

# Implementation and Status of Work-Life Balance Viewed from Matching Data

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## I. Advancement of WLB Research

Studies on work-life balance (hereinafter referred to as “WLB”) have rapidly advanced in Japan for these two years. The status of “win-win,” which is the essence of WLB, is indispensable in terms of productivity in a sense that it not only satisfies employee needs but also benefits a company for increased profit. Studies have newly appeared focusing on it. Many studies have recently been conducted from different angles by the Workshop Related to WLB Support and Business Performance (2006). The studies include Takeishi (2006), Abe and Kurosawa (2006) and Wakisaka (2006). Abe and Kurosawa (2006) point out that the introduction of programs for child care leave and short-time work decreases sales on a short-term basis but has a positive effect on ordinary profit on a long-term basis.

Moreover, an increasing number of studies have focused not only on companies but also on how managers and staff members understand WLB programs and how they react. The complete analysis of it requires the data matched with companies, managers and staff members. Some such data have become available. Mitani (1995) is the pioneering study analyzing matching data concerning human resources management systems and salary disparity between male and female workers. This study was followed by Abe (2005), which began using matching data for WLB. The three data used in this paper are all matching data.

The following are reasons why matching data are required. Three levels can be considered as the subjects of WLB studies, namely (a) companies, (b) managers and (c) general staff members. Mainly studies (a) have been so far accumulated. For example, a study discusses whether the establishment of child care leave program has an effect on the continuous work service of female workers. The Workshop Related to WLB Support and Business Performance (2006) has specifically introduced the angle of company performance, discussing whether WLB-oriented companies generate good business results, whether employees’ willingness to work is high from the company’s point of view, and

whether the retention rate is high. However, how employees feel about WLB programs and react accordingly is also important. Studies (c) have traditionally accumulated information related to “willingness to work” and “job satisfaction.” WLB studies, however, are such that they not only discuss the reactions to WLB support programs but also review the programs from the angle of productivity increase. This sufficient analysis definitely requires the studies focusing on (b) managers. This is because it is managers that define and allocate jobs, determine business objectives and evaluate employees. How they understand WLB and act accordingly is an important study theme. What makes it easier to identify issues and problems are not the studies that survey and analyze these three levels at random but the studies that identify how managers and staff members working in the companies where the implementation of WLB programs are advanced (or delayed) feel about WLB programs. To achieve this objective, matching data are indispensable.

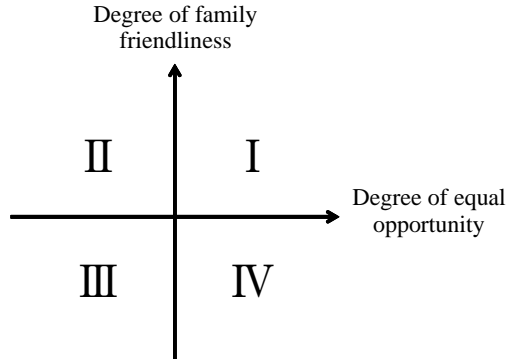
## **II. WLB and Company Performance**

### **1. Equal Opportunity and Family Friendliness**

For these years I have pointed that the strategies of business firms vary depending on the relationship between their degrees of the equal opportunity and family friendliness, because the expansion of employment of women requires equal opportunity for men and women as well as family friendliness (Wakisaka 2001a, 2001b, 2001c). In the US and UK, an increasing number of researches have also taken up the relationship among the equal opportunity, family friendliness and high-involvement management (Wood=De Menezes [2007]) for prospect). I have developed a 4-quadrant-division concept on the basis of the degrees of equal opportunity and family friendliness and conducted 4-quadrant analysis (Figure 1).

The recent enrichment of data has enabled extensive experimental studies. According to the 4-quadrant analysis using the data of the survey conducted by NLI Research Institute in 2005 (NLI data: valid responses from 446 of 3,464 listed and unlisted companies with 301 to 2,000 employees, which were chosen from the Company Handbook and were subject to this postal mail survey), the companies showing higher degrees of equal opportunity and family friendliness generated larger ordinary profits (Wakisaka 2006).

**Figure 1. Sketch of degree of employing female workers**



## 2. Data

The data of Japan Institute for Labour Policy and Training (JILPT) used in this section far exceed the NLI data in terms of the number of samples, and are designed to match details of the company responses by manager class and general staff class. The “Survey on Support for Balancing Work and Family” conducted by JILPT in 2006 consists of a survey covering the companies classified by industry and scale and selected at random (6,000 companies having no less than 300 employees in Japan) and a survey on the employees of these companies. In order to conduct the employee survey, JILPT requested to distribute survey scripts to 30,000 managers working in the companies (which represent 5 managers in each of the companies) and 60,000 general staff members working in the companies (which represent 10 staff members in each of the companies). Valid responses were collected from 863 companies (response ratio of 14.3%) during the company survey, 3,299 managers (response ratio of 10.9%) during the manager survey and 6,529 staff members (response ratio of 10.8%) during the general staff survey. (Refer to Wakisaka [2007b] for details of the following analysis results.)

I first identified the degrees of equal opportunity and family friendliness on the basis of the company survey data (refer to Appendix), set average figures of equal opportunity and family friendliness as x-axis and y-axis, respectively, and then made four quadrants as illustrated in Figure 1 above. In this paper, let me call the company that is located in the 1st quadrant scoring high degrees of equal opportunity and family friendliness as a “gender-equal” company, the company that is located in the 2nd quadrant scoring a low degree of equal

opportunity and a high degree of family friendliness as a “family-friendliness-oriented” company, the company that is located in the 4th quadrant scoring a high degree of equal opportunity and a low degree of family friendliness as an “equal-opportunity-oriented” company, and the company that is located in the 3rd quadrant scoring low degrees of equal opportunity and family friendliness as a “male-oriented” company. Identifying the characteristics of companies located in each quadrant, I will analyze which quadrant shows a greater effect on company performance and to what extent WLB policies have an effect on company performance.

### **3. Effect on Company Performance**

Table 1 shows effects on financial performance.

