sensitive climate (e.g. Thompson et al., 1999, O'Driscoll et al., 2003).
On the other hand, satisfaction with personal and family life seems not to be correlated with none of the presented variables. A possible explanation is that people “feel and think of this scope of life as private and separate from work life” (UT21).

From the observation of the graphics in Figure 24, it is also suggested that an exception is noticed concerning people fully satisfied in both scopes of life. For such people, the climate and culture lived at work, assumes an importance greater or equal to the policies implemented. This emphasizes the fact already mentioned that work and family life are not independent realities and that they do influence each other (Carlson et al., 2006, Carlson and Perrew, 1999). Normally one is fully satisfied when one is happy with his/her life as a whole and the different arenas reinforce and do not obstruct the fulfilment of each other.

![Figure 24 – Work-Family Life Policies and Culture versus Satisfaction with Work and Pers/Family life](image)

On the other hand, the impact does not indicate that having a perfect supportive-environment at work can be the reason to be fully satisfied at work or with the personal/family life. It definitely contributes to it but it is not the only reason, the work itself, for example, is another important reason. And the same applies to balancing work and family life: having such a climate will surely help and facilitate but will not bypass the individual decisions. At the end, the way one deals with work-family interface is always a personal and familiar decision (Carlson et al., 2009).
7.6.2. FACTOR ANALYSIS

A further factor analysis ran over the surveyed staff (see Appendix I. Staff – Factor analysis), led to the evidence of the existence of two factors characterizing the labour force of the firms and the firm’s culture:

- Focus on Organizational attributes – related to firms where workers are driven by the perceived organizational environment, aggregating attributes as the work-family life policies and culture but also the satisfaction with work and personal/work life.

- Focus on Personal attributes – related to firms whose culture is more person oriented, accounting personal and intrinsic characteristics of the work and personal/family life of each worker and aggregating attributes such as demographic data (gender, marital status, number of children/dependents) but also the function and level of responsibility within the organisation.

![Figure 25 – Staff characterisation according to individual orientation](image)

The meaning of such characteristics is better understood when analysing the graph in Figure 25. According to it, firm’s staff could be categorised in 4 groups:

1. For staff from firms RT3 and UT3, organizational policies and culture are effective drivers of satisfaction at work and at personal/family life. Though separate scopes of their life, firm’s policies and the environment at work are key factors for personal fulfilment. There is a clear recognition for all the investment that the organisation makes in social policies.
2. For staff from firms BK2, TR2 and UT2, organisation policies and environment do not constitute strong motivators. Satisfaction at work and at personal / family life comes from their personal social environment and intrinsic satisfaction from the job and responsibilities they have at work. A challenging job and a suitable social environment are the basic pillars of a satisfactory life. The reason for such a stance is not as simple as it seems. It can be a personal characteristic (UT21); it can be some cynicism or disillusion with respect to the organisation (TR23, TR24, TR25 and BK22, BK24); it can that the policies are so insipid or the environment so indifferent or uncaring that they have no reason for thinking of work-family life policies and culture as drivers. This latter is not the case of any of the surveyed firms because one of the requirements to be chosen was that firms should have a good set of social policies implemented.

3. For staff from firms BK1, TR3 and UT1, neither organisation policies nor environment do constitute strong motivators neither the social environment nor the job they do are sufficiently challenging. Again, the reason for that can be complex. It can be due to an aboullic personal characteristic (UT12); it can be some distrust or disenchantment with respect to the organisation associated to a job that is not stimulating enough and exciting with too much bureaucracy (TR33) or routine (BK12).

4. For staff from the other firms organisation policies and a supportive-environment are as important as their social environment and the content of the job they do. For such a group of firms’ workers, facilitation of personal work agreements, access to benefits and services that allow them to balance their work life with their personal/family life, a development career plan and a supportive manager and team are effective drivers to an overall life satisfaction.

7.7. DIFFERING PERCEPTIONS

From the analysis carried out so far, it is clear that a gap exists between the organisation and the employees’ perception of the existence / absence of work-family life policies as well as the perception that the work environment is family-supportive. This gap is graphically shown in Figure 26.
In this graph, the organizational line (Org) represents the Overall Work-Family Organizational Indicators per Organization – organizational perspective and the staff line represents the Overall Work-Family Organizational Indicators per Organization – staff perspective. The difference between the two lines gives the overall perception gap.

![Overall perception gap](image)

The first conclusion is that the institutional perception, in this research transmitted by the Human Resources Managers, ranks its organisation’s family supportiveness higher than their employees.

A notorious exception within the set of the surveyed firms is RT3. The reason may be found in the very informal climate. This very informal climate is based on a young work force, a vigorous growing business and a strong global corporate entourage associated with a spirit of enthusiasm and simplicity, among other values. This culture not only makes communication easier and more efficient – “There is always lots of news on the walls: in the canteen, in the changing rooms... When a new policy is implemented, it is spread.” (RT31, RT32 and RT35) - but it also makes employees believe that there are no inaccessible policies.

Moreover, after splitting the overall indicators in policies and family-supportive environment indicators, the gaps that are observed are significantly different, confirming that these concepts are different and that they depend on different variables (Thompson et al., 1999).
Figure 27 - Work-family life policies and culture gaps

Not only they are different but also it is possible to detect that the family-supportive environment gap based on the culture and the organizational environment is much more similar to the overall gap than the one related to the policies. This fact demonstrates the predominance of a family-supportive environment over the simple existence of social policies in the work-family life arena, as already studied by (Thompson et al., 1999).

Regarding policies, problems of internal communication were one of the highlighted justifications for the gap, for reasons such as:

- the formal policies exist but the employees do not know so: “We are too far away from the central department. Of course, there is an intranet where we have all the information and there is also a monthly internal newsletter. But we normally do not have time to have a look at it. When I need to solve a special situation, I ask the central department which are the available policies. Most of the times I am surprised with the quantity of policies we have.” (UT21)

- or, at least, they do not know who can access them: “Sometimes we hear that there are, at RT1, certain policies, but we are not sure if they are applicable to us. If our manager doesn’t inform us, we assume that they are not for us.” (RT15)

The policies gap can also corroborate the problem of managers as gate-keepers, cited in the literature (O'Driscoll et al., 2003). This problem was recurrently referred during the interviews, with a nuance: managers act as gate-keepers in both directions. This means that:

- Sometimes, they serve as a barrier to the employees as they have to authorise, agree or, at least, deal with the situation (for example, reorganise the team) when the employees have access to certain policies, namely to policies involving flexible job
agreements: “I know that certain policies exist at RT1 but I also know that it is our manager who has to allow us to access them. So, at the end, I know that, in my situation, I cannot have access to them.” (UT22).

- But they also serve as a barrier to the organisation, as managers have a key role to allow the permeability to the base of the organization, so values, policies and other information can spread and reach everyone. This is the reason for the gap presented by, for instance, RT1: “When we ask to them (the middle managers) to communicate some policies, some of them will communicate and some others they will not do so. We are not sure that the message reaches everyone. That is why we bypass the situation. We send a personal letter to each employee” (RT10).

Concerning the work environment and the perception of it as being family-supportive some differences can be noticed between the firms. For some of them (BK1, TR2, TR3, UT1 and UT2) the gap between the perception of the organisation and the one from the employees is very large; for BK3 and RT1, the gap is non-existent; for RT3, the gap is reversed and for the rest of the firms (BK2, RT2, TR1 and UT3) the gap has an intermediate magnitude.

Numerous studies (e.g. Allen, 2001) point to the fact that, in general, the institutional perception is normally more optimistic than the employees’ one. Accordingly, in this study, for the set of participating firms, a standard difference could be defined as the difference between the mean value of staff perception values and the value of the organizational perception. This standard difference corresponds to the gaps with an intermediate magnitude.

The other situations merit to be analysed, as some interesting reasons for such differences were expressed during the interviews.

- Reversed gap

In RT3, as said, the labour force is quite young and the environment is quite informal. For most of them it is the first experience of work for a multinational firm. Actually for most of them it is the first experience of work at all. Worker’s expectations are high and, so far, they do not feel deceived. On the contrary, they genuinely believe that management tries to meet their needs: “Here, as long as we are loyal, hard-working and devoted to our job, if we need something we can go to the store manager
and ask him. Ultimately, everybody can access anything!” (RT34). And, at the end, there is no evidence of the opposite.

- Non-existent gap

BK3 and RT1 do not present a gap, meaning that the perception workers have of the firm’s culture is similar to the institutional one. The reason for that is different in the two firms, though both have an energetic HR department which is very creative in what concerns internal communication. BK3 has an intense and efficient communication strategy, based on all sort of internal events, intranet and an active presence of the HR department. Communication reaches every worker so they all know what are the corporate values, mission and goals but also the expected behaviors and the policies. An interesting finding is that the events have to be in line with the firm’s culture and the social characteristics of the workers: “in BK3, internal events are typically contexts. We have all kinds of contexts because our people are very competitive and passionate about accomplishment of targets” (BK30). Though, RT1 does not have a strong corporate internal communication strategy, its communication is also very efficient. The communication with each employee is quite personal, based on letters that the CEO sends to each employee, even though they are circa 30000 in Portugal. Moreover, being a family-owned firm and advocating the same values for decades allows the workers to understand accurately the organisation where they work. The fact that all the interviewed workers spoke about precisely the same values (exigency and rigor) is a clear evidence of that.

- Very large gap

BK1, TR2, TR3, UT1 and UT2 gaps show a large divergence of perceptions. The common trait in such organisations is that such organizations inherit a, so called, public-sector culture, meaning that corporate leadership, responsibility and strategy is something distant (Kossek and Ozeki, 1998). At TR2, not only strategy and leadership are distant but they are perceived as a foreign element, laying outside the firm: “This firm has no strategy of its own. Strategy in this firm is always tied to politics. As a public service it is mandatory and crucial to have such link. But as a firm it is very difficult to implement long-term projects and policies because there is no stable and consistent strategy” (TR22). Moreover, managers are also seen as outsiders because they change according to the political rhythm. In the other firms...
(BK1, TR3, UT1 and UT2), managers and supervisors are primarily seen as strategy agents previous to people managers: “My supervisor is primarily concerned with goals. I do not think he genuinely cares for us as persons. He cares about our performance. He says that he has nothing to do with our private life. And it is true. Nevertheless, there are times when we would appreciate a more supportive environment” (BK14).

Another explanation is that most of the employees have been with the enterprise for a long time and profound cultural and organizational changes have been occurring in such firms lately. They resist changing to more flexible policies as they perceived them as less friendly and more severe to their lives: “I fear for the future. I used to feel secure and comfortable at this work place. I used to believe that management care for us genuinely. Now I am sceptical about the flexibility policies and their real motive” (TR25); “Supervisors try to be supportive but we all know that the privatisation is the goal and most of the welfare policies will have to finish” (TR24).

As it was noticed, the perceptions of the employees regarding the extent their organization is family-supportive differed from firm to firm and differed from the perception expressed by their own organisation.

