# The impact on gender equity of policies concerning intergenerational obligations

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## *Premise*

Attention for the way policies promote, or hinder, gender equity is not new. Actually it has been one of the main contributions of feminist research to welfare state analysis. Most studies, however, have considered only a small set of policies, and sometime only one (e.g. the recent study by Ray et al. 2010 on parental leaves), rather than looking at the interaction between different policies intervening on the same sphere – e.g. child care with leave options. Even rarer are studies that look at policies intervening on different dimensions of gender arrangements: childcare, fiscal policies, long term care, pension policies and so forth. As a consequence, the policy-structured framework of gender relations is fragmented. Using an intergenerational responsibilities perspective, and looking both at financial and at care responsibilities, it is possible to at least partly re-construct the complex policy puzzle in which men and women having (or having had in the past) responsibilities for children and/or frail parents deal with in developing their life course strategies, as individuals and as couples.
We are, of course, aware that gender equity derives from an evaluation of the fairness of a society's gender system from the perspective of social, political, economic, reproductive, mobility, personal integrity rights. It spans, therefore, a wide range of sectors and dimensions and it cannot be reduced to equity in the gender division of paid and unpaid labour, not even if one limits the focus to the family sphere (Orloff 2009a, McDonald 2009). Furthermore, lack of equity in one sphere may reduce de facto the existing in principle equity in another. The case of limited reproductive rights, or of violence against women is the most explicit example of these possibly unbalancing effects (O'Connor et al, 1999, Orloff 2009a). McDonald (2000) has shown, for instance, the existence of a strong relationship between incoherence between different institutional settings with regard to gender equity and fertility levels in the OECD countries, suggesting that where incoherence is greater, women find it more difficult not to have to choose between motherhood and other activities, in particular participation to paid work.
Policies are an important part of the overall gender equity (or inequity) system, but only a part. Even limited to the impact of gender equity in the division of paid and unpaid work, policies must interact with other powerful institutional and cultural frameworks, and particularly with the labour market on the one hand, with family and gender cultures on the other hand. The relationship between these three settings is neither one of pure causality nor one of pure autonomy. Women may enter and remain in the labour market in comparatively high numbers in the Scandinavian countries, with their generous and tendentially gender equalizing policies, but also in Portugal, notwithstanding much less generous supporting policies and with a more traditional gender culture, but with the presence of a relatively extended family support (Lewis et al 2008, Crompton and Lyonette 2007).
Last but not least, policies may affect differently women and men in different social classes, from the point of view of coverage, cost, impact, and so forth. Flat rate benefits, for instance, affect more negatively higher income workers, while earnings related may benefit them, similarly to tax deductions. Unpaid leaves may be more accessible to a parent in a higher income (although the income loss is greater in absolute terms) than to one in a low income household. These differential effects by social class may result also on differences in the gender specific impact of a given policy.
An additional issue concerns the fact that in considering intergenerational responsibilities, policies involve the options not only of men and women as fathers and mothers, or as sons and daughters. They involve also the options and the welfare of the family members they are

responsible for, in particular young children and frail older people. Thus, when assessing issues of gender equity, as well as of degrees of defamilization in the care relationship one should be aware that a third actor is involved as well (see also Leitner and Lessenich 2007): not only fathers and mothers, husbands and wives, daughters and sons, but also children or frail parents.
In our analysis of the degree to which policies addressing intergenerational responsibilities support gender specificity in roles are neutral or actively incentive a rebalancing of gender roles we will not be able to fully address this complexity. Our focus will remain on the characteristics of policies. Yet, we will point out specific junctures where policies may have a different impact depending on the circumstances, or where policies may present different trade-offs depending the perspective one takes.

## *Our theoretical framework and research questions*

It has been argued (see e.g. Gornick and Meyers 2009) that the dual earners/dual carers model solves the tension between employment focused and care focused demands concerning both gender equity and women's financial autonomy. In this perspective, policies should a) support women's labour force participation by partly relieving them from family-linked caring responsibilities, b) acknowledge the value of care work, both allowing time to care and financially compensating it; c) support/incentive men in sharing caring responsibilities.
Two main limitations of the dual earner/dual carer model are of course apparent; in addition to that it is not necessarily everybody's model (e.g. Orloff 2009b, Hassim 2009, Lewis et al. 2008). First, it presupposes that there are good jobs for all, making it worthwhile to work. Second, it is based on the presumption that there is always a couple, sharing the dual responsibilities of earning and caring. While social policies may not address the issue of good jobs, they may not ignore the fact that many individuals who have earning and caring duties shoulder them alone, or at least not within a couple's relationship, as the increasing number of lone parent (mostly lone mother) households testify. In a gender equity perspective, therefore, policies should be evaluated not only on the basis of whether they encourage sharing within a couple, and to what degree, but also on whether they allow individuals – to use Hobson's (1994, see also Orloff 1993) formulation – to set up their own household without being dependent on a partner, as well as, following O'Connor et al. (1999), without being totally dependent on the state. Policies, therefore, must be assessed from this dual perspective: that of couple-sharing in earning and caring and that of the un-partnered individual to be able to earn and care.
Using the standard vocabulary of welfare state studies, four dimensions of policies are particularly relevant:

a) the degree to which policies allow women with family responsibilities to stay and remain in the labour market, thus being independent from another person's income, notwithstanding their caring responsibilities, i.e. to be both "commodified" and "de-familialized" in their ability to provide for themselves, e.g through the provision of services, leaves, flexible working time, antidiscriminatory regulations and so forth;

b) the degree to which policies acknowledge caring for dependent family members (children, dependent adults, frail elderly relatives) as an activity giving entitlement to financial support in its own right, e.g. through contributions towards the old age pension, or through income support while performing care irrespective of the employment status (Hobson 1994);

c) the degree to which policies support the taking up of caring responsibilities – i.e. supported familisation (Leitner 2003, Saraceno 2010, Saraceno and Keck 2010) – for both women and men (O'Brien 2009, Ray et al 2010), e.g. whether fathers are entiled to parental leave, whether there is a reserved quota for them and so forth;

d) the degree to which caring needs are de-familialised through de-commodification, that is through public (or supported though public financing) provision (Saraceno and Keck 2010), given coverage patterns, cost of services, opening hours and so forth.