Wakisaka (2006), using NLI data, indicates that the “gender-equal” companies in the 1st quadrant increased only ordinary profit per head, while the JILPT data indicate that the companies increased both sales per head and ordinary profit per head. Seeing variances with coefficient of variance, you will notice that the variance of sales per head of “gender-equal” companies is similar to the average but the variance of their ordinary profit per head is quite small. You are now aware that the company scoring high degrees of both equal opportunity and family friendliness secures larger profits. The scores compared with 5 years ago (average of 3.83 and 1.74 for the 1st quadrant) also indicate that the “gender-equal” company achieved best results in both sales and ordinary profit. The subjective performance compared with other companies in the same industry shows that the “gender-equal” company achieved top scores in all of the items. Regarding the items in which the “gender-equal” company achieved top scores, I conducted t-test in order to confirm whether its scores are significantly high in a statistical sense comparing with other companies. As a result, as indicted in the right end column of Figure 1, these scores have proved to be significantly high except for sales compared with those of other companies in the same industry.

To what extent the degrees of equal opportunity and family friendliness have an effect on performance has been estimated by OLS under the control of business scale and kind of industry. As a result, the degrees of family friendliness and equal opportunity have no effect on sales per head but have a significantly positive effect on ordinary profit per head. In other words, the company scoring a higher degree of family friendliness (in the level of 10%)

**Table 1. Company performance by quadrant (large samples)**

		Gender-equal	Equal-opportunity-oriented	Family-friendliness-oriented	Male-oriented	Total	t-test
		1st quadrant	4th quadrant	2nd quadrant	3rd quadrant		
		High degree of equal opportunity High degree of family friendliness	High degree of equal opportunity Low degree of family friendliness	Low degree of equal opportunity High degree of family friendliness	Low degree of equal opportunity Low degree of family friendliness		
N		232	118	119	246	715	
Total		32.5	16.5	16.6	34.4	100	
Financial data	Sales per head (million yen)	102.29	85.4	67.34	62.1	78.89	*
	Ordinary profit per head (million yen)	3.98	2.25	3.36	1.45	2.66	**
Scores compared with 5 years ago	Sales	3.47	2.86	3.17	3.23	3.23	**
	Ordinary profit	3.48	2.87	3.22	3.21	3.24	***
	Productivity	3.54	3	3.57	3.26	3.35	
Scores compared with other companies in the same industry	Sales	3.28	3.1	3.05	3.2	3.18	0
	Ordinary profit	3.15	3.03	2.75	3.02	3.02	*
	Productivity	3.15	2.95	2.92	3.02	3.03	*
No less than 10% increase from 2000	Regular employees	27.6	19.5	11.7	19.5	20.8	
	Temporary employees	41.3	43.5	41.8	40.7	41.5	
	Dispatched workers	40.9	31.9	47.1	34.5	38.1	
	Contracted workers	16.6	9.5	15.8	12.4	13.7	

Note: T-test of figure of top item in the 1st quadrant comparing with figures of companies in the other quadrants.

\*\*\*Significant at 1%, \*\*significant at 5%, and \*significant at 10%.

and a higher degree of equal opportunity (in the level of 1%) earns higher ordinary profit per head. The comparisons with 5 years ago and with other companies in the same industry have been made based on the estimation by ordered profit. According to the comparison with 5 years ago, the degree of equal opportunity has no relation with productivity, but the degree of family friendliness has a significantly positive effect on it. Namely, the company scoring a high degree of family friendliness enjoys high productivity. The “gender-equal” company increases all sales, ordinary profit and productivity from 5 years ago. The comparison with other companies in the same industry reveals that there are less indices showing significance. The company scoring a high degree of equal opportunity earns high ordinary profit. Moreover, the company scoring a high degree of equal opportunity is ahead of other companies in the same industry in terms of sales, ordinary profit and productivity. As a whole, almost all coefficients are positive, and it is unthinkable that high degrees of equal opportunity and family friendliness have any negative impact on performance.

#### **4. Differences in Awareness of Actual WLB Status among Persons Responsible for Human Resources Management, Managers and Staff Members**

I have analyzed how a company (persons responsible for human resources management), managers and staff members are aware of the status of equal opportunity and family friendliness of their company. I have made 5-point method scores based on the assumption that 5 points is for the case of being “applicable,” 4 points is for the case of being “more or less applicable,” 3 points is for the case of being “unable to say applicable or not applicable,” 2 points is for the case of being “not much applicable” and 1 point is for “not applicable.”

Consequently, the recognition scores of company, managers and general staff members become lower in all of the items in the order of company, manager and staff member. Significant differences are found especially in the items, “your company is requesting your boss and colleagues to cooperate with you at the time of your absence or short-time work related to child care,” “your company is striving to let all employees know its system of child care leave and other systems for supporting the balancing of work and family” and “your company is trying to train its employees regardless of gender.” According to

analysis by quadrant, the points of equal opportunity items become smaller almost in the order of “gender-equal,” “equal-opportunity-oriented,” “family-friendliness-oriented” and “male-oriented” in terms of company, managers and staff members; and the points of family friendliness items become smaller almost in the order of “gender-equal,” “family-friendliness-oriented,” “equal-opportunity-oriented” and “male-oriented” in terms of company, managers and staff members. Managers and staff members do not think that equal opportunity and family friendliness have been put into practice as extensively as the company (a person responsible for human resources management) thinks. In comparison with same managers and staff members, they feel that the company scoring higher degrees of equal opportunity and family friendliness has made a more progress in the equal opportunity and family friendliness.

According to the manager survey, the companies whose workplaces are in a mood to most positively support employees when receiving an application for child care leave are “gender-equal” companies, in which managers replying in favor of the application account for 49.1%, nearly a half. On the other hand, in “equal-opportunity-oriented” companies, such managers account for 36.8%, the lowest percentage among all companies; and managers replying as “inconvenient” or “no response” share as much as nearly 20%. When receiving an application for short-time work, 40% of the managers of “gender-equal” companies reply as “supporting positively.”

When we see managers’ responses to the case that supposes that a male employee applies for child care leave, 52.6% of all managers reply “there are issues to be solved but I will vote for the application,” and 21.8% of the managers reply as “positively voting for the application.” The managers of “gender-equal” companies positively vote for the application, which account for 29.1%, the highest percentage among all companies.

In the companies scoring high degrees of equal opportunity and family friendliness, nearly 30% of the managers now have an opinion that it is natural for male employees to take child care leave. In “male-oriented” companies, such managers account for 17.0%, the lowest percentage among all companies.