In order to further analyse such differences it is more adequate to use a scatter chart representing on one axis the staff perceptions of work-family policies and culture values and on the other axis the organizational perception, as presented in Figure 28. The graph is divided into four quadrants introduced by the lines indicating the mean value of the staff and the organization perception values.
When examining the chart, it is important to have in mind that all the participating institutions do have implemented some work-family life policies. It was an established pre-condition for firms to be included in the sample. Consequently, it is not surprising that there are no organisations with values above 50%. For a larger sample with no such pre-condition the picture would surely be different as the lower left quadrant would be more populated.

This chart also illustrates the relative position of each pair staff / organisation perceptions values relatively to the others pairs. Moreover, when the standard gap (the difference between the mean value of staff perception values and the value of the organizational perception as defined above) relative to work-family life policies and culture is included in the chart, see Figure 29, it is clear that the majority of the surveyed firms are within such gap. The conclusion is that they tend to distribute themselves along the diagonal of the standard gap, meaning that staff and organisation perceptions are similar.
However, when only the values relative to work-family culture are taken into account, the graph shows a different distribution, as shown in Figure 30.

Also in this case, the standard gap relative to work-family culture values can be drawn in the same chart in order to facilitate the analysis.
As in the preceding chart, there are no organisations occupying the left side of the chart, but now they are more dispersed. In this case, organisations are not as concentrated in the centre of the chart as they were in previous figure. They also occupy the upper and lower zones of the chart. A proof of it is that many of them lay outside the standard gap, corroborating the analysis made earlier in this chapter.

This chart also shows the relative position of each staff/organisation gap when compared with the others. It highlights the fact that not all organisations lay in the same quadrant, leading to the question whether there is a meaning for each quadrant. This meaning will be revealed when comparing this chart with the classification of the corporate approach to Social Responsibility.

**7.8. CORPORATE SOCIAL RESPONSIBILITY CROSS-ANALYSIS**

The analysis undertaken so far resulted from the combination of different research methods – data collected through the survey and from the interviews – but also from the different perspectives - the institutional perspective and the staff perspective. At this stage, the analysis will proceed with the triangulation of the findings from the core themes (work-family life and corporate social responsibility) in order to enlarge the focus and to analyze shared situations (Flick, 2004).

In CHAPTER 6, the surveyed institutions were categorised into different groups confronting the approach to Corporate Social Responsibility evidenced during the interviews with the classification of Garriga and Melé (Garriga and Mele, 2004). They were categorised in groups of firms having an instrumental, political, integrative or ethical corporate approach to Social Responsibility.

When the classification given to the firms is associated with this chart, it highlights the groups of firms with the same CSR classification, while distributed by the organisational perceptions versus the employees’ perceptions. The resulting chart is Figure 31.
When overlaying the result of grouping the firms by CSR classification, it clearly emerges the conclusion that such groups are similar to the quadrants draw in the chart. In the context of the theories reviewed and the research questions stated, further conclusions can be established:

- Social policies as those concerning work-family life harmonization are an instantiation of the more general corporate approach to CSR.
- The match between the two arenas confirms the hypothesis that the employees’ perception is the perception of the consistent corporate behaviour while addressing social responsibility issues, either externally or internally.
- Firms from bellow quadrants (instrumental and political approaches) indicate that the corporate role (either financial or societal one) is their major orientation, even when they offer a comprehensive set of social policies. Firms from above quadrants (integrative and ethical approaches) complement such an orientation with a more humanistic one that employees perceive and value.
- Confronting the position of the firms with the assumed standard gap (shadowed), it is possible to conclude that firms adopting an ethical approach will tend to have a small gap between the organisation and the employees’ perception of the value of work-
family life policies. Political approaches tend to fail to be appreciated by the employees while integrative approaches tend to be overestimated. Though not highly valued, instrumental approaches tend to be clearly perceived by the employees.

Analysing in more detail each quadrant, some further considerations can be done.

- Instrumental approach to CSR

When Corporations consider themselves as an instrument for wealth creation and this is their sole responsibility regarding society, the implementation of work-family life practices and facilitators will mainly aim the increment of profit. In such cases neither employees nor the Corporation greatly value such policies. “Social policies and benefits are an important tool for team motivation but, at the end, we are all driven by goals, targets and results.” (BK13) In general, employees from such firms realize that policies are a mean for increasing productivity, seen as a direct correlation variable of profit. “Though most of the policies are implemented in order to respond to their needs, their performance is the ultimate target of such policies” (TR22). Corporations, on the other hand, see the implementation of social policies as an obligation essential for employees’ satisfaction and motivation (BK10) or even as a “pacifier to deal with labour unrest” (TR20), not because they seek the personal fulfillment of the employees but, at the end, because of performance improving. Corporations tend to implement the legally and market required minimal set of policies. Even when they have better policies than their competitors they frame them as instruments for a better overall performance, “namely in what concerns talent management. If we want to attract and retain the best people, we have to offer a variety of work-family life policies” (BK10).

Interesting is the fact that not only aggressively market-oriented firms can be found in this group, but also firms struggling for survival tend to adopt such a posture. “In times of economic crisis, you have to survive. That is your main duty as a firm. That is our main Social Responsibility. In order to achieve that one has to forget some other humanistic considerations” (TR21).
• Integrative approach to CSR

Integrative approaches build up from the principle that business depends on society for its existence, continuity and growth and, thus, the corporation is focused on the satisfaction of social demands.

As seen in CHAPTER 4, this approach is generally based on the model of Corporate Social Performance (Wood, 1991a), which includes principles of CSR, expressed on three levels: institutional, organisational and individual. The ‘Institutional Principle’ states that Society grants legitimacy and power to business; the ‘Organizational Principle’ invokes that business should adhere to the standards of performance in law and the existing public policy process and the ‘Individual Principle’ affirms that managers, as moral actors, are obliged to exercise discretion, within every domain they have influence in order to promote socially responsible outcomes.

In line with these principles, firms within this group are characterized by three common aspects. They demonstrate a very strong sense of identification with the mission, values and culture of the firm but also with the expected consistent behaviours and policies personalised by the owner, founder or top management - “our story began a long time ago with our founder” (RT31), “we have a story of more than a century” (RT11). They are also characterised by establishing processes of dialogue to stakeholders in order to determine what should be an appropriate corporate social behaviour - “We know that everything we do makes a difference. And some things are no longer wanted or accepted by a client or an employee” (UT31) - and, proactively, reports are published on economic, social and environmental performance, following the idea of triple-bottom line (Elkington, 1997) and the company adheres to certifications - “We know that sometimes we are part of the problem. But we work hard to be part of the solution” (UT31). The third characteristic is that they tend to separate between business, whose goal basically is economic, and social responsibility. It is not denied that business has a social impact, but basically its rationale is economic rationality. Business leadership is a quite important driver of these firms – “We are leaders within domestic market in all business segments” (UT32, RT14). Indeed, the major difference between an integrative approach and the former
instrumental approach to CSR is translated in a more proactive strategy to address the different stakeholders’ expectations, including the workers.

Furthermore the normative foundation is not ethics but social expectations, and, thus, greatly depending on each cultural context - “Our mission is devoted to fulfill people's needs and preferences” (RT31) and the implementation of practices is pushed by coercive pressures of all stakeholders. Employees embedded in such a culture demonstrate a great capacity of adaptation to market changes and competitiveness in order to make a difference and to contribute positively to business. These same attitudes are expected from the firm, namely in the implementation of new social policies and benefits.

- **Political approach to CSR**

Political approaches to CSR have been identified in CHAPTER 4 with the notion of Corporate Citizenship, as evoking the idea of being part and having duties and rights within a community. Firms in this group considered themselves as being part of the society and, as citizens, they ought to contribute to the common good of that same society. Though certain citizenship activities can be considered as strategic investments (Gardberg and Fombrun, 2006), in general, these firms place their participation beyond the economic rationale and consider it decisive regarding the development and well-being of society. This logic of service is emphasized when the firms are public ones (TR1, TR3, and UT2), domestic major employers (BK2 and UT2) or they provide public services (TR1, TR3, UT1 and UT2) - “We are obliged to reach the whole country, so we have the goal to reach and serve everyone. Integrated as part of this goal, we help local social and cultural organisations that support the community and our local employees and their families. We also give national visibility to local municipal initiatives in order to leverage them” (UT31). The fact of having this notion of public service embedded in their mission creates a strong sense of duty that frames all social policies, either internal or external ones – “We have the obligation to give back to society by the fact of being a big banking institution, at all levels. We give back by being a good firm, profitable and sustainable, but also by giving time to our employees so they can be involved with their families and social initiatives, supporting them and their families and supporting community responses to social
needs. For example, we normally sponsor local crèches and recreational institutions” (BK20).

Firms with political approaches, compared to firms with instrumental ones, broaden the core concept of citizenship. This difference is radical as it, definitely, redirects the focus of the firm’s contribution to society and not to the business. On the other hand, both of them emphasize the role of business firms as actors, although of a different status to individuals. Firms with integrative approaches, though they reflect on their role as an organisation, they are mainly focused on integrating expectations of individuals, either citizens, clients, shareholders or employees.

• Ethical approach to CSR

RT2 was the only firm that presented an approach that according to Garriga and Mélé (2004) classified as ethical, in the sense that ethical norms were in the basis of it. Firms in this group do believe that they “render a primordial, indispensable and immensely valuable service not only for the individual person and his growth, but also for society and its genuine development” (RT23).

In line with political approaches, the core notion of the firm is participation and contribution to the common good of the society, first of all to the community in which they operate but also beyond national boundaries, presenting a global sense for citizenship. On the other hand, more according to an integrative approach, they recognize the individual rights and duties from their stakeholders, namely their employees. However, they not only respond and integrate stakeholder expectations, even when it is done proactively, but the firm also sees itself as a participant in a network of stakeholder relationships that cooperate with each other, in line with stakeholder management theory as defined by Freeman (1984, 1994, 2008) -“we seek to produce goods and services according to plans aimed at efficiency and to satisfy the interests of the different stakeholders involved. We believe that business creates wealth for all society, to all subjects involved in it. It has to. Otherwise it is not sustainable in the long-term.” (RT25).

Moreover, and in line with the stakeholder theory that takes into consideration stakeholder rights and their legitimate interests and not only what is strictly
required by law, the firm develops cross-cultural policies even in countries where law and public obligations are much softer – “As a multinational to which society should we be responsible – locals, home or all of these? We try to adopt local country's values but there is a set of core values that is universal and those we do not discard ever.” (RT20).

This integration of a duality of focuses - society and the individual person, short-term and long-term, local and global – regarding social responsibility is perceived by the employees as credible, consistent and genuine – “I think that, at this firm, social responsibility is not just a nice and fashionable expression. It is taken seriously, from the top to the bottom. It gives long-term purpose to all our activities.” (RT24).

7.9. **ECONOMIC RECESSION SCENARIO**

Apart from the explored themes, a major and recurrent one emerged during the field work: the effect of the economic recession period on fostering social policies and on nurturing the organisational culture.