Crucial are in particular the specific patterns (length, generosity, gender specificity) of supported familisation and the intertwining of de-familisation and de-commodification, as they have been conceptualized by Esping Andersen (1990 and 1999), Orloff (1993), Saraceno (1997, 2000 and 2010) and Leitner (2003). De-familisation, in fact, may also occur through recourse to the market. But this means that options are heavily skewed by social inequalities in financial means as well by inequalities in negotiating power between men and women in families and between individuals and their reference groups.
The first dimension is not simply the combination of the other three. It includes also working time policies, family friendly enterprise policies and so forth. As den Dulk (2001, see also den Dulk 1999) has shown, the latter are particularly important in countries where public policies are less developed. In these contexts, characterized by what we might call a commodification of social policies, the options available to (female and male) workers may differ to a much higher degree than in those with more generous and universal public policies: not only on the basis of social class but on the basis of the kind of enterprise they work for and under what kind of contract (e.g. long term/short term). At the same time, company policies may address work-family conciliation issues for both women and men with a wider perspective than those present in most public policies. For instance, even the most generous leaves do not go beyond the first few years of life of a child and rarely address the need to care for a family member who is not a small child. Company policies or collective agreements, instead, might offer a more diversified package, concerning not only leave time, but also working time (on "best practice" examples of company policies see e.g. den Dulk 2001, den Dulk 1999).
Within the limits of this paper, however, we can address the first dimension only from the perspective of its being partly the result of public policies concerning family responsibilities. We can address neither the role of other public policies such as the anti-discrimination and positive action ones, nor that of private, company driven, policies. But, as in the case of familialism by default (Saraceno 2010), which indicates the space/responsibilities left totally to families, to their gender and kin arrangements, to their time and financial resources (including the resources to recourse to the market), we might speak of a "company welfare" by default, indicating what is left to the discretion of companies and to the negotiating power (and willingness) of trade unions.
Since intergenerational obligations and their gendered framework are bi-directional and appear at different points over the life course, in our analysis, we do not focus only on policies concerning the presence of young children, thus on leaves and childcare services. We look also at policies addressing the financial and (non health) caring needs of the old, although information on these is more fragmentary and less updated than that available for policies concerning the presence of children. Furthermore, differently from most recent exercises that have focused on parental leaves as the key policy for assessing the degree of gender egalitarianism (or gender equity) of parental policies (e.g. O'Brien 2009, Ray et al. 2010), we focus not only on single policies, but also on their interaction, or combination. Leave length, in fact, must be assessed not only in itself, but also in reference to the non

family care available. In our view, this is more important, and to a certain degree less discretionary, than developing a sophisticated metric for assessing generosity and gender equity of a single measure taken in isolation.

## *Methods and data*

We have collected data for all EU countries and Norway on a variety of policy measures that document the three policy dimensions (de-familisation, de-commodification, supported familisation) and their interaction which above we have argued are relevant for assessing the gender equity impact of policies dealing with intergenerational responsibilities. Building on previous work (Saraceno and Keck 2010), we first look at how policies attribute caring responsibilities and income security to the family and/or to the state. We then look at whether patterns of public support (or lack of support) to intergenerational responsibilities contribute to crystallize or on the contrary to redefine the gender division of labour and responsibilities. For reasons of parsimony, in the analysis we concentrate only on a selection of policies. Particularly, in the case of caring responsibilities towards children, we focus on pre-school age children, since this is the age range where cross country difference are largest and decisions taken by parent may have long lasting effects in later life. Unfortunately, in other crucial areas there is a serious lack of good comparative data on all EU countries. It is the case, among others, of measures for lone mothers asking for social assistance, flexibility and cost of child care services, or of hours of caring services provided for the frail old.

We focus on policy output that is on entitlements to and patterns of public support. Therefore we assess the "theoretical", not the actual, impact on gender equity. In order to look at the actual impact we should look at outcomes. But these are not only the result of policies, rather also of the interplay between policies, social norms, social and individual values, labour market conditions, general patterns of social inequality. In order to assess the specific impact of policies on outcomes, in depth case studies, necessarily on a smaller number of countries, are needed. We think, however, that it is theoretically and cognitively relevant also to assess what would be the gender impact of the different policy frameworks net of other influences.

We have several indicators of de-commodification *via* supported familisation and of its gender specificity: length and compensation of parental leaves and the way their usage by either parent is regulated; payments for care which may be used by family carers either because of absence of regulation or because the regulation specifically provides that a family carer may receive some payment without being formally hired, leaves for workers with caring responsibilities towards a non child family member, contributions towards the old age pension referred to caring periods, child allowances and tax benefits which support the cost of children and, depending on their design, may or not disincentive a second earner, forms of taxation which benefit financially asymmetrical married couples, and survivor pensions. This last measure is particular important for women, particularly in the older cohorts, since they are less likely than men to have access to a work-linked old age pension.

For the de-familisation of caring needs we have the following: coverage rates by publicly financed childcare services (focusing on children under three); coverage rates by publicly financed home and institutional care services for the frail old.

In order to take account of the fact that in many cases there is not a cohabiting parental couple and often not even a co-responsible one, we have also looked at recent trends in policies towards lone mothers in situation of financial difficulty. As it is well known, in fact, in recent years countries, which had a tradition of treating women in this situation mainly as mothers with caring duties (thus supporting them as such), have shifted to treating them as mothers with breadwinning duties, thus strongly incentivizing their commodification (see e.g. Sewick 2005), addressing more or less successfully the caring needs of children thus left uncovered. Lack of information on many countries, however, does not allow to systematically integrating this dimension in our comparative exercise.

The synthesis we provide is descriptive not analytical, because we cannot solve in a satisfactory way the two fundamental problems in defining country clusters empirically, that is, making different scales of policy measurement comparable and defining weights on the importance of a policy measure against all others. The proposals we find in the literature are not fully persuasive, since they are based on somewhat arbitrary decisions in allocating weights, constructing indices, and defining threshold to group countries (see also e.g. Scruggs and Allan 2008). Furthermore, they are limited to one or two policies at the time, while we have a complex range of policies, as well as of countries. We prefer, therefore, to limit ourselves to clarify conceptually the gender dimension of the policies we analyse and to detect empirically commonalities and inconsistencies within and across national policy frameworks. Our work should offer both the theoretical and empirical basis for future in depth analyses.