Managers who have worked with a staff member that used a family friendly system in the past, think that their company has made a steady progress in terms of equal opportunity and family friendliness. Managers and staff members who used a family friendly system in the past also think that their company has made a steady progress in terms of equal opportunity and family friendliness.

**Table 2. Perception score on employment of female workers  
(equal opportunity and family friendliness)**

		Company (1)	Manager (2)	Staff (3)	(1)-(2)	(1)-(3)	(2)-(3)
Extensively employing and adopting female employees.	Gender-equal	4.38	3.55	3.46	0.82	0.92	0.09
	Equal-opportunity-oriented	4.22	3.55	3.47	0.68	0.75	0.08
	Family-friendliness-oriented	3.63	3.16	3.00	0.48	0.63	0.15
	Male-oriented	3.24	3.06	2.88	0.18	0.36	0.18
	Total	3.83	3.34	3.18	0.49	0.65	0.16
Nurturing and training employees regardless of gender	Gender-equal	4.80	3.72	3.49	1.08	1.31	0.23
	Equal-opportunity-oriented	4.66	3.63	3.39	1.03	1.26	0.23
	Family-friendliness-oriented	4.33	3.48	3.12	0.85	1.21	0.36
	Male-oriented	3.81	3.17	2.85	0.64	0.96	0.32
	Total	4.35	3.49	3.17	0.86	1.18	0.32
Letting female employees engage in creative jobs rather than routine jobs	Gender-equal	4.50	3.65	3.46	0.85	1.03	0.18
	Equal-opportunity-oriented	4.33	3.40	3.25	0.93	1.09	0.15
	Family-friendliness-oriented	3.99	3.39	3.05	0.60	0.94	0.34
	Male-oriented	3.38	3.06	2.77	0.33	0.61	0.29
	Total	3.99	3.38	3.10	0.62	0.89	0.27
Employees are fully aware of the measures to be taken if they suffer damage such as sexual harassment and bullying.	Gender-equal	4.54	3.77	3.32	0.77	1.22	0.45
	Equal-opportunity-oriented	4.28	3.61	3.15	0.67	1.12	0.46
	Family-friendliness-oriented	4.36	3.76	3.19	0.60	1.17	0.56
	Male-oriented	3.78	3.43	2.94	0.35	0.84	0.49
	Total	4.20	3.62	3.12	0.58	1.08	0.50
Letting all employees know the company system for supporting the balancing of work and family	Gender-equal	4.72	3.69	3.27	1.03	1.45	0.42
	Equal-opportunity-oriented	4.21	3.38	2.90	0.83	1.31	0.48
	Family-friendliness-oriented	4.61	3.63	3.13	0.98	1.48	0.50
	Male-oriented	3.87	3.15	2.75	0.72	1.12	0.40
	Total	4.31	3.44	2.98	0.88	1.33	0.45
Asking employees to continue to work in the workplace after their marriage and child birth	Gender-equal	4.51	3.64	3.27	0.87	1.24	0.37
	Equal-opportunity-oriented	3.91	3.39	3.02	0.52	0.89	0.37
	Family-friendliness-oriented	4.18	3.50	3.03	0.68	1.15	0.47
	Male-oriented	3.47	3.13	2.80	0.34	0.67	0.34
	Total	3.99	3.41	3.01	0.58	0.98	0.40
Recommending even male employees to positively take child care leave	Gender-equal	3.53	2.49	2.20	1.04	1.34	0.30
	Equal-opportunity-oriented	2.75	2.22	1.94	0.53	0.80	0.27
	Family-friendliness-oriented	3.35	2.52	2.02	0.83	1.33	0.50
	Male-oriented	2.36	2.13	1.79	0.23	0.57	0.34
	Total	2.95	2.30	1.97	0.65	0.98	0.34
Requesting bosses and colleagues to understand employees' responsibilities for family care	Gender-equal	3.83	2.86	2.62	0.97	1.21	0.24
	Equal-opportunity-oriented	3.20	2.70	2.45	0.50	0.75	0.25
	Family-friendliness-oriented	3.68	2.90	2.43	0.78	1.25	0.46
	Male-oriented	2.84	2.63	2.33	0.21	0.51	0.30
	Total	3.34	2.76	2.44	0.58	0.90	0.32



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from Matching Data

		Company (1)	Manager (2)	Staff (3)	(1)-(2)	(1)-(3)	(2)-(3)
Requesting bosses and colleagues to cooperate with employees for absence and short-time work related to child care	Gender-equal	4.33	3.11	2.79	1.21	1.54	0.33
	Equal-opportunity-oriented	3.73	2.82	2.51	0.91	1.22	0.32
	Family-friendliness-oriented	4.23	3.15	2.66	1.09	1.57	0.49
	Male-oriented	3.16	2.63	2.36	0.53	0.80	0.27
	Total	3.79	2.90	2.55	0.90	1.25	0.35
Employees are in a position to take child care leave freely.	Gender-equal		3.11	3.21			-0.10
	Equal-opportunity-oriented		2.82	2.81			0.02
	Family-friendliness-oriented		3.15	3.17			-0.02
	Male-oriented		2.63	2.65			-0.02
	Total		2.90	2.92			-0.02
Employees are in a position to freely choose short-time work, etc. for balancing work and family.	Gender-equal		2.95	2.69			0.25
	Equal-opportunity-oriented		2.57	2.30			0.27
	Family-friendliness-oriented		2.81	2.61			0.21
	Male-oriented		2.38	2.21			0.18
	Total		2.66	2.43			0.23
In the company, there are good examples of female employees balancing work and family.	Gender-equal		3.41	3.23			0.18
	Equal-opportunity-oriented		3.14	2.91			0.23
	Family-friendliness-oriented		3.34	3.19			0.16
	Male-oriented		2.91	2.83			0.08
	Total		3.18	3.01			0.17
In the company, there are good examples of male employees engaged in child care.	Gender-equal		2.11	2.05			0.06
	Equal-opportunity-oriented		1.96	1.93			0.03
	Family-friendliness-oriented		2.10	2.01			0.08
	Male-oriented		1.80	1.81			-0.02
	Total		1.98	1.94			0.04
Employees believe that they can continue to work in their company after their marriage and child birth.	Gender-equal		3.71	3.40			0.31
	Equal-opportunity-oriented		3.43	3.05			0.38
	Family-friendliness-oriented		3.80	3.44			0.36
	Male-oriented		3.18	2.95			0.24
	Total		3.49	3.17			0.33
	Number of samples	Manager	Staff				
	Gender-equal	784	1522				
	Equal-opportunity-oriented	432	843				
	Family-friendliness-oriented	374	703				
	Male-oriented	846	1565				
	Total	2959	5755				

Notes : 1 The above figures are the results of 2,959 managers and 5,755 general staff members. Valid responses are from 3,299 managers and 6,529 general staff members. When indices are calculated, the companies that did not reply to each item are excluded. Therefore, the number of samples has become smaller.

