



“Improving work-life balance: opportunities and risks coming from digitalization”

Guidelines for a checklist of DOs and DON'Ts

With the support of the European Union

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Table of contents

1. Introduction	3
2. Guidelines	4
Guideline 1: Trust and effective social dialogue	4
Guideline 2: Gender equality	6
Guideline 3: Healthy and Safe working environment	7
Guideline 4: Data and privacy protection	8
Guideline 5: Training	9
Guideline 6: Work organisation	10
Guideline 7: Performance management	11
3. Follow-up	12

1. Introduction

In the context of the EU Social Dialogue Committee for Central Government Administrations, SDC CGA, the employers, EUPAE, and the trade unions, TUNED, have jointly agreed these Guidelines with a view to improve work/life balance by better identifying risks and opportunities stemming from digitalisation.

These guidelines are a first joint attempt by EUPAE and TUNED, social partners representing a large majority of managers and employees in central or federal governments in the EU, to tackle the specific link between digitalisation and work/life balance which is subject to many occupational, HRM as well as sociological questions. They do not respond to all the open issues of digitalisation and constantly evolving new technologies not the least artificial intelligence and increased use of algorithms. Further discussions will continue in the context of the EU SDC CGA with the support of the European Commission.

It is also underlined that digitalisation is not a substitute to work/life balance policy measures such as parental or care leave for dependents and quality, affordable child and eldercare infrastructures .

The guidelines are addressed to managers as well as trade union representatives to feed into ongoing or future sectoral social dialogue in EU Member states.

They are based on a Field Study carried out in the course of the project in 2019, containing many examples from Member States, discussions in two Focus Groups and a final conference consisting of trade union and management representatives and presentations from several experts (ILO, OECD), officials of national governments and the European Commission, and relevant literature.

There are undoubtedly many positive aspects of the spread of new communication technologies in both the working environment and private life, like opportunities for more autonomy and flexibility for employees in their work. There are also, however downsides, a central risk is the gradual blurring of frontiers between work and private life (reading and replying to emails at the weekend, surfing on internet in the evening, etc.). This can potentially alter the balance between working life and family life or even health. The field study revealed a paucity of data on this subject. Yet that an impact exists seems certain not the least on working time and measurement of workload.

2. Guidelines

Guideline 1: Trust and effective social dialogue

Digitalization should be guided to maximize opportunities and minimize the risks arising in order to ensure that private and professional life can indeed be well-balanced. A regulatory framework is indispensable including EU minimum standards on information and consultation rights of employees and their representatives as agreed by the SDC CGA in 2015.

Social partners are in a unique position to observe and identify the different issues and find possible solutions as they emerge in that field. Measures to manage the negative impact of the digitalization processes on the work/life balance of employees should therefore be jointly addressed by public employers and workers' trade union representatives through collective bargaining or other forms of social dialogue in line with the relevant legal framework.

On-going consultation and communication between employers, workers and their representatives is a key success factor.

While there is no legal framework at EU level that addresses the topic of these guidelines, there are however a number of EU directives that lay down relevant legal provisions such as on work-life balance, both in terms of leave and flexibility, gender equality including equal pay, health and safety of workers, working time, GDPR, all of which are subject to extensive social dialogue. Also relevant is the European social partners' framework agreement on telework of 2002¹. The most relevant policies and legislation are listed in the Field Study. All new forms of working that are facilitated by communication technologies must comply with the EU fundamental principle of equal treatment between workers.

¹ Text of the Agreement is available here:
<http://resourcecentre.etuc.org/Agreements-57.html>

The following actions need to be considered:

- Defining and clarifying terminology² for your organisation, sector or country, to make sure that they are clear for and shared by everyone (e.g. tele-working, agile working, smart working, remote working).
- Guaranteeing that all workers benefit from the same rights and comply with the same obligations as comparable workers at the employer's places of work.
- Defining the objectives for the organisation, employees and users, explaining the opportunities and risks, which problems are trying to be solved or which improvements are sought, how the benefits will be shared equally among the workforce.
- Identifying gaps and solutions, preparing for collective bargaining or other forms of social dialogue (e.g. work-life spillover, burnout prevention), anticipating and reducing negative impact on certain staff grades, gender, and specific groups of the workforce and making sure it will not harm and indeed will promote an inclusive, collective ethos.
- Ensuring shared, objective evaluation of the digitalisation processes and how it will improve work-life balance and productivity.
- Safeguarding existing work-life balance measures and collective agreements or other forms of social dialogue in case of restructuring.
- Ensuring that technologies enable workers with disabilities or chronic illnesses to continue working (e.g working from home).

DOs	DON'Ts
Ensure that digitalisation is part of an effective social dialogue	Assume that digitalisation is simply about technical device and software
Envisage starting with a pilot project for both digitalisation and work-life balance initiatives to test and fine-tune based on continued employee and manager feedback	Limit pilot projects to staff who are most interested by the new form of working and design policies that are too rigid and require a lot of complicated administrative procedures to change or adapt
Set specific objectives and build a fair work climate regarding communication, consensus and trust between the actors involved.	Not sufficiently funding the initiatives, including training of staff, for IT systems, relevant devices, and consequent continuous support.