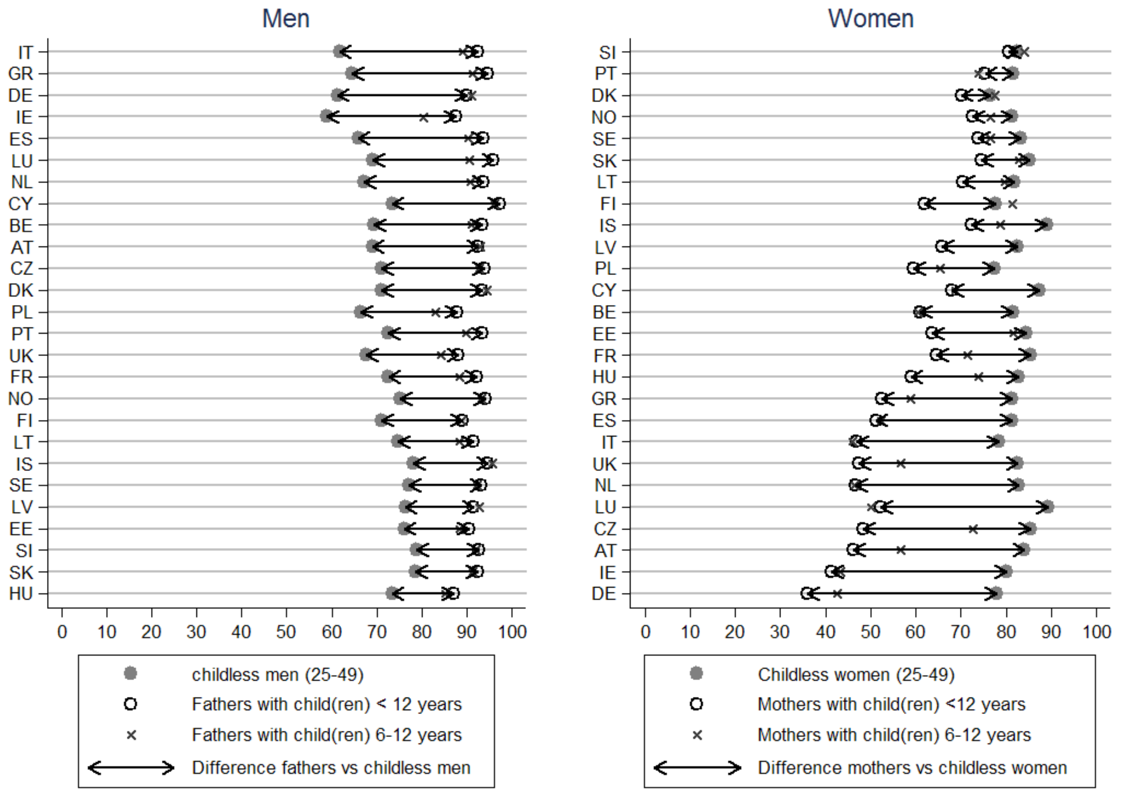
The data is taken from the Multilinks database on intergenerational policy indicators (http://www.multilinks-project.eu/) which includes a variety of policy areas and legal norms that shape the responsibilities between generations to support each other either financially or in providing care.[1] The empirical analysis includes all 27 EU Member States as well as Norway. We present the most recent figures at hand, possible around 2009; but for some indicators we have to go back to the first 2000s.

## *Gender and child care responsibilities*

When a child is born parents have to decide whether and how to share the time for child care and what other resources from the family, market or public providers they will use for their child care arrangement. As figure 1 shows, mothers' life course tracks are clearly marked by the birth of children and in particular the first years after child birth have been identified as decisive for future employment and family careers (Waldfogel et al. 1999, Lalive and Zweimueller 2005). This seems to occur also for fathers, but to a lower degree and in an opposite way. Facing increased household consumption and having on average higher wages compared to their spouses, fatherhood constitutes an incentive to further invest in labour market participation. Fathers – independent from the age or number of children – have higher employment rates then childless men of the same age (fig. 1). However, whereas for mothers a large bulk of studies show that having children decrease labour market participation, there is no evidence that fathers increase work time or employment. Longitudinal data show that men's employment patterns remain fairly unchanged when becoming a father in the countries under study (Blome et al. 2009). The difference in employment rates between childless men and fathers is predominantly caused by a selection into fatherhood through full-time employment. Men who are not employed, or work only part time, are less like to become fathers. This may reflect that the male role model as the breadwinner still persists, among both men and women. Even women would prefer to see their partner in a full-time position before planning to have a child with him.

[1] For a detailed description on the indicators, problems in comparability and national deviances see the methodological report attached to the online database (Keck et al. 2009).

Figure 1: Employment rate in full-time equivalent for men and women with and without children




Source: EU-SILC 2006, own calculations

Leaves and child care services have traditionally been and still are the main policy instruments through which part of the caring responsibilities of mothers (recently also partly redefined as responsibilities of parents) are financially supported with public money (de-commodified supported familisation), or shifted to public responsibility (de-commodified de-familisation). The combination of leave patterns (duration, generosity, fathers' entitlement) and patterns of childcare services offer (coverage, quality, cost), particularly for children under three shapes the context in which parents, and particularly mothers, take their decisions concerning whether and how to combine paid work with childcare responsibilities, given their resources, constraints and preferences.

In the literature, leave policies are considered decisive, but ambivalent, drivers of the gender specific impact of parenthood on labour force participation (Aisenbrey et al. 2009, Bird 2003). Long (paid) leaves – although in principle securing the labour market position - are identified as de-incentivising mothers to fully re-integrate into the labour market as well as constraining their ability keep pace with changing job conditions. They may therefore crystallize the gender division of labour and responsibilities towards children (Lewis, 2009). Short leave periods also put mothers at risk to drop out of the labour market, since they cannot combine working demands with the needs of an infant and their perception of a child's welfare. They may also have a divergent impact on women holding different positions in the labour market. Some studies have shown that (too) short leaves have a restraining impact on fertility among the better educated, while they increase the likelihood that low educated women with little paying jobs do not return to the labour market (Waldfogel et al. 1999, Esping-Andersen 2007). A partly opposite effect may occur in case of long, but unpaid or little paid leaves.  Mothers in a well off household may afford to take them, while mothers in less affluent households may not.[2] Of course, how long a "too long" and how short a "too short" leave is depends to a large degree on the cultural and socio-economic context. The UNICEF report on "The child care transition" (2008), on the basis of existing knowledge and research findings, sets the length of optimal leave, from the child's well-being perspective – at one year at least 50% of earnings. But length and compensation are only one side of the coin. The other is which parent takes what part of the leave. Although it is true that long leaves are mostly taken by mothers, the opening up of leaves to fathers, and in some country the introduction of a reserved – take it or loose it – quota for fathers may contribute both to granting an adequately long caring time to small children and to reduce the gender division of caring responsibilities, thus reducing also the negative impact on mothers' labour force participation.

Within the EU, only few countries – France Norway, and Sweden[3] – offer both very long (over 18 months), partly paid leaves and high child care coverage rates for the under three (table 1), thus allowing a degree of choice on how to combine different forms of care provision between supported familisation and de-familisation. Many countries offer shorter leaves, but still quite long by OECD standards and even longer (between 12 and 18 months) than the time suggested by UNICEF (2008) in its recommendation. No country does not offer any support, that is any alternative to familialism by default and/or commodification of care. But Greece, Poland, Cyprus and Portugal come close to this. Several countries clearly frame their policies according to decommodified supported familialism and late return to the labour market by offering long leaves but low public child care coverage. Austria, Czech Republic and Hungary are most straightforward, since they provide payments for the whole, long, parental leave period. The only country which clearly supports de-familialisation of care and an early return to the labour market is Belgium, with a comparatively short leave time and a comparatively very high coverage rate (56 percent in 2004.) for children under the age of three.