2 Results by 5-point method. No response is zero point.

### **III. Workers of Japanese Electrical Electronic & Information Union and WLB**

#### **1. Data**

The data used in this section are from the questionnaire survey conducted in 2006 by “the 21st-century Life Vision Workshop” (project manager: Wakisaka) organized by Japanese Electrical, Electronic & Information Union (hereinafter referred to as “Union” and hereinafter this data being referred to as “Union Data”). This survey covered not only 4,388 Union members (hereinafter referred to as “valid responses”) but also 101 companies of the Union, 504 Union members who returned to their original company from their child care leaves within 5 years (according to system usage survey), and 501 persons who were the members’ bosses when the members returned from the leave (according to manager survey). The Union had endeavored to construct systems for supporting the balancing of work and family, including a diversified working system, before relevant laws and regulations were established. For example, mainly large companies already established and introduced the child care leave system in 1990, two years before the Child Care Leave Act was enacted, the family-care leave system in 1992, 7 years before the system was obligated by an act, as well as the system of extending employment period up to the age of 65 in 2000, 6 years before the enforcement of the revised Act concerning Stabilization of Employment of Older Persons. Thus, various systems were already established and introduced ahead of the times. Therefore, the issues of family friendliness and WLB are focused on the specific operation of the systems rather than the introduction or enrichment of the systems.

Union Data reflect many survey items across the entire WLB, including questions about personnel appraisal. My analysis will focus on the personnel appraisal. Before starting the analysis, I will introduce two theses using these data. The WLB helps improve company performance partly because it boosts employees’ motivation to work. According to Takeishi (2007), “in the companies striving to have WLB measures well accepted in the workplaces, employees’ motivation is bolstered,” and “high performers (those who are quickly promoted) are encouraged to work hard but are dissatisfied with the present status of WLB.” The fact that the stance of companies toward WLB is found to have a relationship with employees’ motivation to work suggests the importance of not only introduction of WLB-related systems but also positive evaluation and

systematic operation of the systems in an entire company.

Sato (2007) reveals that working form is vital to consider the degree of employees' WLB satisfaction. The degree of employees' WLB satisfaction is based on the reply made to the question, "Are you satisfied with your present balance of work and private life (time allocation)?" Generally, short-time work contributes to the WLB satisfaction but flexible working-time systems such as the flextime system and free-time system do not necessarily contribute to the WLB satisfaction. The WLB satisfaction rather depends on the degree of the flexibility that employees are provided with in selecting the volume of their assignment. This flexibility will become increasingly important for discretionary workers as well as Union workers in the future. The fact that not only "work procedure" but also "work volume" are important suggests the importance of human resources management and job management at the level of workplaces. For example, how a manager sets objectives for his/her staff members, allocates assignments to them or evaluates their performance will have an impact on improvement in the WLB satisfaction.

## **2. Child Care Leave, Child Care Short-time Work and Personnel Appraisal**

We now analyze the relationship between taking child care leave and child care short-time work, and personnel appraisal. (For further details, refer to Wakisaka [2007a].) Most of the companies replying to questionnaires have introduced a performance-based personnel pay system.

### **(1) Appraisal Policy and Actual Status**

According to the policies adopted by companies in relation to the first personnel appraisal conducted after a child care leave taker returns to its workplace (especially the period subject to appraisal), 49.5% of the companies apply "achievements during the period including child care leave," and 32.7% of the companies apply "the period after his/her return, excluding child care leave." Only 6.9% of the companies apply "capabilities at the present time," and quite a few companies apply "average appraisal of all employees," or "lowest points of appraisal for child care leave period." Meanwhile, how do the managers who have a child care leave taker as their staff member actually evaluate the member? "Achievements during the period including child care leave" is applied by 26.1% of the managers, the second largest number, while "the period after his/her return, excluding child care leave days" is applied by

**Table 3. Evaluation of “child care leave takers”**

(%)

Company Manager	Evaluate on the basis of achievements after return to workplace	Evaluate on the basis of achievements during the total period including child care leave	Evaluate on the basis of capabilities at the present time
Evaluate on the basis of achievements after return to workplace	38.9	29.5	42.9
Evaluate on the basis of achievements during the total period including child care leave	20.4	31.8	23.8
Evaluate on the basis of capabilities at the present time	24.1	15.0	23.8
Adopt average of all employees	0.9	2.3	4.8
Adopt the appraisal made just before taking the leave	4.6	5.8	4.8
Adopt the lowest appraisal during the leave period	6.5	8.1	
Others	4.6	7.5	
Total	100.0	100.0	100.0
N	108	173	21

35.4% of the managers, the largest number. According to the matching data of Table 3, the companies in which appraisal policy and actual appraisal method are consistent with each other represent 38.9% in the case of the companies applying “the period after his/her return, excluding child care leave,” 31.8% in the case of the companies applying “achievements during the period including child care leave,” and 23.8% in the case of the companies applying “the capabilities at the present time.” Thus, in an overwhelming number of cases, at no less than 70%, the company appraisal policy and actual appraisal method are inconsistent with each other.

It appears that the reason for generating such a big difference is that there is insufficient communication between human resources department and line managers.

According to the company survey asking about appraisal policy adopted by companies and actual appraisal method adopted by managers, a little less than

60% of the companies also adopt the policy of “evaluating (child care) short-time workers on the basis of ‘achievements per hour.’” As a policy, 15% of the companies apply “minus points to reduction in work volume,” but a little more than 20% of the companies adopt a policy of applying minus points to the reduction in work volume that includes “no flexibility” and “making job assignments easier.” On the other hand, when managers actually evaluate their staff member who has returned to his/her workplace, a little more than 60% of the managers apply the method of “evaluating the member on the basis of achievements per hour,” approximately 12% of the managers apply “minus points to reduction in work volume” and “no flexibility,” and approximately 30% of the managers apply “minus points to reduction in work volume,” “no flexibility” or “making job assignments easier.”