Most of the participating firms recognized that there were changes on the distribution of annual bonuses and other benefits related to employees’ performance but none of them declared that they would discard any of the already implemented policies. The reason was uniform: they do not see work-family life policies as pure human resources management policies but they regard them also as social policies. In this sense it confirmed the proposal that informs this research of moving the field beyond work-family rhetoric towards a new business case steeped in social responsibility (Kossek and Lambert, 2005).

Furthermore, a proactive reaction observed in some firms was the reinforcement of the existent policies, for example: by incrementing the social fund to assist their employees in case of need (BK2, BK3 and RT1) or by communicating the intention that there will be no lay-offs (RT1, TR1 and TR3).

However, even assuming that the firm maintains or strengthens work-family life policies, some effects could be noticed that affected the perceived accessibility of such policies and the work environment in what concerns the attributes related with a family-supportive
environment. Two major effects came forward more than once and deserve to be mentioned:

- Fewer realistic work-family life policies options
  
  With squeezed household budgets, many families are facing economic difficulties that do not permit them to adhere to some work-family life benefits, in particular those that involve receiving a smaller salary. “That part of the salary that could previously be exchanged for time and quality of life is no longer available” (UT22).

- Managerial inconsistency
  
  What managers are being asked to achieve right now in the business is often incompatible with formal work-life policies. This incompatibility makes the consistency of application hard to achieve. Though, usually (if not always), consistency is not achieved uniformly in a firm, especially in times of uncertainty, it is vital that communicating the reasons behind contradictory decisions and behaviours is done in a transparent and reasonable way in order to keep a sense of organisational justice (Alexander and Ruderman, 1987).

- Hostile versus nurturing work environment
  
  Job insecurity and career stagnation have changed the atmosphere that employees perceive and that ultimately form the basis of the organisational climate (Schneider, 1980). “What used to be a nurturing environment became a hostile one because everyone knows that only the exceptional ones will be promoted” (BK23, BK25). Furthermore, withdrawal of managerial support associated with internal organisational messages strengthening that, in order to overcome the economic crisis, employees should be extreme and solely focused on business were signals inconsistent with a work-family life supportive environment and, thus, undermined trust previously built.

All the above effects make employees tend to impose limitations on their own use of organisation offerings and lead some firms (e.g. BK2, UT3) to recognize that having formal policies which practically cannot be used is, at the end, counterproductive (Bond and Wise, 2003b).
7.10. CONCLUSION

In this chapter, patterns of the availability and accessibility of work-family life policies as well as cultural attributes that, according to the literature, obstruct or promote a Family Supportive Culture were identified and analysed. Also specific dimensions of work-family life culture of the participating firms were examined.

The adoption of work-family life policies may be explained as a consequence of the environment where the firm acts. The results of the survey were used to identify relationships between the attributes of the organisation. The analysis led to the indication of the existence of two organisational constituents: one related to the local characteristics of the firm (e.g. local size and demographic composition of the workforce) and another concerning the global macro-configuration of the organisation. The first was a determinant of the family-supportive environment construct while the second was predominant in the implementation of work-family life policies.

Staff data relationships were also analyzed and further aggregators factors were established. According to the staff answers, firms and their labour force could be grouped in four groups depending on what was more characteristic: their organisational attributes or their people attributes.

The interview stage added qualitative data that was particularly useful to inform the analysis but above all to explain the perception’s gap. The relative position of each organisation/staff gap was then compared with the position of the other firms. When represented in a chart, this comparison revealed the fact that not all organisations lay in the same quadrant. Further explanations for the meaning for each quadrant were revealed when confronting this chart with the classification of the corporate approach to Social Responsibility.

At the end of the chapter, the recession economic environment was mentioned. In fact it was an important factor to be taken into account as it somehow distorted the analysis. Some behaviours as the self-imposition of limitations on the use of organisational policies were caused by the particular period Portugal is living. To what extent can it be considered a distortion or a purge of the attributes of the firm revealing a more truthful image of it? That was impossible to conclude from the analysis but consistency or
inconsistency on the corporate values and approach, namely what the firm considers to be its role towards society, became clearer during the research.
CHAPTER 8. CONCLUSIONS

8.1. INTRODUCTION

The aim of this research is to present empirical evidence of the effects of framing the business commitment to work-family life practices as a corporate social responsibility.

The following sections present the main results, conclusions and implications of this research to theoretical advances and to practice.

Finally, some considerations on the limitations of the research undertaken and opportunities and directions for further work are presented in the latter sections.

8.2. MAIN RESULTS

The research provided empirical evidence on the similarities between and the differentiating aspects of various Portuguese medium-large firms in what concerns work-family life policies and culture and corporate social responsibility approaches. The analysis carried out situated them, according to their approaches and positions, within a general map describing the panorama regarding the way firms considered their role in society. The adopted map, from the article written by Garriga and Mele (2004) “Corporate Social Responsibility theories: Mapping the territory”, classifies the most relevant theories and approaches on CSR and related concepts into four groups, which the authors have called instrumental, political, integrative and ethical theories. The map proved to be valid and useful.

Furthermore, the research demonstrated that the driving forces of society and organisation expectations can exert combined pressures on the adoption of work-family life policies, initiatives and culture. Moreover, different types of societal pressures, can be complemented, facilitated or constraint by internal organisational pressures, paving the way to different approaches adopted by the firms.

No matter what approach was adopted by the firms, this research also permitted to conclude that a holistic view of corporate social responsibility, spread all through the organisation, was desirable (Kanter, 1997).
Secondly, the study demonstrated that organisational and employees’ responses showed some commonality of perceptions. All of them agreed that work-family life initiatives are beneficial in helping employees to balance work and family responsibilities, which may explain why an increasing number of organisations are seeking to implement initiatives in this area. In particular, they have recognized that flexibility is an important family-supportive initiative – a common finding in the work–family life research area (e.g. Pitt-Catsouphes and Matz-Costa, 2008). All of them also agreed that everyone benefits when an organisation implements family-supportive initiatives: the employees, their families and the firm.

However, divergence of perceptions was also evident in this study. In some firms, even though Human Resources managers reported high levels of availability for the implemented work-family life policies, this view was not reflected in responses from employees. In those firms, employees reported little availability or a lack of awareness of some work-family life policies.

Hence, and in line with literature (e.g. Parker and Allen, 2001, Allen, 2001, O'Driscoll et al., 2003), the assessment of this fact led to the conclusion that a gap exists between the institutional perspective and the employees’ perception of the value and accessibility of work-family initiatives and the rating organisation’s overall family-supportiveness. Not only that gap exists but it varies from firm to firm.

A possible explanation for the existence of the gap is the existence of communication problems and, indeed, employees reported that their main source of information pertaining to work-family life initiatives was informal, often oral conversations with their manager or with colleagues.

A more plausible and profound reason for the difference between the measured gaps is the perceived inconsistency in organisational and managerial attitudes and policies. According to literature and reinforced in this research (e.g. Perry and Kulik, 2008), managers are a keystone to the effective implementation of work-family policies. Moreover, founders, owners, top and senior management are personally seen as role-models by the employees. Hence, the importance of managers being family-sensitive and act themselves as an example in what regards work-family life issues (e.g. taking seriously family commitments and respecting sensible employees’ family commitments).

“If the CEO and senior management believe in being family-supportive, then this ‘shared
meaning’ became infectious and is established as the culture of the organisation” (BK20).

The first and second main conclusions were the confirmation of the underlying hypothesis of this thesis and that was detailed in the research questions:

- Is the convergence/divergence of perception of the corporation and employees on each organisation related to the way company’s work-family policies and initiatives are framed?

- If so, should Corporate Social Responsibility strategy be aligned and integrated with Work-Family life strategy and policies, in order to promote a consistent corporate mission towards society? What if they aren’t?

Not only the research established the existence of a bridge between Corporate Social Responsibility and Work-family life grounds but it also recognized the relationship between the organisation and employees’ perceptions gap and the different corporate stances in regard with social responsibility. Moreover, it ascertained that when these are not aligned the gap was significantly higher leading to situations of discredit / lethargy or overconfidence / euphoria, both of them non-desirable and posing their own risks.

The third main result is aligned with the theoretical consideration that an organisational culture which supports employees with family responsibilities is another important constituent in what concerns work-family life issues (e.g. Thompson et al., 1999, Rhoades and Eisenberger, 2002). This research reaffirmed that work-family policies and work-family culture are different constructs and, moreover, work-family culture is predominant on the employees’ perceptions on the value and availability of such policies and initiatives. Results demonstrated that the overall gap between the differing perceptions of the organisation and that of employees had a similar pattern to the work-family culture gap (and dissimilar to the work-family life policies gap of perceptions).

Another topic discussed in the literature is the difference between organisational culture and the cultural attributes more related with the management of work-family life issues (e.g. Thompson et al., 1999). In this study, it was not conclusive which were predominant but, nevertheless, it confirmed that the work-family organisational support has a fundamental weight in employees’ perceptions (e.g. Behson, 2002b). This conclusion
reinforces the usefulness of the alignment with more strategic issues such as the corporate approach to social responsibility.

This study also concludes that the presence work-family life practices depends on the industrial sector, composition of the staff, and structure of the ownership. Time, space and work organisation were some of the major dimensions of relevance for balancing work and family life (Berg et al., 2003). Tendencies toward a less rule-based and more regulatory or flexible regulation have been noticed in all three dimensions in the services firms. Indeed, individualised schedules, temporal and geographical flexibility as well as more job autonomy seem to have become more widespread, particularly among knowledge workers (Dastmalchian and Blyton, 2001). However this flexibility could not be found in retail firms and transport firms and, in general, in all jobs based on involuntary nonstandard shifts (i.e., nights, weekends, rotating) (Staines and Pleck, 1983). Literature points out that this same conclusion is applicable to manufacturing sector (Berg et al., 2003) and independently of the ownership structure (private or public). However, in some state owned firms, workers working the standard shift day account for high levels of balance between work and family life (Tausig and Fenwick, 2001).

Regarding family owned firms, in line with the literature, this research concludes that work-family life practices, though not significantly different from those found in non family owned firms, tend to be more individualised and applicable in a case by case basis (Landsberg, 1999).

Finally a major conclusion derived from the previous ones, is that “one size does not fit all”, meaning that although some companies had the same policies, employees perceived institutional work-family life strategy and initiatives differently. One reason was the cultural attributes of the organisation as explained above but another was the singularities of the workforce (e.g. age, education, work dynamics). This finding requires from firms an attentive and thorough strategy in what concerns the overall management of their people. In fact, not only new work dynamics, based on empowerment, participation and entrepreneurship take more time and energy and, thus, present new problems for both men and women juggling work and family commitments but also employees’ personal and familiar needs and expectations vary according to the individual and time. As Kanter used to say the conclusion is that “as new barriers are knocked down, new ones appear” (1993).
8.3. THEORETICAL IMPLICATIONS

This research presented several important conclusions which contribute to the enrichment of the knowledge on work-family life and corporate social responsibility themes and associated literature, mainly by offering an analysis of these fields from a different theoretical perspective.