Table 1: Leave time and child care coverage for children under three

| | | Parental leave[1] time (**paid**/overall)[2] | | |
|---|---|---|---|---|
| | | Short<br><12 months | Medium<br>12-18 months | Long<br>>18 months |
| Coverage rate 0-2 | Low (<15 %) | **GR**, **PL** | **BG**, **DE**, GR, **IT**, **LU**, **NL** | **AT**, BG, **CZ**, DE, **HU**, PL, |
| | Medium (15-33%) | **CY**, **IE**, **PT**, **ES**, **UK** | IE, UK | **EE**, **FI**, **SI**, **LV**, **LT**, **SK**, ES |
| | High (>33 %) | **BE**, | **DK**, **SE** | **FR**, **NO**, SE |

Source: Multilinks Database 2010

1 Including the portion of leave reserved for mothers after child birth, which in most, but not all countries is often a separate kind of leave, usually defined maternity leave.

2 in bold letters the total paid leave, irrespective of level of payment; in normal letters the total paid and unpaid leave. A country may therefore appear twice in the table.

2 A different issue we may not address here is that many working parents are not entitled at all to a parental leave, because of their contractual conditions.

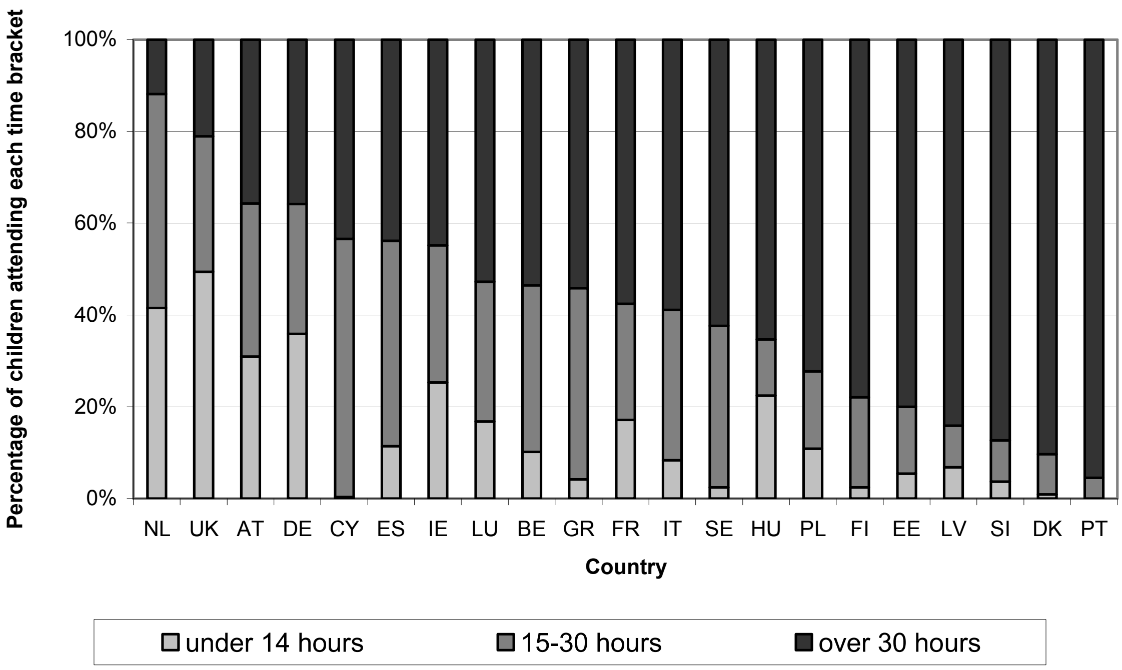
3 Within Germany, there are substantial differences in child care coverage between East (more generous) and West Germany. Also the average parental leave taken by mothers is about 1 year shorter in East than in West Germany. This difference, however, may be explained not only through the differential availability of child care policies, but also to cultural reasons and specifically to distinct female models (Gerhards and Hölscher 2003)

As it has been observed (Plantenga and Remery 2005, Unicef 2008, Saraceno and Keck 2010, Ray et al 2010), not only duration, but also level of compensation of parental leave is important. In some country, parental leaves may be long, but with no or little payment, in others, payment goes down after a given period and so forth. To this purpose, the concept of effective parental leave has been developed, weighing duration of leave with duration and level of compensation. Of course, depending on the yardstick against which the level of compensation is assessed (in reference to the minimum income, as in Plantenga and Remery 2005, to the individual wage, as in Unicef (2008), to the average wage as in Saraceno and Keck (2010), the ranking of countries may differ. Overall, however, the longest effective leaves are found in some of the former communist countries – Hungary, the Czech Republic, Lithuania, Estonia – plus Norway. The shortest effective leave is found in Spain, Portugal, Poland, Ireland, Belgium, the UK and the Netherlands.

From the perspective of mothers' labour force participation, the possible impact of the duration of effective parental leave must be evaluated also in relation to the availability of childcare services. Non parental child care may be provided by other family members, by the market, or by public bodies. Since we are interested in the degree to which childcare responsibilities are shifted to public responsibility, we consider only public (or publicly financed) child care coverage rates. The first column of tab. 1 above shows that there is an ample cross country variation in the de-familizing/ decommodifying of child care through publicly supported child care services, particularly for children under three. At the same time, if we consider these data with those on parental leave – gross and effective duration – there is not always a coincidence between the end of leave and the availability of child care. This coincidence (almost) occurs in Denmark, Sweden, Norway, Belgium, France, and to a lesser degree in the Czech Republic, Lithuania and Estonia. On the contrary, there is a substantial childcare gap for the under three in Ireland, Italy, Spain, Portugal, Cyprus, the UK, the Netherlands, and only slightly smaller in the other countries (see also Saraceno and Keck 2010). Thus only in the first group of countries public policies fairly support the employment of parents/mothers with a small child, showing coherence and continuity in their instruments, although suggesting a different timing and balance between supported familisation and (partial) de-familisation).

We are fully aware that national averages in childcare services coverage may hide substantial intra-national differences, as in Germany, France and Italy. Further hidden differences concern opening hours and the level of co-payment required. There is, however, only very limited comparative information about these issues (European Commission 2004). Data from the EU-SILC survey offers information on average weekly hours in a childcare service, without distinguishing between public and private ones (fig. 2). Weekly hour, however, may depend from opening hours, from the amount of service time is acknowledged to parents given their working time (as in Germany), from cost (particularly in private services), or from preferences, as in the Netherlands, where there is a strong preference for part time attendance (Ministerie van Volksgezondheid, Welzijn en Sport, 1997, Knijn and Saraceno 2010).

Figure 2: Child care time usage among children age 0-2 being in a child care facility (2006)




Source: EU-SILC 2006, own calculation
Results are not weighted because in some countries there are no population weights given for those children born in 2006.