The cases where the same appraisal method is applied according to the matching data represent 62.0% for “evaluating on the basis of achievements per hour,” 20.8% for “applying minus points to reduction in work volume,” and 9.0% for “others.” Of the companies adopting the policy of “evaluating on the basis of achievements per hour,” approximately 30% of managers apply minus points to reduction in work volume. Adversely, of the companies adopting the policy of “applying minus points to reduction in work volume,” 45.8% of managers “evaluate on the basis of achievements per hour.”

## **(2) Guiding Appraisal Method and Providing Information**

According to the company survey, the companies guiding the method of appraising child care leave takers and providing information (hereinafter collectively referred to as “providing information”) account for 79.2% of all companies, while the companies providing no information account for 20.8%. According to the manager survey, however, the companies providing information account for 41.1%, while the companies providing no information account for 58.9%. Only 37.1% of the managers of the companies providing information reply that they were provided with such information, while as many as 52.5% of them reply that no information was provided. Moreover, 22.2% of the managers of the companies providing no information reply that their company provided information (Table 4).

According to analysis on short-time workers, only 30.5% of the managers of the companies providing information reply that “their company provided information,” while as many as 61.1% of the managers reply that “their company

**Table 4. Providing information related to appraisal of child care leave takers** (%)

Manager \ Company	Providing information	Providing no information
Information provided	37.1	22.2
No information provided	52.5	59.3
No reply	10.4	18.5
Total	100.0	100.0
N	413	27

provided no information.” On the contrary, 32.4% of managers of the companies providing no information reply that “their companies provided information.”

### (3) Results of Appraisal of Child Care Leave Takers

The manager survey asks how a manager actually evaluated child care leave takers. The results show that 2.6%, 48.9% and 32.1% of the managers reply that their appraisal results became “higher than average,” “almost in the level of average,” and “lower than average,” respectively.

On checking if the fact that the employees subject to this appraisal returned to their workplace as either full-time workers or short-time workers is related to appraisal results, it was found that the results do not much vary depending on the working style, and that they are only a little in favor of short-time workers as indicated in Table 5.

Table 6 shows the relationship between appraisal results and the satisfaction level of the above workers. The child care leave takers who obtained higher scores tend to be satisfied with the appraisal results, but the satisfaction level of those who obtained higher scores and the satisfaction level of those who obtained “average” scores are almost the same. One-fourth of those who obtained lower scores are satisfied but naturally a majority of them are dissatisfied. The managers who give them high scores evaluate them on the basis of “performance after return” and “capabilities at the present time,” while the managers who give them lower scores evaluate them on the basis of “the period including child care leave.”

**Table 5. Taker appraisal results**

	(%)	
	Short-time worker	Full-time worker
Higher than average	3.3	2.6
Almost average	52.3	46.8
Lower than average	30.0	34.0
No reply	14.4	16.7
Total	100.0	100.1
N	243	156

**Table 6. Appraisal results and satisfaction level**

Taker appraisal results	First appraisal after return to workplace			
	Satisfied	Medium	Dissatisfied	Total
Higher than average	45.5	36.4	18.2	100.0
Almost average	43.2	38.5	18.2	100.0
Lower than average	25.8	34.4	39.8	100.0
No reply	48.0	28.0	24.0	100.0
Total	37.9	36.1	26.0	100.0

#### (4) Effect on Workplace

We now examine how managers consider the positive or negative effect of short-time work system on their workplaces and how short-time work affects their actual appraisals. We also consider which issues or problems adversely affect their appraisals.

The managers who consider positive effect to be greater, negative effect to be greater and both effects to be “almost equal” account for 14.0%, 22.6% and 62.1%, respectively, indicating that negative effect is a little greater. According to actual appraisals, 8.8% (or three) of the managers who consider there is a positive effect provide scores higher than average, while only 14.7% of them provide scores lower than average. On the other hand, 40.0% of the managers who consider negative effect to be greater provide scores lower than average.

According to Table 7 on relationship between personnel appraisal and the specific effects considered by managers (plural answers from 10 items), 46.7% of the managers who reply “there were problems related to dealing with customers and suppliers,” mark lower scores, and 40.0% of the managers who reply “other members have worked more efficiently,” also mark lower scores.

**Table 7. Specific effects of short-time work on workplaces and appraisal**  
(%)

	Taker appraisal results					N
	Higher than before	Almost average	Lower than before	No reply	Total	
No particular effect	3.3	58.3	28.3	10.0	100.0	60
Other colleagues have borne increased burden.	1.7	49.2	35.8	13.3	100.0	120
There were problems related to dealing with customers, etc.	0.0	53.3	46.7	0.0	100.0	15
Communication becomes less smooth in the workplace.	0.0	61.3	22.6	16.1	100.0	31
Feeling of unfairness is among section members.	5.9	52.9	35.3	5.9	100.0	17
Good opportunity to review the way of working	4.8	61.9	19.1	14.3	100.0	21
Good opportunity to review assignments	5.3	51.6	25.3	17.9	100.0	95
Members have worked more efficiently.	5.0	42.5	40.0	12.5	100.0	40
Members assigned additional jobs have demonstrated greater capability.	0.0	54.2	29.2	16.7	100.0	24
Members are more conscious about the time of closing meetings.	6.1	45.5	21.2	27.3	100.0	33
Others	0.0	33.3	50.0	16.7	100.0	12

This can be understood as the case that managers mark lower scores for the child care leave taker but the short-time work has a positive effect on the taker's colleagues. A relatively larger number of managers who mark lower scores reply "colleagues have borne increased burdens" and "feeling of unfairness is among section members." As small as 22.6% of the managers who reply "communication becomes less smooth in the workplace" mark lower scores.

Meanwhile, only 19.1% of the managers who reply "our staff members have an opportunity to review their lifestyles and their way of working" mark lower scores. Also, 21.2% and 6.1% (two) of the managers who reply "our



section members become more conscious about the time of closing meetings” mark lower scores and higher scores, respectively. Similarly, 25.3% and 5.3% (five) of the managers who reply “our section members have an opportunity to review the methods of allocating assignments and proceeding with these,” mark lower scores and higher scores than average, respectively.