Firstly, findings from the field work undertaken in the scope of this research provided empirical evidence of what has been suggested by some scholars (e.g. Goodstein, 1994b, Pitt-Catsouphes and Googins, 2004, Kossek and Lambert, 2005). These authors have acknowledged that the business case for work-life policies and practices needs to be recreated in ways that promote “the goal of integrating a balance between paid work and family life into notions of corporate social responsibility” (Kossek and Lambert, 2005, page 524). The results indicate that the dichotomy between the two fields of research could / should be overcome as Corporate Social Responsibility may be considered a dynamic process encompassing the intertwined roles of the firm towards society and the organisation as well as the interaction between them.

In this sense the findings confirmed the validity of the claims mentioned above. Moreover, the former extend and enrich the latter. The aim of the research was not only to understand the promotion of work-family life issues as corporate social responsibility initiatives but to discuss the different organisational stances and approaches to corporate social responsibility and how they integrate (or not), within the same frame, the sustainability of their employees and their employees’ families.

This research contributes to theoretical advances as it expresses a missing link from either fields of research as shown in Figure 32.
When considering work-family life literature, it is uncommon to come across literature that takes into consideration the enrichment of families, namely the employees’ families, as a firm’s responsibility towards society and not only a commitment towards their employees (e.g. Melé, 2009, Pitt-Catsouphes and Googins, 2004, Carlson et al., 2009). And the same applies to the Corporate Social Responsibility literature that normally addresses issues related to the harmonization of work and family life in the scope of its internal social responsibility, separated from the initiatives concerning the external social responsibility that is directed to society in general (e.g. Fenwick and Bierema, 2008, Bhattacharya Cb, 2008, Bronn and Vidaver-Cohen, 2009). As it is stated in this research, the so called internal and external social responsibility could be further analysed jointly. Moreover they should be aligned in order to be credible from the employees’ perspective as both reflect the firm’s attitude and role towards society.

Secondly, by establishing the bridge between two normally theoretically disconnected themes, this dissertation opens doors to further research focused on this relationship. Moreover, the vast literature from both arenas can illuminate each other providing new insights to theory and to the understanding of the complex phenomena under study: the individual, organisation, family, business and society. An example would be to apply traditional concepts of corporate social responsibility field such as sustainability and corporate citizenship to corporate work-family life approaches. This implies an exercise aiming to overcome and integrate the different sciences where these two fields were rooted.

Over the past few decades several theoretical frameworks on the relationship between social, namely philanthropic, or environmental initiatives and firm’s performance have emerged. What this work fosters as an avenue for further academic research is the challenge of governing the firm as a whole, considering it as a community of persons within the society.

The challenge that has already been addressed by some authors (e.g. Lambert and Waxman, 2005) will be how to create knowledge that crosses disciplinary boundaries and addresses different levels of analysis, that is research that not only gives equal weight to multiple levels of analysis (e.g. organisational levels) but also conceptualizes adequately
different sectors (e.g. economic sectors, cross national studies). Few individuals master all the theories that will probably be needed to be put together in order to develop a credible integrative model, thus a further direction would be to foster cross-disciplinary research teams (e.g. social studies, humanities, political science, economics, management).

8.4. RELEVANCE FOR PRACTICE

This research offers important contributions to practice in several different areas, specifically in the field of work-family life issues, corporate social responsibility and the relationship between them. Conclusions are also relevant to overall management of people in the organisation.

Firstly, the research points at the importance of having a holistic view of the firm’s mission towards society. It suggests that not only there is a spillover in the relationship between both the work-family and social responsibility grounds but that both worlds and the relationship between them is a constituent intrinsic to organisational life and culture. This conclusion is in line with the academic debate in defining what exactly constitutes a socially responsible practice (McWilliams et al., 2006).

The alignment (or misalignment) between both arenas has consequences that were revealed in this research. Whereas inconsistency between both approaches was penalizing for the perception of the employees regarding organisational supportiveness, alignment between them proved to reinforce perceptions regarding initiatives in both fields. That reinforcement effect is particularly important in situations when the firm as to implement tough strategies during hard times.

Second, top management, line managers and employees often exhibit different understandings of organizational Corporate Social Responsibility policies (Hemingway and Maclagan, 2004), and these policies are not always integrated into everyday operations. Given its commitment to individual and organizational development, human resource managers and units appear well positioned to help understand and integrate both corporate social responsibility and work-family life initiatives, particularly by posing the latter as the former. Human resources management professionals potentially offer important voice, expertise and services to achieve the fullest development of Corporate Social Responsibility. However, in all but a few firms Human Resources managers
indicated sensitivity to the issues in study but, at the same time, some distance, even disconnection, between their activities and the firm’s corporate social responsibility commitments and a very pale notion of the fact that their work could be framed as social responsible. Overall, the research supports the idea already addressed in literature, that Human Resources management practice should move away from strict performance-oriented interest focused on shareholder value and move towards a more socially responsible practice (e.g. Fenwick and Bierema, 2008). The difference is huge and it will be reflected not only as an attempt to build a climate of care and commitment to employees (Grover and Crooker, 1995) but also as a way to build a climate that will foster personal and family enrichment and will promote, at the long-term, a sustainable society.

Thirdly and in line with the above considerations, the research also shows the key role of managers as gate keepers in the application of organizational policies such are work-family life and corporate social responsibility ones. The evidence suggests that whereas there is a common perception that work-family life initiatives and family-supportiveness workplaces are beneficial for employees, the firm and society, hindrances including inconsistencies in the offering of initiatives, lack of awareness of the initiatives available, and differing perceptions undermine the concretization of such policies. The study concluded that managerial consistency, supportiveness and exemplarity are important vehicles for reinforcing the organizational stance on such issues. Moreover in most of the participating institutions they were expected to exercise considerable discretion when implementing practices. Though these findings confirm those in the literature (e.g. Bond and Wise, 2003a, Perry and Kulik, 2008), they urge for clear improvement on information, training and support to line managers in order to minimize inconsistencies in the application of organizational policies. Not only for the sake of consistency, but also because understanding and communicating the reasons behind decisions in a transparent and straightforward way is crucial for maintaining the respect and unity of their teams.

Finally, recognizing that employees have a variety of work and non-work responsibilities that they can better manage with assistance and support from the organization is a symptom that the workforce is changing and so are workplaces. A marginal contribution to practice, alluded to during the interviews, is that the development and implementation of work-family initiatives, such as flexibility, encourage technology and the accompanying mobility it provides to be utilised to its fullest extent.
8.5. LIMITATIONS

Though the results of the research are an important and relevant contribution both to literature and to practice, they should be interpreted carefully as they are not without limitations. These limitations come from constraints due to early conceptual choices, the methodology adopted to collect the data, the way the data was analysed and finally the theoretical approach used to accommodate and discuss the findings.

Firstly, the study of work-family life issues is not independent of the way in which such concepts are defined. The associated concepts were bounded in order to avoid misunderstandings and framed in accordance with the existing literature on such issues. However, it can be argued that a different conceptualisation of such boundaries could produce different results. This is particularly relevant for the case of work-family life arena (see CHAPTER 3). The definition of “work” was restricted to the domain associated with paid professional employment and the concept of family-life was understood in relation with “the policies and initiatives that promote the enrichment of the family in the accomplishment of shared goals and the occupancy of multiple familiar roles” (Eby et al., 2005). Differentiation between different kinds of working relations and arrangements (e.g. employee / employer, paid / volunteer, full-time / part-time) was not considered in this research as also it was not considered the concept of personal enrichment (and not only family enrichment). This latter limitation was mitigated during the interviews stage by including employees without marital life or caring responsibilities but further work should be undertaken in order to research the hypothesis using broader concepts of work-personal and family life and more variables of analysis.

Secondly, and as already mentioned in CHAPTER 5, this research is not context-free (Creswell, 1994) and, thus, it can present problems of generalization to other populations. In principle, an inductive approach such the one undertaken permits to generalize to theory rather than to populations (Mitchell, 1983). It would need further data in order to establish the conditions in which theoretical conclusions are applicable.

Another consideration is the perception that different strategy and methods emerge from different epistemological and ontological stances (e.g. Slife and Williams, 1995). That has important implications not only on the way theory is generated but also when considering the criteria by which the outputs of the research are evaluated. Whereas there
is a considerable consensus about assessment criteria for research within a positivist framework there is far more debate about what makes a good research within alternative approaches more interpretive like the chosen inductive-qualitative approach (Cassell et al., 2006). In contrast to positivism, reality is interpreted and analyzed through the eyes of all the actors engaged on the research and one should be aware of this subjectivity.

Likewise, in circumstances like the ones when the research took place, reality is highly situational, because of the dynamics of individuals, organizations and the economic and social environment (Guba and Lincoln, 1994, Johnson et al., 2006). As an example, employees’ perceptions of organizational environment can be biased by the external environment.

Thirdly, findings could be collected and analysed in different ways. As already discussed in CHAPTER 5, the alternative use of other more extensive and intrusive and equally adequate qualitative methods (e.g. case studies) could produce additional information which would allow for an extension of current conclusions. Also the analysis of the quantitative data was based on correlation relationships and factor analysis and could be further extended with, for example, regression models. For hierarchical and multilevel data as those collected in this work, the use of hierarchical linear models could be a viable analytic approach. In the paradigmatic application of such models, observations within each group (e.g. organization) vary as a function of group-level (Raudenbush, 1988). This contributes to the understanding of phenomena that might be explained by individual factors and also by the environment in which the phenomena of interest is being measured, as it is the case of this research.

Finally, this research focused on the link between work-family life issues and the corporate approach to social responsibility. Furthermore, the use of theoretical work-family life culture concepts and a corporate social responsibility framework oriented the research. Hence, discussion of findings was centred on and limited by this aim. However there are other theoretical approaches and related issues, some of them covered in the literature review chapters, which could guide the analysis to different themes.
8.6. FURTHER DIRECTIONS

Several findings which came to light during the research offer opportunities for further study. These encompass further directions for the research and further methodological directions.

This research was centred on Portuguese medium-large firms that had already set up a set of work-family life policies. Though generalisation in such themes is always complex, and sometimes imprudent, as they have a significant cultural component (Tanaka, 2005), important results could also be obtained and compared if extended to other economic sectors (e.g. manufacturing), to small-medium firms (with more informal organizational environments), to a broader range of distinct firms (without a good set of work-family policies) or to non-Portuguese firms (e.g. cross national studies). With further work based on different populations, present findings could be refined and enriched with complementary views. Also, a possible stream to explore and that has been pointed previously has to do with different level of analyses (e.g. individuals, workers, organisations, communities, societies).

Other research directions were pointed out when addressing the theoretical implications of conclusions met during this research. They pointed to a deeper conceptualization of the link between the two fields of research and further research on the consequences of the alignment or misalignment of both work-family life and corporate social responsibility approaches. A credible hypothesis based on current empirical research is that the application of a joint framework for both human resources and social responsibility management leads to a mutual enrichment of both business and family and, ultimately, society.