There is a clear distinction between two groups of countries. In one, child care usage is in a majority of cases on a part-time basis, which may correspond to a high share of part-time employment of mothers, if no other family support from the spouse or grandparents is provided. This is in particular true for the Netherland and UK but also for Austria, Germany, Cyprus, Spain, and Ireland. With the exception of Cyprus and Spain, all these countries have comparatively high part-time employment rates of mothers.[4] Luxembourg and Belgium are close to this group, also having high part-time rates (BE: 24%, LU 33%). In the second group of countries, child care services are in most of the cases used on a full-time basis. This is in particular the case for Portugal, Denmark, Slovenia, Latvia, Estonia and Finland, all countries in which the part-time employment rate of mothers with children under 6 years is lower than ten percent. Also Poland and Hungary are close to this group and have similar low part-time employment rates. The intra-group similarities in childcare time usage, as well as in the incidence of part time work for women/mothers, however, hide, sometime substantial, differences in coverage rates on the one hand, women/mother's labour force participation rates on the other. In Poland and Portugal, for instance, children attending full time services are much fewer than in France or Belgium, given the lower coverage, as shown in tab. 1.

[4] According to own calculations on the basis of 2006 EU-SILC data, part-time employment rates of mothers with children under the age of six range from 3 percent in Slovakia up to 52 percent in the Netherland. In Ireland it is 24 percent, in Austria 26 percent, in UK 33 percent, and in Germany 42 percent.

## Fathers leave options

Assessing the gender equity of parental leave is not a self evident process. Opinions on the gender bias of parental leave regulations differ (Gornick and Meyers 2004, 2009, O'Brien 2009 and Ray et al. 2010) - although they differ on the specific technical measurements, assess the degree of gender equity on the basis of the extent to which not transferable leave rights and benefits are granted to men as well as to women and the nature and incentives for male take up. In this approach, gender neutrality and lack of specific allocation of leave time to either parent would count as less gender equal than a division of leave time in half for each parent. But in McDonald's view (2009), the reverse is true and particularly any specific allocation of time (plus incentive) to fathers is gender specific, while neutrality and free use are not. We share Gornick and Meyers and O'Brien's criteria, in so far we believe that gender neutrality and open use of leave time will be really a matter of choice with no impact on gender equity only when men and women as parents and employers will consider it normal that also fathers want and are able to take time off to care intensively for a small child. Until then, fathers' quotas and incentives are the analogous to positive actions directed to supporting women's presence in the labour market, thus a measure of equalization. Being incentivised to take a (comparatively long) leave seems to have a long term impact on caring behaviour (see Sullivan et al: 2009).

Two measures have been found of key importance to incentive fathers to take part of the leave: 1) a reserved quota for each parent, or for fathers, of the overall leave time, and 2) and an adequate (around 60% or over) compensation of lost earnings (e.g. Unicef 2008).[5]
Figure 3 shows a) how much time of the total parental leave is specifically reserved to fathers; b) how much time of the total leave fathers might theoretically take (also in addition to the reserved quota, or without the reserved quota) is well compensated for, with a replacement rate 60% or more of individual monthly earnings. There are three groups of countries. The first group offers well paid leave for several months which can be shared between parents. This concerns the Nordic and some Eastern European Countries as well as Germany, since the reforms in 2007. Finland, Germany, Norway and Sweden also reserve a minor part of the well-paid leave time only for fathers. In Greece and Luxembourg parental leave is framed as an individual right for each parent; it is well paid but comparatively short.[6]

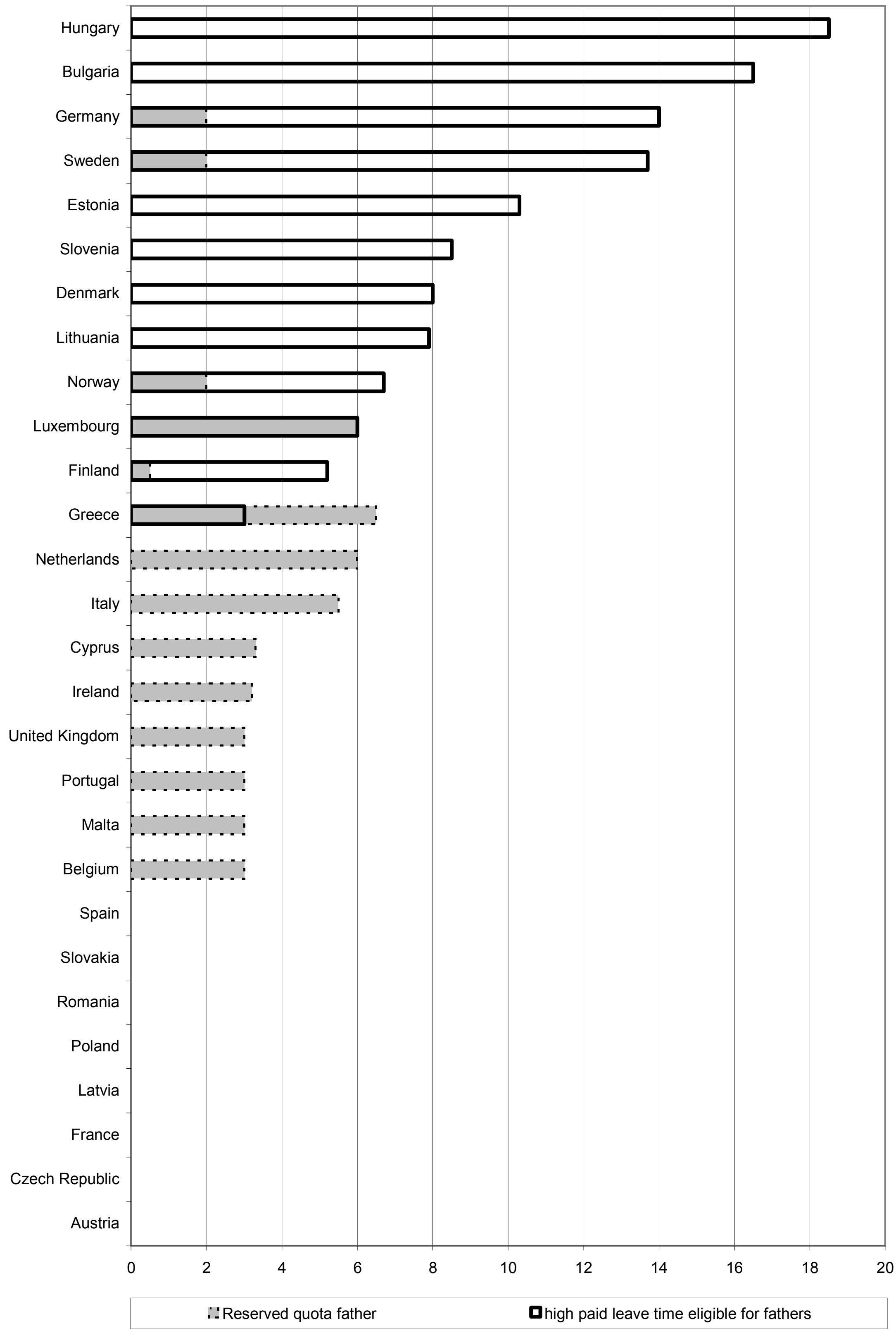
The second group consists of countries which reserve a quota of the parental leave for fathers, but, as for mothers, with no, or low income replacement. It includes the Mediterranean countries - Cyprus, Italy, Malta, and Portugal - with the exception of Spain, Ireland, the United Kingdom, Belgium and the Netherlands. There is not so much variation in the length of leave dedicated to fathers, but with regard to income replacement level this group might be subdivided into countries with no financial support - Cyprus, Ireland, Malta and UK - and the other four countries, which offer around 30 percent income replacement.