##### **(5) Level of Satisfaction with Appraisal Results and Desired Appraisal Method**

The survey asks child care leave takers if they are satisfied or dissatisfied with the results of first personnel appraisal made after their return to their workplaces. The results show that 14.5% and 16.5% of them reply, “I have not yet had personnel appraisal” and “I do not know,” respectively. Meanwhile, 25.4% of them reply “satisfied” and 18.5% of them reply “dissatisfied,” showing that satisfied persons are a little more than dissatisfied persons.

I have made satisfaction scores using 5-point method, except for samples of “having no personnel appraisal” and of “I do not know.” According to the analysis by work style after return, short-time workers are more satisfied (58.5%) than full-time workers (39.8%). The former is 3.17 and the latter is 2.93. By the workplace to which child care leave takers returned, the satisfaction level was low when the leave takers returned to a different workplace from before or when the leave takers were assigned to different work from before.

According to Table 8 on changes in content and volume of jobs assigned to child care leave takers after their return, the changes vary from one person to another so largely that it is difficult to identify any pattern from the changes. The table shows that 47.6% of the short-time workers are assigned the almost same volume of jobs as before. The numbers of short-time workers who are assigned the same content of jobs and the different content of jobs are almost equal. Meanwhile, 23.6% of the full-time workers are assigned reduced volume of jobs. Two-thirds of them are assigned the same content of jobs.

As for short-time workers, those whose job content is changed but whose job volume is almost the same are more satisfied with their appraisal results (3.26), while those whose job volume is reduced are not so satisfied (3.20 for same content and 3.22 for changed content). As for full-time workers, those whose “job content is changed and whose job volume is reduced” are most satisfied (3.33), but those whose job content is changed and whose job volume is the same are most dissatisfied (2.52). Short-time workers and full-time workers show different satisfaction results.

**Table 8. Comparison of content and volume of jobs between before and after child care leave**

	Short-time worker		Full-time worker	
	N	%	N	%
The content and volume of jobs are both almost the same.	73	25.4	91	44.8
Job content is the same but job volume is reduced.	65	22.6	23	11.3
Job content is changed but job volume is the same.	64	22.2	49	24.1
Job content is changed and job volume is reduced.	61	21.2	25	12.3
Others	25	8.7	15	7.4
Total	288	100.0	203	100.0

I have conducted ordered probit analysis in order to identify factors of determining the five levels of child care leave takers' satisfaction with appraisal results. Those who reply "I do not know" and "I do not have personnel appraisal" are excluded from survey samples. Positive coefficient means that the satisfaction level is high, while negative coefficient means that the dissatisfaction level is high.

First, according to the estimation using only workplace return dummy, workplace change dummy and job content and volume change dummy, which are workplace return coefficients, as explanatory variables, full-time workers seem less satisfied than short-time workers but the coefficient is only a little less significant. The only significant coefficients are for the stronger dissatisfaction of six child care leave takers who return and are transferred to "other workplaces" in comparison with those who return to "the same workplaces as before."

According to the estimation using additional information such as gender dummy, age (including the squared term), job tenure (including the squared term), educational background, job title, job rank, working style and salary, the workplace return coefficients are for the strong dissatisfaction of those who return and are transferred to "other workplaces." The strong dissatisfaction of the six male workers has nothing to do with their age, job tenure and working style. According to the analysis by educational background (junior high school as standard), the level of satisfaction of vocational school graduates is high.

According to the analysis by job title (product assembly as standard), the level of dissatisfaction of those engaged in system engineering, technical development or designing is high. According to the analysis by job rank (general staff as standard), the level of dissatisfaction of group leaders and managers is high. According to the analysis by annual salary (less than 1.3 million yen as standard), the level of dissatisfaction of those who earn 4 to 5 million yen is high. Those whose annual salary coefficient is at a 4-million level may be more nervous about appraisal results, considering greater impact on their household budgets including the education of their children, or it may be that the coefficient is a surrogate variable for other variables.

Concerning the bases of appraisal that those who return to workplaces consider desirable to be used in the first appraisal after their return, only 10.1% of them vote for “results during the period including child care leave,” 39.7% for “the period after return and excluding child care leave,” and 31.9% for “capabilities at the present time” but 9.3% for “appraisal results just before child care leave.”

As a result of checking to what extent managers’ actual appraisal method is coincident with takers’ desirable method, the coincident ratio proves to be as low as a little less than one-third.

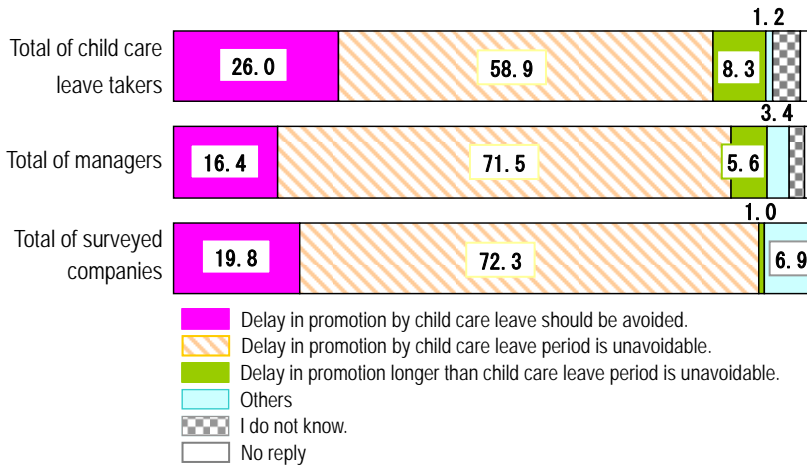
## **(6) Effect on Promotion**

Companies’ views concerning the effect of child care leave on takers’ promotion is that: as many as a little more than 72.3% of companies consider that “delay in promotion by child care leave period is unavoidable” and 19.8% of companies consider that “delay in promotion should be avoided.” Meanwhile, managers’ views are a little more severe than the companies’ human resources departments’ views as a whole (Figure 2). The results show that 5.6% of managers consider that “delay in promotion longer than child care leave period is unavoidable.”

As for takers’ view, the number of takers who consider that “delay in promotion by child care leave should be avoided” is larger than the numbers of companies and managers who consider so. The former number represents 26.0%, around one-fourth. Approximately 60% of takers reply “delay in promotion by child care leave period is unavoidable,” as well as 8.3% of them consider that even longer delay is unavoidable.