² A number of definitions are offered in the Field Study

Guideline 2: Gender equality

Digitalisation should be framed as an opportunity to enhance work-life balance of both women and men whose needs will differ throughout their life depending on several factors, such as their care responsibilities, economic situation, career or educational changes. Therefore, both digitalisation and work-life balance measures have to be gender-sensitive and equality proofed allowing for positive actions so that employers are aware of the options digitalisation can offer to advance gender equality at the workplace both in terms of pay and new job opportunities. As with other HR issues, the earlier the gender equality aspects of a digitalisation process are considered, the better and more effective the responses can be.

The following actions need to be considered :

- Developing a Gender Action Plan with specific targets and yearly actions to close the gender and possibly grade gap in employees benefiting from the opportunities of digitalisation.
- Encouraging equal take up of possibilities for flexible working patterns by men and women in order to tackle the unequal distribution of care duties between women and men.
- Involving Equality Officers in the design and implementation of digitalisation processes.

DOs	DON'Ts
Implement initiatives that have specific gender equality objectives exploiting the potential of digitalization and work-life balance.	Just mitigate the potentially harmful impact of policies on women.
Collect and monitor gender-segregated data to evaluate the implementation of digitalisation related initiatives, such as telework or mobile work, and verify if and how the work-life balance measures are useful to support women. As a consequence, identify relevant and appropriate interventions.	Use only generalised workforce data without insight into gender and grade differences.
With regard to telework, make sure it remains a voluntary, non-discriminatory option open to all workers regardless of grade, gender and other equality grounds.	With regard to teleworking from home assume that women will be more interested than men.

Guideline 3: Healthy and Safe working environment

The frequency and rapidity of change, blurring of private and working life and virtualisation of human relations in the workplace and confusion over what is important and urgent to deal with are potential triggers of high stress levels, burn-out or FOMO (Fear of Missing Out), a form of social anxiety leading to an obsessional relationship with professional communication tools.

A healthy working environment, preserves workers' health, good work organisation and working conditions and a meaningful job content ,are essential to ensure sustainable employment and a quality administration to citizens. In a digitalised world, if there is an agreed workplace outside of the employer's premises, the employer remains responsible for maintaining good physical and mental health of employees, a responsibility which should not be outsourced to the latter. A healthy workplace can help save costs by preventing absenteeism, ensuring good performance and increasing retention and attractiveness.

The following actions need to be considered:

- Making health and safety data constantly available also for the purpose of relevant policies updating, respecting privacy obligations, also with a view to feed into the social dialogue.
- Making sure that digitalisation and work/life balance are regular items in the health and safety staff committees.
- Reviewing responsibilities allocation and workload across individual members of staff and teams/units as well as staffing needs on a regular basis.
- Designating a person of trust inside each department to support colleagues and detect early signs of psychosocial risks.
- Provide information and clarify rights and obligations for employees regarding work activities outside the office, including those related to equipment, ergonomics, internet connection and compliance verification, in line with collective agreements and regulations at national and European levels.
- Examining the legal framework to identify whether there is a “right to disconnect” legislation in place, in addition to the legal provisions of the

Working time directive that provides for daily rests (11hours) and breaks, and ensuring that there is a place for collective bargaining or other forms of social dialogue.

DOs	DON'Ts
Conduct regularly psycho-social risk assessments or at least make sure that psycho-social risks are part of the obligation to carry out regular health risk assessments.	Underestimate the potential risks linked to digitalization and new ways of working on employees' well-being.
Make sure that verification mechanisms are in place so that the applicable health and safety provisions are correctly complied with the EU social partners agreement on teleworking.	Assume that workers will know and use the best IT equipment in his/her interest or of the administration.
Implement on-going communication campaigns on work related stress and the risks and signs of burnout as a preventive measure.	Just address issues like burnout and chronic stress when they are already manifesting in the workforce. Underestimate the collective impact of individual burnouts
Enhance cooperation between HR professionals, occupational health and safety experts and bipartite committees, employee representatives, unions, to manage preventive workplace campaigns. Raising awareness about the potentially harmful effect of digital technologies and overwork. Support employees in recognizing early warning signs of stress that could lead to burnout.	Assume that the workplace is risk free.
Be particularly vigilant about the risk of isolation of flexible workers by maintaining intensive communication with and between on-site and off-site staff, and limiting if necessary the number of telework days in the interest of employees.	Assume that well-equipped flexible workers necessarily have the same degree of communication with the workplace as teams on-site.

Guideline 4: Data and privacy protection

All that is digital generates data. Employees using digital tools inadvertently leave a data trail behind them. Additionally, central government administrations gather and

work with large amounts of sensitive data, which are sometimes dealt with by digital tools or externalized. Clear rules, easily available, must be in place regarding both the rights and obligations of employees and employers regarding the use of work-related equipment.