In fact, tremendous progress has been made in implementing innovative work-life policies and programmes over the past 20 years. However, there is still a significant challenge to institutionalize this new way of working and managing the workforce. Moreover, credibility, consistency and potential benefits coming from these policies will only be achieved through an integrated approach based on a social responsibility paradigm.

Following this rationale, a further direction to pursue is to craft this paradigm in a way that is consistent with broader social agenda that spans the boundaries of work, personal and societal life, while laying the foundation for firms willing involvement in implementing this agenda. Difference in goals and approaches of academics and
practitioners, sometimes, create barriers to further research (Ruderman, 2005). Scholars traditionally focus their work in terms of new ideas, restructuring the way firms conduct business and organize the workplace, generalization of knowledge while practitioners tend to work on specific outcomes that have implication for performance and to individual-level of analysis (e.g. how worker’s stress might be eased). A first-step for scholars and practitioners to make a unique contribution could be to focus on how workers, at all levels, are key to the firm’s performance and sustainability, as it has been advanced by some authors (e.g. Kossek and Lambert, 2005, Litchfield et al., 2004).

The research also confirmed the critical role of senior leaders and middle managers in making the cultural transition to such innovative and flexible workplaces. Due to it being so critical, this is an area reclaiming further work. Furthermore, the extant literature on work-family life and corporate social responsibility practices basically relies on identified subjects at the level of the individual and of the organization and the linkage between them. Nonetheless, organization and law cannot ensure that supervisors will be supportive of workers and that workers will be evaluated on outcomes rather than face time (Kossek and Lambert, 2005). In addition, managers are also well-recognized drivers of corporate social responsibility as they can strongly influence the firm’s behaviour (Waldman et al., 2004). So finding creative ways of posing work-family life issues in the frame of corporate social responsibility is an important direction that is essential if all workers are to have access to the benefits – whether from government, their employer or their community – and in order to develop fulfilling personal lives.

From a global perspective, further work needs to be undertaken aiming to understand different cultures (Powell et al., 2009) and different contexts: more social responsibilities to master, more time pressures to juggle and more relationships to rethink. In addition “while cleaning the environment is also an important arena… a greater challenge for business is to identify a social agenda that identifies ways to contribute to today's families and tomorrow's workforce.” (Kanter, 1997).

Concluding, this research intended to be a breakthrough in bridging traditionally separate worlds of research while confirming the importance of an holistic view of the organisation and its role towards its people and society. The map is drawn but as Rosabeth Moss Kanter also posed “the destination has not been reached just because the map has been drawn” (Kanter, 1997).
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Appendix A. Survey

WFP - Work-Family life policies scale

It is composed of 31 questions, according to the following table:

<table>
<thead>
<tr>
<th>Job flexibility</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>P1</td>
<td>Flexible work schedule</td>
</tr>
<tr>
<td>P2</td>
<td>Part-time work</td>
</tr>
<tr>
<td>P3</td>
<td>Half day free in exchange for working longer hours the rest of the week</td>
</tr>
<tr>
<td>P4</td>
<td>Reduced working hours in exchange for a lower salary</td>
</tr>
<tr>
<td>P5</td>
<td>Maternity leave beyond the legal minimum</td>
</tr>
<tr>
<td>P6</td>
<td>Paternity leave beyond the legal minimum</td>
</tr>
<tr>
<td>P7</td>
<td>Leave of absence to take care of a family member</td>
</tr>
<tr>
<td>P8</td>
<td>Flexible vacation schedule</td>
</tr>
<tr>
<td>P9</td>
<td>Permission to leave the workplace due to a family emergency</td>
</tr>
<tr>
<td>P10</td>
<td>Keeping job perks after a long leave of absence</td>
</tr>
<tr>
<td>P11</td>
<td>Replacement of staff that is on leave of absence</td>
</tr>
<tr>
<td>P12</td>
<td>Efforts to reintegrate employees that have been on a long leave of absence</td>
</tr>
<tr>
<td>P13</td>
<td>Possibility of working at home</td>
</tr>
<tr>
<td>P14</td>
<td>Video-conferencing to reduce the need for commuting</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Support, services and benefits</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>P15</td>
<td>Professional counselling</td>
</tr>
<tr>
<td>P16</td>
<td>Personal/family counselling</td>
</tr>
<tr>
<td>P17</td>
<td>Legal/financial/tax counselling</td>
</tr>
<tr>
<td>P18</td>
<td>Training on family issues</td>
</tr>
<tr>
<td>P19</td>
<td>Training on how to reconcile work and family</td>
</tr>
<tr>
<td>P20</td>
<td>Training on time and stress management</td>
</tr>
<tr>
<td>P21</td>
<td>Training on men’s and women’s different working styles</td>
</tr>
<tr>
<td>P22</td>
<td>Information on daycares and schools</td>
</tr>
<tr>
<td>P23</td>
<td>Fitness center</td>
</tr>
<tr>
<td>P24</td>
<td>Information on senior citizen centers or centers for handicapped persons</td>
</tr>
<tr>
<td>P25</td>
<td>Daycare service (either in-house or subsidized)</td>
</tr>
<tr>
<td>P26</td>
<td>Health care plan for family members</td>
</tr>
<tr>
<td>P27</td>
<td>Life insurance</td>
</tr>
<tr>
<td>P28</td>
<td>Accident insurance</td>
</tr>
<tr>
<td>P29</td>
<td>Outplacement for those who leave due to restructuring or closure</td>
</tr>
<tr>
<td>P30</td>
<td>Retirement plan</td>
</tr>
<tr>
<td>P31</td>
<td>Tickets or subsidies for meals at restaurants</td>
</tr>
</tbody>
</table>

Table 18 – Survey - Work-Family life Policies scale

Each answer measures the availability (or the perception of such availability) of a specific policy within the firm, according to the four-point rating-scale:

0-Not Available (less than 25%)
1-Available to Some Employees (between 25 and 50%)
2-Available to Most Employees (between 50 and 75%)
3-Available to All Employees (more than 75%)
WFC – Work-family life culture scale

It is composed of 8 questions, divided into hindrances, promoters and managerial attitudes according to the table that follows.

Each question contributes to characterization of one dimension of the family-supportive culture:

- TM – Time demands and expectations
- NC – Negative career consequences
- MS – Managerial support

### Hindrances

| C1 | Employees are expected to take work home | TM |
| C2 | Rejecting a promotion or transfer for family reasons might affect an employee’s career in your company | NC |
| C3 | An employee that benefits from a leave of absence or a reduction in hours for family reasons is judged as being less committed to the company | TM |

### Promoters

| C4 | Employees are encouraged to go home after a certain time of day | TM |
| C5 | Decisions in the HR department take an employee’s family/personal situation into account | NC |
| C6 | Executives are understanding when employees put their families first | NC |

### Managerial attitudes

| C7 | Managers/supervisors are sensitive to the importance of the work/family balance | MS |
| C8 | Managers/supervisors are an example of family-responsible behavior | MS |

Table 19 – Survey – Work-Family life culture scale

Each answer measures the perception of the respondent, according to a four-point rating-scale:

<table>
<thead>
<tr>
<th>Hindrances</th>
<th>Promoters</th>
<th>Managerial Attitude</th>
</tr>
</thead>
<tbody>
<tr>
<td>3-Never</td>
<td>0-Never</td>
<td>0-None</td>
</tr>
<tr>
<td>2-Occasionally</td>
<td>1-Occasionally</td>
<td>1- Some</td>
</tr>
<tr>
<td>1-Often</td>
<td>2-often</td>
<td>2- Most of them</td>
</tr>
<tr>
<td>0-Always</td>
<td>3-always</td>
<td>3-All</td>
</tr>
</tbody>
</table>
### Firm’s demographic variables

<table>
<thead>
<tr>
<th>variables</th>
<th>meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>control</td>
<td>The company’s control</td>
</tr>
<tr>
<td>Government</td>
<td>public or private enterprise but where the control of the company is exercised, or greatly influenced, by the Portuguese Government</td>
</tr>
<tr>
<td>Private (Domestic)</td>
<td>Private company majority-owned by Portuguese capital</td>
</tr>
<tr>
<td>Private (Foreign)</td>
<td>Multinational firm operating in Portugal</td>
</tr>
<tr>
<td>geography</td>
<td>Geography where the organization is present</td>
</tr>
<tr>
<td>Portugal</td>
<td>Portuguese company with domestic scope</td>
</tr>
<tr>
<td>Portugal &gt; Global</td>
<td>Portuguese company with international expression</td>
</tr>
<tr>
<td>Global &gt; Portugal</td>
<td>Multinational firm operating in Portugal</td>
</tr>
<tr>
<td>totsize</td>
<td>Total number of workers in the world</td>
</tr>
<tr>
<td>portsize</td>
<td>Total number of workers in Portugal</td>
</tr>
<tr>
<td>wmanag</td>
<td>Percentage of women on management functions</td>
</tr>
<tr>
<td>wstaff</td>
<td>Percentage of women in the staff</td>
</tr>
<tr>
<td>nonperm</td>
<td>Percentage of workers with non-permanent contracts</td>
</tr>
<tr>
<td>absence</td>
<td>Percentage of Absenteeism</td>
</tr>
<tr>
<td>attrition</td>
<td>Attrition rate</td>
</tr>
</tbody>
</table>

### Staff's demographic data

<table>
<thead>
<tr>
<th>variables</th>
<th>meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>swork</td>
<td>satisfaction with work</td>
</tr>
<tr>
<td>1-not at all</td>
<td>2-modestly 3-fairly 4-completely</td>
</tr>
<tr>
<td>sfamily</td>
<td>satisfaction at family</td>
</tr>
<tr>
<td>1-not at all</td>
<td>2-modestly 3-fairly 4-completely</td>
</tr>
<tr>
<td>gender</td>
<td>gender</td>
</tr>
<tr>
<td>0-male</td>
<td>1-female</td>
</tr>
<tr>
<td>age</td>
<td>age group</td>
</tr>
<tr>
<td>1- &lt; 25</td>
<td>2- 25-30 3- 31-40 4- 41-50 5- 51-60 6- &gt;60</td>
</tr>
<tr>
<td>marital</td>
<td>marital status</td>
</tr>
<tr>
<td>1-married</td>
<td>2-single 3-divorced 4-widowed 5- other</td>
</tr>
<tr>
<td>nchild</td>
<td>number of children</td>
</tr>
<tr>
<td>0</td>
<td>1 2 3 4 &gt;4</td>
</tr>
<tr>
<td>age_young</td>
<td>age group of the youngest person living at home or dependant</td>
</tr>
<tr>
<td>1- &lt; 3</td>
<td>2- 3-9 3- 10-13 4- 14-18 5- 18-24 6- &gt;24</td>
</tr>
<tr>
<td>full_time</td>
<td>working part-time or full-time</td>
</tr>
<tr>
<td>1-part-time</td>
<td>2-full-time</td>
</tr>
<tr>
<td>sfull_time</td>
<td>spouse working part-time or full-time</td>
</tr>
<tr>
<td>1-not applicable</td>
<td>2-part-time 3-full-time 4-not working</td>
</tr>
<tr>
<td>work_level</td>
<td>hierarchical level</td>
</tr>
<tr>
<td>1-other</td>
<td>2-supervisor /team leader</td>
</tr>
<tr>
<td>3-manager</td>
<td>4-top manager</td>
</tr>
<tr>
<td>work_function</td>
<td>functional attribute</td>
</tr>
<tr>
<td>1-administrative</td>
<td>2-operations 3- commercial 4- technical 5- management</td>
</tr>
<tr>
<td>nwhours</td>
<td>number of hours worked per week</td>
</tr>
</tbody>
</table>
Appendix B. Interview guide

Interviewee - Demographic data

1. Gender
2. Age
3. Academic background
4. Marital Status
5. Number of Children (ages)
6. Age of the youngest living at home or dependant
7. Age of the eldest living at home or dependant
8. Do you have elder care responsibilities (if yes, please explain)
9. Do you care for a disabled relative (if yes, please explain)
10. Are you the main carer in your household (if no, please explain)?
11. Are you the sole earner in your household (if no, please explain)?