[5] Two other measures might foster fathers' caring contributions. Paternity leave and flexible usage of leave time. Paternity leaves are present in many, but not all countries, usually are restricted to 15 days around the time of child birth. It is more a means of fostering coupe's sharing when a child arrives and of supporting the mother in the first period after pregnancy than a means of encouraging fathers to take main responsibility. Flexible usage of parental leave allows both mothers and fathers to stretch it, meeting the needs of children for a longer period, while reducing the length of time of full absence from work, thus reducing both the risk of estrangement from work and the income loss, particularly when it is allowed to combine part time work with part time leave.
[6] In Greece payment is only provided for the addition child care leave which may follow after the unpaid parental leave.

The last group includes countries which neither have a reserved quota for fathers nor have a good level of compensation, therefore lacking both of what empirical studies have found as the two prerequisite for incentivizing fathers to take at least a portion of the leave. In particular, Poland and Spain provide income support during parental leave only on a means-tested basis, whereas the other countries offer very low compensation.

Incentives for father in most countries have been introduced very recently and we would not expect to find already long-lasting effects on fathers' employment participation and/or family work habits. But also in countries, such as Norway and Sweden, where they have been in place since the seventies (Leira 2006), data on the use of time suggest that fathers do share more child caring activities, but, differently from mothers, without reducing, in the medium and long term, their paid working time, and certainly not their labour force participation. Furthermore, in these countries, as well as in Denmark, the partial closing of the gender gap in childcare seems to be more the consequence of the partial de-familization through services than of a substantial gender rebalancing within the household. Public policies, therefore, appear a crucial instrument of gender equity more through relieving mothers of part of "their" tasks than through incentiving fathers to take a larger share (see Aliaga 2006, Gershuny and Sullivan 2003).

Figure 3: Reserved quota for fathers and total length of leave which fathers are entitled to take which is paid 60% of earnings or more. 2009

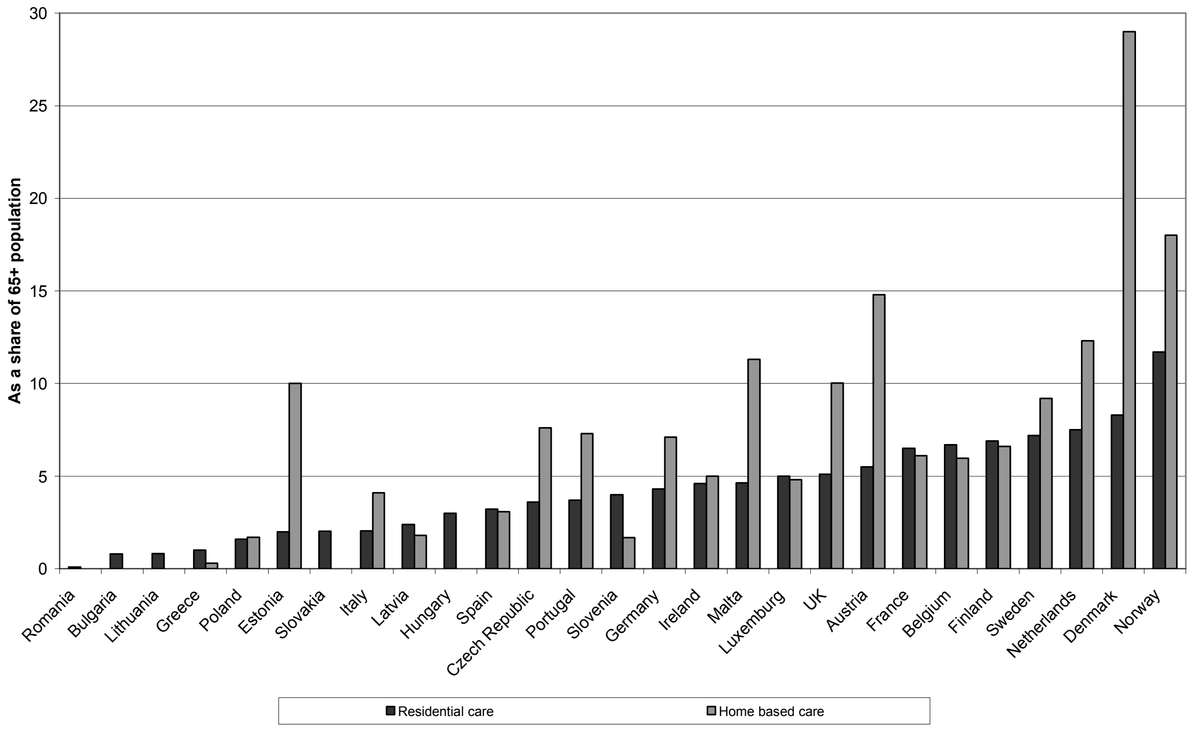



Source: Multilinks Database 2010

## Gender specific assumptions in supporting care for the frail elderly

Public policies shape gender specific decisions at the time when close relatives are in need of care and families have to decide who is responsible for caring. At that phase of life, mostly in the second half of the life course, gender specific career tracks are often already well consolidated, although there are class differences as well as differences between women belonging to the same family (Arber and Ginn 1992, Finch and Mason 1993). Policies may further strengthen these gender and class differences, while also strengthening family interdependencies, or on the contrary may reduce them, or offer alternative options. Decisive, in this perspective, is the availability and affordability of long-term care services, although in all countries, including those with the highest provision of services, i.e. with the highest degree of de-familsation, the family is the main care provider (see e.g. Johansson et al. 2003). Comparative studies show that the number of family members who provide care does not differ substantially between countries, but care intensity does. It is lower in service-rich countries compared to service-poor countries (Daatland and Herlofson 2004, Haberkern and Szydlik 2008). This shows that de-familialisation does not crowd out family solidarity. It rather relieves family carers, who are mainly women, from some of the hands-on care work.

Figure 3: Care service provision (residential, home based)




Source: Multilinks database 2010

Figure 3 shows places in institutional care facilities and usage of home care services related to the population aged 65 years and over. Care service support is however not always a public domain. Even when it is so, the share of private means required to co-finance long-term care services differs between the countries (Pacolet et al. 2000). Country differences in coverage may be both a cause and an effect of a differential demand, driven by conditions of affordability, quality, as well as preferences. [7]

Even with these limitations, data in figure 3 are coherent with what we know from the literature and more detailed policy descriptions concerning a smaller number of countries

[7] Moreover it is important to consider that the number of people with care needs might differ because of differences in the population structure and health conditions between countries.