The following actions need to be considered:

- Collecting, monitoring only relevant data about employee output, in order to facilitate performance management, and with the full knowledge and consent of the employees and their representatives.
- Differentiating between useful data, that does not invade the privacy of employees, and unhelpful or sensitive data, or data that can invade the privacy of employees at work needs to be isolated and deleted.
- Promoting trust in employees in a context of management by objectives rather than surveillance software which can often be not only ineffective but also costly and counterproductive.

DOs	DON'Ts
Ensure that information on what data is being collected and how it is being used is well communicated to employees.	Assume that employees know about the type of data that is being collected.
Regularly revisit data collection, and select what is necessary to the operations, and what isn't, and check compatibility with GDPR ³ regulations.	Collect data for the sake of it without utility to the organisation, its mission and employees.
Train employees on how to handle data and the proper use of digital tools to protect sensitive information.	Neglect regular training duties on data protection.

Guideline 5: Training

Lifelong learning is essential, and even more so when it comes to digitalisation related aspects, also considering that the skills become obsolete quickly. There is also a risk that algorithms, artificial intelligence lead to a deskilling of employees or make their job less rewarding and interesting. Employees, regardless of their position within the organisation, their grades, pay, employment status, their seniority,

³ https://www.epsu.org/sites/default/files/article/files/GDPR_FINAL_EPSU.pdf

their gender or age or ethnic background or whether they suffer from a chronic illness or impairment, they should have access to free of charge, relevant training, and during working hours.

The following actions need to be considered:

- Earmarking a budget for training and upskilling for all workers taking into account the continuous evolution of digital technologies.
- Offering training that not only focuses on technical but also on soft skills and building confidence in workers and management in using the new technologies .
- Adding work-life balance specific topics to the training offer (i.e. time-management, tele-working, limits between personal life and work, boundary management, resilience, prioritisation...etc), identifying earliest symptoms of digital stress.

DOs	DON'Ts
Regularly assess learning needs without prejudice for or negative career consequences.	Assume you know what your employees need in terms of training and information, especially older ones
Plan in enough time for consultations, regular training and information sessions for employees to be able to give feedback and integrate the right information.	Cut down on time and financial resources to be spent on training and communication.
Provide tailored training for different categories of employees and managers who may need different types of support.	Provide training limited to specific topics (i.e. telework, health and safety, time management, resilience, etc.) without considering the whole picture.

Guideline 6: Work organisation

Digital tools that make working time and place flexibility possible also may contribute to an extension of the working day and result in increased work-life conflict. It is up to the employer, in due respect of and compliance with the relevant collective agreements or other forms of social dialogue and labour law, to set boundaries between work and non-work, to avoid carrying work over into the time that is for rest

and recuperation. Establishing a climate of trust within the organisation is of vital importance to achieve this.

The following actions need to be considered:

- Managing the potential work overload that may be created by digitalisation and the increased speed of work, by distributing work fairly among the team members, as well as building in contingencies and extra resources as needed.
- Foster new ways of work, between employers and employees, based on work objectives, cooperation and teamwork.

While employees desire more autonomy, measures should be taken to avoid overtime work and where needed make sure it is compensated, and guarantee their rest and recovery.

DOs	DON'Ts
Set reasonable workloads, and distribute tasks in a balanced manner.	Leave excessive workloads not tackled.
Be aware that digitalisation processes can create information, work and social overload.	Neglect the pile-on effect of work, especially aided by digital tools.

Guideline 7: Performance management

Transparency in communicating performance standards is essential in building trust and confidence in employees and also line-managers, when venturing into alternative work arrangements (e.g. working from home). While enabling employees a better reconciliation of work and family responsibilities, responding to the needs of the organisation must be ensured. Any performance management effort should focus on both the individual and the team.

The following actions need to be considered:

- Ensuring that performance evaluation criteria are transparent, agreed with the employee(s) concerned and based on previously set procedures.

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- Regularly conducting employee surveys to monitor the effect of digitalisation on performance, workload and working conditions.

DOs	DON'Ts
Review and put in place individual work plans with achievable objectives measured against targets. Think about team level targets as well.	Irrational deployment of personnel (excessive employees in one working area, insufficient employees in another).
Tie work-life balance options to performance management, always assess requests for flexible or teleworking through the performance of the individual and the team.	Use teleworking or flexible working options as a tool to reward or punish an employee.

3. Follow-up

EUPAE and TUNED consider the issue of digitalisation and its impact on the work-life balance of central government administration employees of great importance and committed to continue working on it to maximise the potential and reduce the potential risks linked to it.

EUPAE and TUNED firmly believe that these Guidelines can support employers, trade union representatives and other stakeholders in general in responding to these latest developments linked to digitalisation. They will develop monitoring mechanisms on how these guidelines will be used and proved to be useful for social partners at national level.

Monitoring mechanisms concerning the present Guidelines will be discussed within the context of the Social Dialogue Committee for Central Government Administrations.