12. Job title
13. Number of years you have worked in this firm
14. Do you work fulltime or part-time (if part-time, please explain)
15. What are your contractual hours per week?
16. How many hours do you normally work per week?
17. Are you paid overtime?
18. Do you have any personal work arrangement/job flexibility?
19. Briefly describe your work (manager, peers, team, subordinates, …)

If your spouse works,

20. Job title
21. Number of years he/she has worked in his/her firm
22. Does he/she work fulltime or part-time (if part-time, please explain)
23. How many hours does he/she normally work per week?
24. Is he/she paid overtime?
25. Does he/she have any personal work arrangement/job flexibility?
Interview guide - Human Resource Manager

1. What do you think about firms introducing work-family life benefits and practices in general? WFL Approach – Personal opinion
2. Could you summarize the firm’s work-family life practices? WFL Practices
3. What is the mission of your firm? Mission Ext / Int
4. How are the benefits and practices integrated in / aligned with the firm's mission? Mission Int + WFL Approach
5. What do you think about firms involving in social responsibility initiatives? CSR Approach – Personal opinion
6. Is your firm active in social responsibility activities? CSR Approach
7. Why is your firm involved in social responsibility initiatives? CSR Approach - Drivers (profit / power / legitimacy / ethical requirements)
8. Why is your firm involved in work-family life policies? WFL Approach - Drivers (profit / power / legitimacy / ethical requirements)
9. In your opinion, are work-family life initiatives a “responsibility” of the enterprise? Link between CSR and WFL Approach

Possible topics to take into consideration are:
“they have different scopes” / “reinforce each other” / “different responsibilities” / “is more important one than the other” / “the reason behind each, the objectives, the benefits are different “

Figure 33 – Conceptual framework, themes and variables of analysis
10. How would you describe life at your organization?
   How would you describe the culture?
   How would you describe the work environment?
   Organizational context + Work-family life culture

   Possible topics to take into consideration are:
   practices and procedures, attitudes and behaviour, structural and contextual
   factors.

11. Is there an illustrative initiative you would like to share?

   Purpose: to understand several cultural aspects
   What reasons led the firm to promote / adopt it (Motivation)?
   Why was it approved / adopted by the Firm (Drivers)?
   What were the expected / achieved benefits (targets/benefits)?

12. How where FR policies/practices affected by the economic crisis? Were there changes
   in the benefits? Were there changes in its use?

   Purpose: to study consistency between WLF approach and culture

13. Are there social themes / problems relevant for the sustainability of the firm? Is the
    firm engaged in creating alternatives / solutions?

   Purpose: CSR approach
Interview guide - Employee

1. Could you summarize the firm’s work-family life practices? WFL Practices
2. Do (did) you benefit from some of them? WFL Practices
3. In your opinion, what factors contribute more positively and negatively to the satisfaction in various spheres of life (work, family, personally). WFL (Uncovered themes)
4. Have you enjoyed some sort of flexible time arrangement? WFL Practices
5. Did you feel that, somehow, it affected (it could had affected) your career? How? Why? WFL culture
6. In case you choose, for e.g. to work part-time, work mostly from home or take a leave to take care of one of your children or parent
   - Would it be possible?
   - Could you decide it freely?
   - Would it affect your career?
   - Would you have the support of your manager?
   - Would you have the support of your team / department?
WFL culture
7. How do you reconcile your work with time to deal with personal matters or to be present in family events? How do you prioritize the activities? WFL culture – time demands + expectations
8. Do you feel that you work far too many hours? Do you feel that you have too much work?
   - Is that what your manager expects from you?
   - Is that what the organization expects from its employees?
   WFL culture – time demands + expectations
9. What does your manager expect from you? WFL culture – expectations
10. Does your manager
   - Work too many hours?
   - Know how to motivate the team? Does he/she appreciate your work?
   - Gives you autonomy? Is he/she picky?
   - Is he/she understanding when you need time for the family?
   - Does he/she talk with you about non-professional subjects, such as family?
   WFL culture – supervisor support and example
11. Would you like to change to another team / department? WLF – supervisor support + Work environment + Uncovered themes
12. How do you describe the work environment in your team / department / organization? WLF – Work environment + Uncovered themes
13. In general, in your organization, having special working arrangement in order to facilitate work-family life balance has negative consequences for the career? Why? WFL culture – career consequences

14. What does the organization expect from employees? WFL culture – expectations

15. Why does your firm provide WFL benefits? WFL Approach - Drivers (profit / power / legitimacy / ethical requirements)

16. Do you think your firm would continue to do so regardless of the competition / crisis? WFL Approach - Drivers (profit / power / legitimacy / ethical requirements)

17. Do you like to work for your firm? Would you change to another if you had a job opportunity? Organizational Context – Perceived organizational support

18. Do you trust top management? Organizational Context – Trust in management

19. What values / practices do you like most / least in your firm? Organizational Context – Perceived fair treatment

20. In general, are people fairly treated at your firm? Organizational Context – Perceived fair treatment

21. Is your firm active in social responsibility activities? CSR Approach

22. Why is your firm involved in social responsibility initiatives? CSR Approach - Drivers (profit / power / legitimacy / ethical requirements)

23. In your opinion, are work-family life initiatives a “responsibility” of the enterprise? Link between CSR and WFL Approach

Possible topics to take into consideration are:
  “they have different scopes” / “reinforce each other” /
  “different responsibilities” / “is more important one than the other” /
  “the reason behind each, the objectives, the benefits are different “

24. Do they make a difference? WFL – uncovered themes
Appendix C. Survey – Organizational results

WFP - Work-Family Policies

In your firm, how many employees have access to?

<table>
<thead>
<tr>
<th>Policy</th>
<th>Access Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>P1. Flexible work schedule</td>
<td>2 3 3 3 4 3 2 2 2 2 3 3</td>
</tr>
<tr>
<td>P2. Part-time work</td>
<td>2 2 4 4 2 3 2 2 2 2 2 2</td>
</tr>
<tr>
<td>P3. Half day free in exchange for working longer hours the rest of the week</td>
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<tr>
<td>P4. Reduced working hours in exchange for a lower salary</td>
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</tr>
<tr>
<td>P5. Maternity leave beyond the legal minimum</td>
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<tr>
<td>P6. Paternity leave beyond the legal minimum</td>
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</tr>
<tr>
<td>P7. Leave of absence to take care of a family member</td>
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</tr>
<tr>
<td>P8. Flexible vacation schedule</td>
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</tr>
<tr>
<td>P9. Permission to leave the workplace due to a family emergency</td>
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<tr>
<td>P10. Keeping job perks after a long leave of absence</td>
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<td>P11. Replacement of staff that is on leave of absence</td>
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<tr>
<td>P12. Efforts to reintegrate employees that have been on a long leave of absence</td>
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<td>P13. Possibility of working at home</td>
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<td>P14. Video-conferencing to reduce the need for commuting</td>
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<td>P15. Professional counselling</td>
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<td>P16. Personal/family counselling</td>
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<td>P17. Legal/financial/tax counselling</td>
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<td>P18. Training on family issues</td>
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</tr>
<tr>
<td>P19. Training on how to reconcile work and family</td>
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</tr>
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<td>P20. Training on time and stress management</td>
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</tr>
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<td>P21. Training on men’s and women’s different working styles</td>
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<td>P22. Information on daycares and schools</td>
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<td>P23. Fitness centre (either in-house or subsidized)</td>
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<td>P24. Information on senior citizen centres or centres for handicapped persons</td>
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<td>P25. Daycare service (either in-house or subsidized)</td>
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<td>P26. Life insurance</td>
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<td>P27. Accident insurance</td>
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<td>P30. Retirement plan</td>
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<tr>
<td>P31. Canteen or allowance for lunch</td>
<td>4 4 4 4 4 4 4 4 4 4 4 4</td>
</tr>
</tbody>
</table>

Legend: 1=None 2=Some 3=Most 4=All

Table 20 – Work-Family Policies per Organization– Organizational Perspective
### APPENDIX C. SURVEY – ORGANIZATIONAL RESULTS

#### WFC - Work-Family Supportive Culture

| C1. Employees are expected to take work home | BK 1  BK 2  BK 3  RT 1  RT 2  RT 3  TR 1  TR 2  TR 3  UT 1  UT 2  UT 3  |
|--------------------------------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
|                                            | 1 1 2 2 1 1 1 2 2 1 1 2                                      |
| C2. Rejecting a promotion or transfer for family reasons might affect an employee’s career in your company | 1 1 1 1 2 1 1 1 1 2                                      |
| C3. An employee that benefits from a leave of absence or a reduction in hours for family reasons is judged as being less committed to the company | 1 1 1 1 1 1 1 1 1 2                                      |
| C4. Employees are encouraged to go home after a certain time of day | 3 3 3 3 4 2 2 3 3 2 4 3                                      |
| C5. Decisions in the HR department take an employee’s family/personal situation into account | 4 3 3 3 4 3 2 2 4 4 3                                      |
| C6. Executives are understanding when employees put their families first | 3 3 3 3 4 2 3 2 3 4 3                                      |

Legend: 1-Never 2-Occasionally 3-Often 4-Always

| C7. Managers/supervisors are sensitive to the importance of the work/family balance | BK 1  BK 2  BK 3  RT 1  RT 2  RT 3  TR 1  TR 2  TR 3  UT 1  UT 2  UT 3  |
|------------------------------------------------------------------------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
|                                                                                   | 2 3 2 2 4 3 4 3 4 4 4 4 3                                      |
| C8. Managers/supervisors are an example of family-responsible behaviour              | 2 3 2 2 4 2 4 3 4 4 3 3                                      |

Legend: 1-None 2-Some 3-Most of them 4-All

#### Table 21 – Work-Family Supportive Culture per Organization – Organizational Perspective

<table>
<thead>
<tr>
<th>Organizational Indicators (%)</th>
<th>BK1</th>
<th>BK2</th>
<th>BK3</th>
<th>RT1</th>
<th>RT2</th>
<th>RT3</th>
<th>TR1</th>
<th>TR2</th>
<th>TR3</th>
<th>UT1</th>
<th>UT2</th>
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<td>79.2</td>
<td>87.5</td>
<td>95.8</td>
<td>66.7</td>
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</table>

#### Table 22 – Overall Work-Family Organizational Indicators per Organization – Organizational Perspective

These indicators (see Table 22) are calculated as the percentage of achievement compared with an organization having all work-family policies accessible for everyone, no cultural hindrances, no cultural promoters and a supportive managerial attitude from all its managers / supervisors. The percentage is calculated based on the survey’s results.
## Appendix D. Survey – Staff results

### WFP - Work-Family Policies

In your firm, how many employees have access to?