Concerning the effect of short-time work on promotion, nearly 40% of

**Figure 2. Ideas on promotion associated with child care leave**



companies think “delay in promotion should be avoided,” and half of the companies think that “delay in promotion by child care leave period is unavoidable.” In the case of managers, the situation is almost the same as that of companies. Approximately half of managers think “delay in promotion by child care leave period is unavoidable,” and 35% of them think that “delay in promotion should be avoided.”

In the meantime, how is the view of child care leave takers? I will analyze the responses from 284 employees who returned to their workplace as short-time workers after child care leave. They include two male employees. The number of employees who reply “delay in promotion should be avoided” is larger than those of companies and managers, accounting for 40%. However, a slightly larger number of employees reply “delay in promotion by the period of reduction in working hours is unavoidable,” accounting for 47%. This trend of replies remains the same when you check their replies by the period worked as a short-time worker and difference between the contents or volumes of jobs assigned before and after their return to workplaces.

General Union members were given a question, “if in your workplace” there was a child care leave taker or a short-time worker, it would affect his/her promotion or not. Since the question does not ask for replies, separating the case of child care leave from the case of short-time work, you cannot compare it with Figure 2 directly.

According to their replies, the members who reply “delay in promotion should be avoided” have a share of 43.3%, while those who reply “delay in promotion by child care leave period or accumulated short-time working time is unavoidable” have a share of 46.2%, almost the same percentage. According to the analysis by gender and single/married, the single female members who reply “delay in promotion should be avoided” make up a small share of 33.3%, but the single male members who reply so make up a relatively greater percentage. The former trend is almost applicable to married members and even to female married members.

According to the analysis by experience of Union executive, many of the members who have experience of being an Union executive reply “delay in promotion should be avoided,” but the percentage is almost the same, namely 50 to 50. The largest number of those who are presently Union executive officers reply “delay in promotion should be avoided,” but the percentage is still 45.5% only. This percentage is almost the same as that of those who are presently Union executive officers who reply “delay in promotion by child care leave period or accumulated short-time working time is unavoidable.”

### **3. Summary of Union Data Analysis**

- (a) There are large differences in companies’ policies and managers’ actions regarding personnel appraisals of child care leave takers and child care short-time workers.
- (b) There are also large differences in companies’ and managers’ replies regarding guidance and information provision concerning personnel appraisal.
- (c) There are no significant differences in personnel appraisal results between those who return to workplaces as short-time workers and those who return to workplaces as full-time workers. Those who are given higher scores are more satisfied with appraisal results, but it does not mean that those who are given scores higher than average are very satisfied with the appraisal results.
- (d) When the effect of a short-time worker on the workplace is positive, his/her appraisal score becomes higher. Especially, when staff members become conscious about the time of closing meetings or there is a review of job allocation and way of proceeding with jobs, managers mark high scores. On the contrary, when there are “problems related to dealing with

customers” or “other colleagues having to bear additional operational burden,” managers mark low scores.

- (e) Those who return to workplaces after taking child care leave and are satisfied with first personnel appraisal results are a little more than those who return to workplaces after taking child care leave and are not satisfied with first personnel appraisal results. Their work styles after their return have no relation to such satisfaction levels.
- (f) Concerning the effect of child care leave on promotion, many companies and managers consider that “delay in promotion by child care leave period is unavoidable;” and many child care leave takers consider that “delay in promotion should be avoided.” However, a certain number of both companies and managers consider that “delay in promotion should be avoided,” while a certain percent of child care leave takers also consider that “delay in promotion is unavoidable.”
- (g) Regardless of gender and single/married, the number of general Union members who think that “delay in promotion should be avoided” is almost equal to that of those who think that “delay in promotion by child care leave period is unavoidable.”

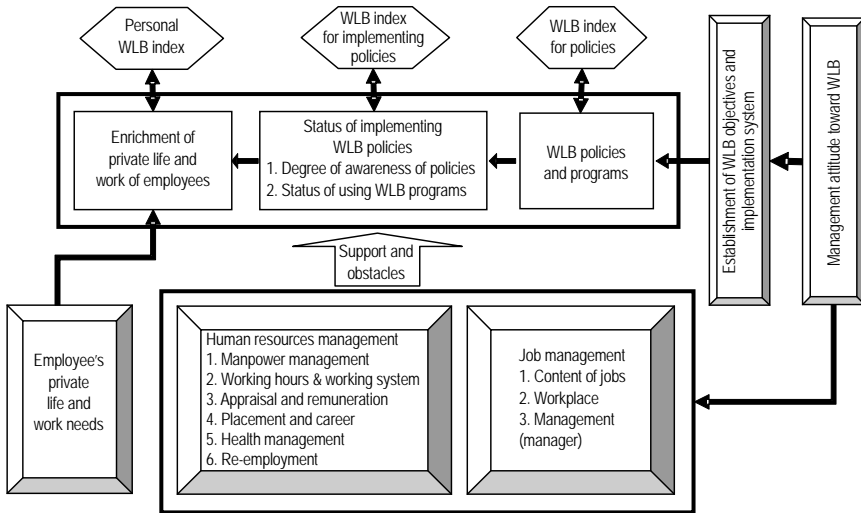
#### **IV. Development of WLB Indices**

WLB indices were jointly developed in 2007 by a voluntary company group (work-life balance association) and Gakushuin University Research Institute of Economics and Management (GEM). It is called WLB-JUKU INDEX. These organizations have referred to our earlier studies for developing the indices.

The reason why it is important to develop indices for family friendliness and WLB is that these matters are of nature that it is not easy for any government, labor union or company management to oppose. They all tend to agree with the plan in general but not to compromise on details. However, with indices developed, you will be able to discuss matters objectively, specifically and constructively, based on the results derived from the indices.

In order to construct policies and programs adequate to implement WLB, it is important to proceed with such construction based on “hypothesis and test.” In this case, it is indispensable to accurately assess in what situation company’s own WLB is as a result of introduction of the policies and programs, namely

**Figure 3. Framework of analysis by WLB indices**



“the actual status of WLB.”