(OECD 2005, Theobald 2008, Pacolet et al. 2000). The Nordic countries as well as the Netherlands provide most comprehensive care service support. On the opposite end, Central and Eastern European countries and the Mediterranean countries (except Malta) provide only residual long-term care service support. Here, families, and mostly women within them, bear the main caring responsibility, buying, if they have the means, all or part of caring work in the market (Lamura et al. 2008).

A different policy approach to acknowledge care work is to provide cash allowance for caring. The impact of such allowances may not be easily classified s being either a form of de-familisation or on the contrary of supported familisation. Cash benefits, in fact, may be paid to the care recipient in the form of a personal budget which must be used to purchase services under a formal contract/labour relationship. In this case cash benefits are as a de-familialising instrument as the direct provision of services. This is the case in countries like France, Luxembourg, the Netherlands or Norway.

In other countries, the amount of the care allowance is low and payment is directly given to family carers with no option to alternative service usage and without establishing a form of contractual relationship providing social security entitlements, like in Bulgaria,, Cyprus, Estonia, Hungary and Malta. In this case, policy supports gender specific family care giving, in so far it is mostly women who care. The Czech Republic, Ireland and Slovakia offer both kind of cash subsidies: for hiring professional services and for a family carer. In still other countries, the care allowance is paid to the care recipient who can use it as he/she sees it fit. In case the care recipient is not in the condition to decide, the decision may be taken informally by his/her family. This happens in Austria, Belgium, Finland, Germany, Lithuania, Italy, Poland, Portugal, Slovenia, and United Kingdom. In these cases, which are an example in between supported familialism and famililism by default, care may be provided by a family member without any compensation, or partly compensated informally out of the allowance; or the allowance may be used to buy services in the informal (often migrant) market. Some of these counties like Austria or Germany provide the option to choose between publicly financed services provision and cash payments. Here supported familialism and de-familialisation seem to be balanced but looking at the take up of rate of cash allowances or service provision, in both countries financial provision that is supported familialism dominates.

Table 2: Cash-for-care payments (preliminary)

| Cash-for-care payments | Countries |
|---|---|
| No | Denmark, Greece, Sweden Latvia |
| Yes, unbound | Austria, Belgium, Bulgaria, Estonia, Finland, Germany, Italy, Lithuania, Italy, Poland, Portugal, Slovenia, United Kingdom, Spain |
| Yes, formally bound, predominantly for professional service usage | *Cyprus, Czech Republic*, Denmark, France, *Hungary, Ireland*, Latvia, Luxembourg, Malta, Netherlands, Norway, Romania, *Slovakia*, Spain, Sweden, United Kingdom |
| Yes, formally bound, formally bound but only to pay family carers or reserved for family carers | Bulgaria, *Cyprus*, *Czech Republic*, Estonia, Hungary, *Ireland*, *Slovakia,* Malta |

Source: MISSOC 2010

Note. National informants say that in Spain such allowances should in principle be used to pay for services, but since the offer of services is still low, a range of discretion is allowed. The same seems to apply in Portugal. Latvia and Estonia do not have a national law. Care benefits depend on legislation at the municipality level. In Cypurs, Czech Repbulic, Ireland, and Slovakia there are both payments for services as well as payments to family carers available. These countries occur in two rows and earmarked in italics.

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Only three countries– Greece ,Denmark and Sweden - do not offer financial benefits in case of care dependency. In Denmark and Sweden, However, municipalities can employ a family carer in working age if (s)he is willing to care for a dependent family member. But this is rarely the case, because of the substantial professional service provision. As figure 3 above shows, long-term care in Denmark and Sweden is highly de-familialised compared to other countries. In contrast, Greece only provides benefits within the invalidity insurance and at the same time has a rudimentary care service supply. The Greek example is a clear case of familialism by default, relying heavily on the availability of family solidarity and particularly of (some) women within it.

The traditional instrument of supported familisation in the case of child care – leaves – is provided in most European countries also in the case of elderly care, but it is far less generous. There are two options: a leave of at least a few months which may be taken once for each person cared for and which is generally unpaid, or a short term leave of a few weeks, which sometimes paid. In some countries like Germany or Italy both leave options are available. Austria, Bulgaria, Czech Republic, Finland, Poland, Portugal, Slovakia, Slovenia offer only short-term leaves (5- 36 days per year). In the UK, there is no statutory leave, but the family directive stipulates that employers must allow employees to take an unpaid leave in case of a family emergency. In Sweden such a possibility is open only in case a family member is dying. The lack of payment of such a leave does not contribute to incentivizing men to take caring responsibilities that might hamper both their regular working performance and their income.

## How gendered are the measures of financial support for families?

Financial support for families, through direct benefits or through tax allowances, may be more or less neutral with regard to the gender division of responsibilities (Sainsbury 1996, Dingledey 2001). Child allowances, aimed at helping to support the cost of children, are in principle neutral if they are universal and not income tested on the household basis. On the contrary, they may encourage the gender division of responsibilities with regard to earning and caring when they are household income tested, particularly in the case potential, or actual, earnings are very asymmetrical within the couple, or the second earnings are too low to offset the value of benefits. A strict household income test for child allowances is applied in Poland and Spain. Other countries gradually reduce the child allowance with increasing parents' income but a considerable amount is paid also to parents with average income. This is the case in Bulgaria, Cyprus, Malta, Romania and Slovenia.[8] In Italy, there is a dual household income test: at least 70% of total household income must be earned in wage work (the self employed are excluded) and entitlement to and amount of the allowance are defined in relation to household income and composition.

This renders the partner, mostly the woman, who forfeits, or reduces her earning potential because it appears more rational from the perspective of the household economy, more vulnerable to the risks of couple's instability, in the medium as well as in the long (in old age)

[8] Information is taken from the Multilinks database on intergenerational social policies (2010).

term. A similar effect occurs in various forms of joint taxation (such as the German splitting system or the more complex French family quotient). On the contrary, the acknowledgement of caring periods in the pension system partly compensates the negative impact of the “caring penalty” on wages and work history; therefore, in principle, it has a rebalancing impact on gender differences in pension wealth, even if it might offer a kind of legitimacy to the gender division of labour.