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<tr>
<th></th>
<th>BK 1</th>
<th>BK 2</th>
<th>BK 3</th>
<th>RT 1</th>
<th>RT 2</th>
<th>RT 3</th>
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<td>P2. Part-time work</td>
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<td>1.7</td>
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<tr>
<td>P3. Half day free in exchange for working longer hours the rest of the week</td>
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<td>2.1</td>
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<td>P4. Reduced working hours in exchange for a lower salary</td>
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<td>P7. Leave of absence to take care of a family member</td>
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<td>1.9</td>
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<td>3.8</td>
<td>3.3</td>
<td>3.0</td>
<td>3.8</td>
<td>3.7</td>
<td>3.8</td>
<td>3.7</td>
<td>3.6</td>
<td>3.7</td>
<td>3.8</td>
<td>3.8</td>
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<tr>
<td>P28. Health care plan for family members</td>
<td>2.3</td>
<td>2.9</td>
<td>3.0</td>
<td>1.8</td>
<td>3.4</td>
<td>2.0</td>
<td>1.3</td>
<td>1.9</td>
<td>2.8</td>
<td>1.8</td>
<td>3.0</td>
<td>2.5</td>
</tr>
<tr>
<td>P29. Outplacement service for workers who leave the company due to restructuring or closure</td>
<td>1.9</td>
<td>1.8</td>
<td>1.9</td>
<td>1.8</td>
<td>2.6</td>
<td>2.0</td>
<td>1.4</td>
<td>1.7</td>
<td>1.6</td>
<td>1.4</td>
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<td>2.2</td>
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<tr>
<td>P30. Retirement plan</td>
<td>2.8</td>
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<td>3.1</td>
<td>2.0</td>
<td>2.8</td>
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<td>2.9</td>
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<td>2.2</td>
<td>2.1</td>
<td>3.3</td>
<td>2.7</td>
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<tr>
<td>P31. Canteen or allowance for lunch</td>
<td>3.8</td>
<td>3.8</td>
<td>3.8</td>
<td>3.9</td>
<td>3.9</td>
<td>3.9</td>
<td>3.6</td>
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<td>3.8</td>
<td>3.8</td>
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</tr>
</tbody>
</table>

Legend: 1= None 2= Some 3= Most 4= All

Table 23 – Work-Family Policies per Organization – Staff perspective
WFC - Work-Family Supportive Culture

C1. Employees are expected to take work home
C2. Rejecting a promotion or transfer for family reasons might affect an employee’s career in your company
C3. An employee that benefits from a leave of absence or a reduction in hours for family reasons is judged as being less committed to the company
C4. Employees are encouraged to go home after a certain time of day
C5. Decisions in the HR department take an employee’s family/personal situation into account
C6. Executives are understanding when employees put their families first

Legend: 1-Never 2-Occasionally 3- Often 4-Always

<table>
<thead>
<tr>
<th>C7. Managers/supervisors are sensitive to the importance of the work/family balance</th>
<th>BK 1</th>
<th>BK 2</th>
<th>BK 3</th>
<th>RT1</th>
<th>RT2</th>
<th>RT3</th>
<th>TR1</th>
<th>TR2</th>
<th>TR3</th>
<th>UT1</th>
<th>UT2</th>
<th>UT3</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1.9</td>
<td>2.3</td>
<td>3.0</td>
<td>2.8</td>
<td>3.4</td>
<td>3.3</td>
<td>2.5</td>
<td>1.9</td>
<td>2.2</td>
<td>2.1</td>
<td>2.4</td>
<td>2.8</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>C8. Managers/supervisors are an example of family-responsible behaviour</th>
<th>BK 1</th>
<th>BK 2</th>
<th>BK 3</th>
<th>RT1</th>
<th>RT2</th>
<th>RT3</th>
<th>TR1</th>
<th>TR2</th>
<th>TR3</th>
<th>UT1</th>
<th>UT2</th>
<th>UT3</th>
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<tbody>
<tr>
<td></td>
<td>1.9</td>
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<td>2.8</td>
<td>2.8</td>
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<td>2.2</td>
<td>2.2</td>
<td>2.3</td>
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Legend: 1-None 2-Some 3-Most of them 4-All

Table 24 – Work-Family Supportive Culture per Organization – Staff perspective

<table>
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<tr>
<th>Staff Indicators (%)</th>
<th>BK 1</th>
<th>BK 2</th>
<th>BK 3</th>
<th>RT1</th>
<th>RT2</th>
<th>RT3</th>
<th>TR1</th>
<th>TR2</th>
<th>TR3</th>
<th>UT1</th>
<th>UT2</th>
<th>UT3</th>
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</thead>
<tbody>
<tr>
<td>Work-Family Policies Indicator (swfp)</td>
<td>47.8</td>
<td>52.2</td>
<td>69.2</td>
<td>55.0</td>
<td>75.9</td>
<td>67.0</td>
<td>50.3</td>
<td>48.8</td>
<td>55.3</td>
<td>48.2</td>
<td>56.1</td>
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<tr>
<td>Work-Family Supportive Culture Indicator (swfc)</td>
<td>37.7</td>
<td>50.6</td>
<td>67.9</td>
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<td>84.0</td>
<td>77.6</td>
<td>54.6</td>
<td>42.2</td>
<td>46.0</td>
<td>46.2</td>
<td>48.8</td>
<td>55.6</td>
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Table 25 – Overall Work-Family Organizational Indicators per Organization – Staff perspective

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<thead>
<tr>
<th>Dimensions of Family-Supportive Culture</th>
<th>BK 1</th>
<th>BK 2</th>
<th>BK 3</th>
<th>RT1</th>
<th>RT2</th>
<th>RT3</th>
<th>TR1</th>
<th>TR2</th>
<th>TR3</th>
<th>UT1</th>
<th>UT2</th>
<th>UT3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time Demands and expectations</td>
<td>-2.8</td>
<td>-1.5</td>
<td>-0.6</td>
<td>-0.9</td>
<td>0.5</td>
<td>0.5</td>
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<td>-1.8</td>
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<td>Negative Career Consequences</td>
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<td>-0.1</td>
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<tr>
<td>Managerial Support</td>
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<td>2.9</td>
<td>2.8</td>
<td>3.4</td>
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<td>2.2</td>
<td>2.2</td>
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Table 26 – Dimensions of Family-Supportive Culture per Organization – Staff perspective
Appendix E. List of Interviews

<table>
<thead>
<tr>
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<tbody>
<tr>
<td>BK1</td>
<td>Human Resources Manager</td>
<td>BK2</td>
<td>Human Resources Manager</td>
<td>BK3</td>
<td>Human Resources Manager</td>
</tr>
<tr>
<td>BK10</td>
<td>Human Resources Manager</td>
<td>BK20</td>
<td>Human Resources Manager</td>
<td>BK30</td>
<td>Human Resources Manager</td>
</tr>
<tr>
<td>BK11</td>
<td>Human Resources – Technician</td>
<td>BK21</td>
<td>Human Resources – Technician</td>
<td>BK31</td>
<td>Risk – Analyst</td>
</tr>
<tr>
<td>BK12</td>
<td>Compliance - Administrative</td>
<td>BK22</td>
<td>Investment – Analyst</td>
<td>BK32</td>
<td>Information Systems - Engineer</td>
</tr>
<tr>
<td>BK13</td>
<td>Branch manager</td>
<td>BK23</td>
<td>Branch manager</td>
<td>BK33</td>
<td>Branch manager</td>
</tr>
<tr>
<td>BK14</td>
<td>Client manager</td>
<td>BK24</td>
<td>Client manager</td>
<td>BK34</td>
<td>Client manager</td>
</tr>
<tr>
<td>BK15</td>
<td>Commercial Director</td>
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<td>Commercial Director</td>
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</table>

<table>
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<tbody>
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<td>Human Resources Manager</td>
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<td>Interviewed</td>
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<td>Human Resources Manager</td>
</tr>
<tr>
<td>RT11</td>
<td>Commercial – Key Account</td>
<td>RT21</td>
<td>Human Resources – Administrative</td>
<td>RT31</td>
<td>Product Team Leader</td>
</tr>
<tr>
<td>RT12</td>
<td>Store manager</td>
<td>RT22</td>
<td>Commercial - Key Account</td>
<td>RT32</td>
<td>Logistics – Team Leader</td>
</tr>
<tr>
<td>RT13</td>
<td>Store manager</td>
<td>RT23</td>
<td>Planning - manager</td>
<td>RT33</td>
<td>Logistics – Co-worker</td>
</tr>
<tr>
<td>RT14</td>
<td>Logistics manager</td>
<td>RT24</td>
<td>Distribution – Team leader</td>
<td>RT34</td>
<td>Store team member</td>
</tr>
<tr>
<td>RT15</td>
<td>Customer Assistant</td>
<td>RT25</td>
<td>Plant manager</td>
<td>RT35</td>
<td>Store manager</td>
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<table>
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<tbody>
<tr>
<td>TR1</td>
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<td>TR2</td>
<td>Human Resources Manager</td>
<td>TR3</td>
<td>Interviewed</td>
</tr>
<tr>
<td>TR10</td>
<td>Human Resources Manager</td>
<td>TR20</td>
<td>Human Resources Manager</td>
<td>TR30</td>
<td>Human Resources Manager</td>
</tr>
<tr>
<td>TR11</td>
<td>Quality – Team Leader</td>
<td>TR21</td>
<td>CEO</td>
<td>TR31</td>
<td>Healthcare – Administrative</td>
</tr>
<tr>
<td>TR12</td>
<td>Planning engineer</td>
<td>TR22</td>
<td>Chief Operating Officer</td>
<td>TR32</td>
<td>Flight attendant</td>
</tr>
<tr>
<td>TR13</td>
<td>Bus route supervisor</td>
<td>TR23</td>
<td>Train attendant</td>
<td>TR33</td>
<td>Ground staff member</td>
</tr>
<tr>
<td>TR14</td>
<td>Bus driver</td>
<td>TR24</td>
<td>Head of train station</td>
<td>TR34</td>
<td>Maintenance engineer</td>
</tr>
<tr>
<td>TR15</td>
<td>Trainman</td>
<td>TR25</td>
<td>Train driver</td>
<td>TR35</td>
<td>Marketing - Technician</td>
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</table>