It is “WLB-JUKU INDEX” that has been developed on the basis of such concept as the indices that are used by companies to voluntarily assess the current status of how WLB is promoted. The indices have been made under the framework of Figure 3. The WLB indices are based on the company survey and employee survey. An important point is that data is designed as matching data. We have developed indices for approximately 200 items, and have confirmed the effectiveness of the indices when conducting surveys on 9 voluntary companies and 2,871 employees of the companies.

The following is a summary concerning the effectiveness of the indices:

- (i) A newly developed “WLB index for implementing policies” and “personal WLB index” can be used as indices that allow for assessing the process of implementing WLB policies and programs.
- (ii) The strength and weakness of companies can be assessed systematically from the WLB point of view by using the “WLB index for policies,” “WLB index for implementing policies” and “Personal WLB index” as benchmark indices.
- (iii) The developed indices covering the entire WLB implementation process make it possible to analyze relationship among the development and

application of policies and programs, the awareness of all employees on such policies and programs, employee WLB improvement and its effect on company performance, to assess the policies and programs from viewpoints of employee WLB and company performance, and to identify the direction for further improvement.

WLB is a very important theme to consider a desirable relationship between a company and its employees as well as the method of managing human resources in the future. I hope that the WLB-JUKU INDEX will be utilized by many companies and contribute to the advancement of WLB.

## **V. Summary**

This paper shows that family friendliness combined with equal opportunity has resulted in good effects, including improvement in financial performance, and that the relationship of the so-called “win-win” will probably be seen in Japan as well.

In addition, various perception gaps have been found among companies (persons responsible for human resources management), managers and staff members. Such gaps are bigger than expected especially in terms of the awareness of policies and programs, appraisal method and the ideas on promotion associated with child care leave. This suggests that forcing companies to introduce WLB policies and programs by law will not help to solve the issues at all.

The companies of which survey data are used in this paper are considered relatively ahead of average companies throughout Japan in respect of family friendliness and WLB. Even in the former companies, there exist such big gaps. It is, therefore, necessary to promote family friendliness and equal opportunity based on the assumption that these gaps do exist.

What I have mentioned above is confirmed with matching data. I expect that this kind of research and study will be conducted on a continuous basis in the future.

These discovered facts will encourage people to review company theories that are a base for discussion of various matters. The method of analyzing behaviors taken by companies before and after legislation and the method of comparing companies in respect of introduction of a specific program are



based on the model in which relevant persons in the company act in accordance with the instructions of their top management. These methods, therefore, are the orthodox economic models that consider companies as a “black box” and were effective until certain years ago. Thereafter, “organizational economics” and “the science of business management based on economics” developed but probably not to the extent that these can theoretically explain what has been discussed here. What seems important is not to criticize company behaviors directly but to refine company theories from any various fields, including social science, economics and business management.

Lastly, I would like to refer to the points for implementing and promoting family friendliness. It is important to discuss the matter at workplaces, using the “discussion bases” such as labor unions, labor-management meetings and similar other meetings, not only to introduce the programs but also to let all related people know and understand the matter. Specific discussion materials (themes and points) are in such WLB indices as briefly introduced in Section IV. First know where weak points are in a relevant workplace and let managers and workers, who know the workplace very well, discuss and determine how to overcome the weak points.

The above procedure has been daily put into practice in most companies in Japan. Discussions are being held presently in these companies about how to allocate or relocate human resources, materials and money on the basis of the results of survey on market environment changes, aiming to provide customers with planned products at planned costs.

This procedure is also applicable to the fields of “family friendliness” and WLB. For example, if an employee wishes (or is supposed to wish) to take a child care leave, what should be done is just to try to obtain agreement on the method of reviewing job assignments and the salary and promotion of the taker. If this was merely an unreturned company cost that results in no profits, only a few people would be serious about discussing the matter. However, since the “win-win” relationship, which leads to company profits, is made clear, the effort will never be fruitless but will certainly result in company development.

## **Appendix: Indices of Equal Opportunity and Family Friendliness in JILPT Survey**

### **❖ Equal Opportunity Index**

#### Attitude and policies

- Four items for management policies announced by top management concerning human resources management of regular employees
- Ten items for efforts related to affirmative actions

#### Actual status

- Ten items on employment of female regular employees
- Regarding regular employees who have worked for the company for about 10 years, difference between male and female employees in the ratio of the number of male/female employees who had to change their residence due to a job transfer to the total number of the male/female regular employees.
- Difference between male and female employees in the ratio of the number of newly recruited male/female regular employees who work in their companies until their early 30s to the total number of the newly recruited male/female regular employees.
- Female employees ratio: the number of female employees ÷ total number of male and female employees
- Difference in average age between male and female employees
- Difference in job tenure between male and female employees

### **❖ Family Friendliness Indices**

#### Efforts and policies

- Five items for management policies announced by top management concerning human resources management of regular employees
- Programs to encourage male employees to take child care leave

#### Programs

- Availability of child care leave programs, year of introduction of child care leave programs and details of current child care leave programs
- Twelve support programs (including practices) related to child birth and child care

#### Actual status

- Status of continuous service of female workers
- Twelve support programs (including practices) related to child birth and

child care (results of utilization of the programs during the past three years)

Note: The above indices are based on the scoring in which equal opportunity and family friendliness are given 105 points (50 for efforts + 55 for actual status) and 89 points (30 for efforts + 30 for programs + 29 for actual status), respectively. The number of samples is 715.

Additionally, I have tried to make indices for the following items to which replies decrease in number (the number of samples: 376). Shown below are items with large samples:

### **Additional Items**

#### **❖ Equal Opportunity Index**

- Difference in initial annual average income between male and female employees
- Difference in annual average income at age 35 between male and female employees
- $(\text{The number of female assistant managers} \div \text{the number of male assistant managers}) / (\text{The number of female employees} \div \text{the number of male employees})$
- $(\text{The number of female managers} \div \text{the number of male managers}) / (\text{The number of female employees} \div \text{the number of male employees})$
- $(\text{The number of female general managers} \div \text{the number of male general managers}) / (\text{The number of female employees} \div \text{the number of male employees})$
- Ratio of newly recruited female graduates to total of newly recruited graduates
- Ratio of female workers recruited in mid-career to total of workers recruited in mid-career

#### **❖ Family Friendliness Index**

- The number of female employees who delivered a child during the past three years
- $\text{The number of female employees who took a child care leave during the past three years} \div \text{the number of female employees}$
- The number of male employees who took a child care leave during the past

three years ÷ the number of male employees

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