<table>
<thead>
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<th></th>
<th>Interviewed</th>
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<td>Human Resources Manager</td>
<td>UT3</td>
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<tr>
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<td>Human Resources Manager</td>
<td>UT20</td>
<td>Human Resources Manager</td>
<td>UT30</td>
<td>Human Resources Manager</td>
</tr>
<tr>
<td>UT11</td>
<td>Help center co-worker</td>
<td>UT21</td>
<td>Distribution - Engineer</td>
<td>UT31</td>
<td>Sustainability Manager</td>
</tr>
<tr>
<td>UT12</td>
<td>Finance - Controller</td>
<td>UT22</td>
<td>Corporate - Engineer</td>
<td>UT32</td>
<td>Commercial - Manager</td>
</tr>
<tr>
<td>UT13</td>
<td>Maintenance team supervisor</td>
<td>UT23</td>
<td>Commercial - Engineer</td>
<td>UT33</td>
<td>Commercial - Engineer</td>
</tr>
<tr>
<td>UT14</td>
<td>Toll team supervisor</td>
<td>UT24</td>
<td>Commercial - Administrative</td>
<td>UT34</td>
<td>Maintenance - Engineer</td>
</tr>
<tr>
<td>UT15</td>
<td>Toll attendant</td>
<td>UT25</td>
<td>Production - Engineer</td>
<td>UT35</td>
<td>Customer Assistant</td>
</tr>
</tbody>
</table>
Appendix F. Organisation - Analysis of Covariance

Analysis of covariance for work-family policies (organizational data)

```
          Number of obs = 22 2244 4477 7722 22
Root MSE   = 764.7266 72871.50
R-squared  = 0.9992

Source     Partial SS      df       MS           F     Prob > F
Model 271928.241     10 27192.8241 3.8e+03 0.0000
owfp 6644.72299     1 6644.72299 72871.50 0.0000
control 21309.01512     2 10654.5076 1.2e+03 0.0000
geography 1589.09531     1 1589.09531 17627.26 0.0000
tsize 28.2467941     1 28.2467941 309.72 0.0000
size 18537.4627     1 18537.4627 2.1e+03 0.0000
wmanag 2533.14508     1 2533.14508 27780.55 0.0000
wstaff 699041119     1 699041119 7.67 0.0000
absence 315.885981     1 315.885981 3464.27 0.0000
attrition 1670.48784     1 1670.48784 4213.58 0.0000
Residual 224.404106 2461 .09128415
Total 272152.645 2471 110.138666
```

Analysis of covariance for work-family culture (organizational data)

```
          Number of obs = 2472
Root MSE   = .994469
R-squared  = 0.9884

Source     Partial SS      df       MS           F     Prob > F
Model 207037.065     9 23004.1883 23260.80 0.0000
owfp 72964.0319     1 72964.0319 73777.93 0.0000
control 10832.6871     2 5415.3436 25709.97 0.0000
geography 452.576297     1 452.576297 457.62 0.0000
size 58096.0376     1 58096.0376 59550.78 0.0000
wmanag 14889.5186     1 14889.5186 15051.63 0.0000
absence 2840.40908     1 2840.40908 2871.09 0.0000
attrition 22181.9744     1 22181.9744 2203.46 0.0000
Residual 2434.83977 2462 .98896825
Total 209472.534 2471 .7727933
```
Appendix G. Staff - Analysis of Covariance

Analysis of covariance for work-family policies (staff data)

```
.mean swfp swfc gender age marital nchild age_young age_eldest work_level work_func pf_time spf_time nwhours,
> continuous(swfp nwhours)

Number of obs = 2472
Root MSE = 8.63025
R-squared = 0.5417
Adj R-squared = 0.5345

Source | Partial SS | df | MS | F | Prob > F
------ | ---------- | --- | --- | --- | --------
Model | 214154.614 | 38 | 5635.64774 | 75.67 | 0.0000
swfp | 180533.577 | 1 | 180533.577 | 2423.88 | 0.0000
gender | 682.310392 | 1 | 682.310392 | 9.16 | 0.0025
age | 810.667564 | 5 | 162.133113 | 2.18 | 0.0541
marital | 256.044803 | 4 | 64.0111008 | 0.76 | 0.5121
nchild | 577.099528 | 4 | 144.249826 | 1.27 | 0.2902
age_young | 654.00136 | 6 | 109.066933 | 1.47 | 0.1831
age_eldest | 776.004255 | 6 | 121.740708 | 1.62 | 0.1362
work_level | 2991.69979 | 3 | 997.22993 | 13.39 | 0.0000
work_func | 1138.47251 | 3 | 379.47583 | 5.09 | 0.0016
pf_time | 736.61017 | 3 | 245.34349 | 3.30 | 0.0197
spf_time | 76.374359 | 1 | 76.374359 | 0.81 | 0.0084
nwhours | 6.122.954 | 2433 | 74.482837 | 0.46 | 0.6444
Residual | 593707.529 | 2471 | 160.00047

Analysis of covariance for work-family culture (staff data)

```
.mean swfp swfc gender age marital nchild age_young age_eldest work_level work_func pf_time spf_time nwhours,
> continuous(swfp nwhours)

Number of obs = 2472
Root MSE = 14.7289
R-squared = 0.5433
Adj R-squared = 0.5362

Source | Partial SS | df | MS | F | Prob > F
------ | ---------- | --- | --- | --- | --------
Model | 590159.569 | 38 | 15531.462 | 76.18 | 0.0000
swfp | 494198.684 | 1 | 494198.684 | 2423.88 | 0.0000
gender | 445.438451 | 1 | 445.438451 | 2.18 | 0.1395
age | 339.26483 | 5 | 67.852966 | 3.12 | 0.0082
marital | 1069.82286 | 4 | 267.205664 | 1.31 | 0.2851
nchild | 1433.66737 | 4 | 358.416833 | 1.76 | 0.1346
age_young | 1359.52373 | 6 | 226.587283 | 1.34 | 0.3340
age_eldest | 2766.95685 | 6 | 461.159475 | 2.26 | 0.0352
work_level | 7891.94894 | 3 | 2630.6631 | 12.90 | 0.0000
work_func | 945.448344 | 3 | 315.15491 | 1.55 | 0.2007
pf_time | 406.410587 | 1 | 406.410587 | 1.99 | 0.1583
spf_time | 1307.8255 | 3 | 369.7252 | 1.81 | 0.1430
nwhours | 2604.20272 | 1 | 2604.20272 | 12.77 | 0.0004
Residual | 496058.329 | 2433 | 201.887516 | 0.0000

Total | 1086253.89 | 2471 | 439.600929 | 0.0000
```
Appendix H. Organisation – Factor analysis

Factor analysis of organizational data using principal component factors method

Factor analysis/correlation
Number of obs = 12
Method: principal-component factors
Retained factors = 2
Rotation: oblique promax (Kaiser off)
Number of params = 19

<table>
<thead>
<tr>
<th>Factor</th>
<th>Variance</th>
<th>Proportion</th>
<th>Rotated factors are correlated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Factor1</td>
<td>4.57738</td>
<td>0.4577</td>
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<tr>
<td>Factor2</td>
<td>3.04460</td>
<td>0.3045</td>
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</table>

LR test: independent vs. saturated: chi2(45) = 133.92 Prob>chi2 = 0.0000

Rotated factor loadings (pattern matrix) and unique variances

<table>
<thead>
<tr>
<th>Variable</th>
<th>Factor1</th>
<th>Factor2</th>
<th>Uniqueness</th>
</tr>
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<tr>
<td>control</td>
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<td>0.1981</td>
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<td>tsize</td>
<td>0.9512</td>
<td>-0.0665</td>
<td>0.0915</td>
</tr>
<tr>
<td>size</td>
<td>-0.1915</td>
<td>0.8807</td>
<td>0.1896</td>
</tr>
<tr>
<td>wmanag</td>
<td>0.6517</td>
<td>-0.1866</td>
<td>0.5495</td>
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<tr>
<td>wstaff</td>
<td>0.5235</td>
<td>0.7795</td>
<td>0.1296</td>
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<td>nonperm</td>
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Factor rotation matrix

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<td>Factor2</td>
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<td>0.9929</td>
</tr>
</tbody>
</table>

Factor score coefficients using the factor analysis above

Scoring coefficients (method = regression; based on promax(3) rotated factors)

<table>
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<th>Factor1</th>
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</thead>
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<tr>
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</tr>
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<tr>
<td>absence</td>
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<tr>
<td>attrition</td>
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<tr>
<td>owfp</td>
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<tr>
<td>owfc</td>
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<td>0.04778</td>
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</tbody>
</table>
Appendix I. Staff – Factor analysis

Factor analysis of staff data using principal component factors method

Factor analysis/correlation
Method: principal-component factors
Rotation: oblique promax (Kaiser off)

<table>
<thead>
<tr>
<th>Factor</th>
<th>Variance</th>
<th>Proportion</th>
<th>Rotated factors are correlated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Factor1</td>
<td>2.44825</td>
<td>0.2448</td>
<td></td>
</tr>
<tr>
<td>Factor2</td>
<td>1.94664</td>
<td>0.1950</td>
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</tr>
</tbody>
</table>

LR test: independent vs. saturated: \( \chi^2(45) = 4965.06 \) Prob > chi2 = 0.0000

Rotated factor loadings (pattern matrix) and unique variances

<table>
<thead>
<tr>
<th>Variable</th>
<th>Factor1</th>
<th>Factor2</th>
<th>Uniqueness</th>
</tr>
</thead>
<tbody>
<tr>
<td>swfp</td>
<td>0.8257</td>
<td>-0.1121</td>
<td>0.3251</td>
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<tr>
<td>swfc</td>
<td>0.8813</td>
<td>-0.0687</td>
<td>0.2313</td>
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<td>sw</td>
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<td>0.1023</td>
<td>0.3413</td>
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<tr>
<td>sf</td>
<td>0.5228</td>
<td>0.0146</td>
<td>0.7749</td>
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<td>0.5177</td>
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<td>0.0251</td>
<td>-0.4922</td>
<td>0.7597</td>
</tr>
<tr>
<td>nchild</td>
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<td>0.6090</td>
<td>0.5187</td>
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<td>0.6101</td>
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<tr>
<td>work_func</td>
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<td>0.4719</td>
<td>0.7490</td>
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</table>

Factor rotation matrix

<table>
<thead>
<tr>
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<th>Factor2</th>
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</thead>
<tbody>
<tr>
<td>Factor1</td>
<td>0.9755</td>
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<tr>
<td>Factor2</td>
<td>-0.2201</td>
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Factor score coefficients using the factor analysis above

Scoring coefficients (method = regression; based on promax(3) rotated factors)

<table>
<thead>
<tr>
<th>Variable</th>
<th>Factor1</th>
<th>Factor2</th>
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</thead>
<tbody>
<tr>
<td>swfp</td>
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</tr>
<tr>
<td>swfc</td>
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<td>sw</td>
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<tr>
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</tr>
<tr>
<td>nchild</td>
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<td>0.35997</td>
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<tr>
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<tr>
<td>work_func</td>
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<td>0.24874</td>
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