Tax systems consider unequal combination of earnings between partners differently. Three approaches may be detected: first, individualised taxation rules without any consideration of partners’ earnings. This approach is found in Cyprus, Finland, Greece, Hungary, Latvia, Lithuania, Netherlands, Norway, Slovenia, Sweden, and UK. In these cases, the tax debt is accounted independently from marital status or spouses’ income. If and how large income differential between partners are, does not matter for the overall tax debt. There is no support for a (male) breadwinner-(female) family carer model. The second approach also is based on individual taxation, but with tax allowances or tax credits for the main earner if the spouse has no or low income. It is the case of Austria, Denmark, Estonia, Ireland, Italy, Luxembourg, Slovakia, and Spain. Indirect public financial support to gender unbalance in earning (and indirectly to a gender division of responsibilities) is only provided up to a certain income threshold of the partner with lower earning. In this case, an increase in income of the partner below the benefits threshold is counter-balanced by a loss of tax benefits of the spouse with higher earnings and therefore devalues the earnings from partners in the lower income range. No such devaluation occurs if the earnings of both partners are clearly above the tax benefit threshold. The third approach is based on joint taxation either of the couple or the household. It is adopted by Belgium, Czech Republic, France, Germany, Ireland, Luxembourg, Malta, Poland, and Portugal. A couple-based joint taxation equals the tax burden between the earners in the family. A household based taxation (as in the French family quotient), divides the overall household income among all household members, on the basis of a coefficient. In progressive tax systems, both forms of joint taxation may cause substantial savings in overall tax as well as in the tax individually owed by the higher earner, if one of the partners earns considerably less than the other (and in the household based system also if the household is large). At the same time, an income increase of the partner with lower earnings increases disproportionally the overall tax due, which again devalues additional earnings in the lower income range. Unlike the tax allowances for spouses with low or no income, the negative tax impact for the lower income earner and the positive impact of the high income earner ceases only when both partners earn the same income. It is highest for a one earner couple.

In dual spouse/parent households fiscal and financial policies help shaping the allocation of responsibilities for earning and caring between parents/spouses/partners. In the case of lone parents, mostly mothers, such an allocation is less straightforward, not only because in some case the partner/other parent has died, but because also the living other parent may have a different legal status with regard to the child(ren), as well as the parent who is living with them. In recent years, in many countries important changes have occurred in legal regulations both concerning the duties of the living but non co-resident parent and the main duties of mothers, particularly if they apply for social assistance. With regard to the former, joint custody, enforcement and standardisation of child support and so forth have strengthened both fathers’ rights and obligations. In this perspective, there has been a shift towards an increased familisation of the responsibility for the needs of children. With regard to the latter, EU countries still vastly differ in the way they address the needs and responsibilities of (poor) lone parents/mothers. In many countries, there are no specific measures for poor lone parents but they are mentioned in minimum income security and work activation measures as particular risks groups. In others, poor lone mothers traditionally where exempted from the

requirement to be available for work up to a given age of the youngest child (Saraceno ed 2002). This age might range between three years, as in France and Germany, or up to 18 as in The UK until the Seventies. Lone mothers within the child's age threshold might in some case (e.g. in France) benefit from a more generous income support than the general social assistance one. Particularly in the countries where lone mothers were more clearly treated mainly as carers, in recent years there has been a general move to considering them as mainly breadwinners, shifting away from de-commodification through social assistance (Knijn et al. 2007). The UK, the Netherlands and partly Germany are the clearest examples of this shift. In the UK, for example, the age of the child when benefits for lone parents stop has been reduced to 12 years in 2008 and again to 6 years in 2010. It still remains the highest age threshold in the EU, shared with the Netherlands, however. In the other countries where such a threshold operates, such as Germany, France, Latvia and Sweden, it is 3 years (see Finn and Gloster 2010).
The interplay between de-commodification through social assistance, commodification through labour market participation and strengthening of family responsibilities of both fathers and mothers as breadwinners designs however a complex puzzle in the case of lone parents/mothers, where the weakening of de-commodification (and dependence on the former partner/other parent) in the form of social assistance is the clearest trend, together with the partial de-commodified de-familization of child care through an often targeted offer of childcare services.

## *Acknowledging the gender division of labour and care work in the pension system*

Employment does not only provide an (independent) income at present but determines also old age security. This is of growing importance for those birth cohorts who are in working age at present and will be affected by the pension reforms which have taken place in most European countries. Their pension claims will be more tightly linked to their contributions, either because the principle of equivalence is strengthened within the public pension schemes or a larger part of the overall pension will be built on second tier occupational and private pension plans, for which claims are predominantly based on contributions (Holzmann et al. 2003). These developments may be cushioned to some respect by different policy measures: basic universal old age pensions independent from work and contributory history, income tested social assistance pensions for those who are not entitled to a contributions-based pension, non-contribution equivalents for caring periods and survivor pension benefits.[9] These different measures follow different logics in general and specifically with regard to gender arrangements. Basic universal pensions are both a means of decommodification and of de-familisation of financial needs in old age, the degree of which depends, of course, on generosity. Minimum social assistance pensions also are a means of both de-commodification and de-familisation, but only for the poor. Non-contributory equivalents in the public pension scheme acknowledge caring times for children or for an adult during working age[10], thus de-commodifying (i.e. delinking from the work history) a portion of contributions. At the same

[9] The level of non contributory minimum pensions is also important, but we assume that it does not affect decisions on employment versus family work, since almost nobody in working age develop its employment vs family investment strategies counting on a minimum pension in old age. In most countries, in fact, such a (generally social assistance) pension is below the at-risk of poverty line, measured at 60 percent of median household equivalence income.
[10] In case of children, child birth is enough to be granted the benefit where it exists; in the case of other dependent family members evidence of care must be produced.

time, increasing the pension wealth of family carers, they also strengthen their financial autonomy in old age, thus contributing to their financial de-familisation. They might also partly cushion the effect of the most recent pension reforms, which in most countries have more strictly linked pension claims to contributory records (Holzmann et al. 2003).
Finally, survivor pensions are derived family-linked rights. Only a formal relationship with somebody entitled to an old age pension grants access to this measure once the principal holder dies. In two countries, Cyprus and Hungary, survivor benefits are still only available to widows not to widowers. Survivor pensions are historically an exemplary expression of the male breadwinner model and a form of supported familialism, which continues also after the death of one's partner.[11] Their existence, moreover, while acknowledging the fact that, at least in the recent past, most women did not earn an own pension while contributing to the welfare of their partner and their family, indirectly promised them that they would be provided for in old age as far as they remained in a partnership. In most countries, they are being phased out, subordinated to an income test, or the duration of recipience is limited to a short period after the death of the original beneficiary in the name of individual entitlement and of women's financial autonomy, even if women continue to bear most of unpaid family work and on average suffer a caring penalty in their individual pension wealth. In addition to the survivor pension, most countries also regulate how pension rights should be divided between the couple in case of divorce. Usually, the non-earning or lower earning partner is entitled to a quota of the – present or future – pension based on the duration of partnership. The underlining logic is the same of the survivor pension: partnership builds up expectations and responsibilities and in many cases is based on a gender division of labour, which leaves one of the partners more vulnerable to the end of the partnership.

The synthesis in Table 3 provides a crude picture in particular with regard to survivors pensions and care acknowledgement, because they are the two measures that indirectly (in the case of survivor pensions) or directly (in the case of contributions for caring periods) acknowledge past caring work and shoulder the cost of contributions with public finances. Contributions for caring time may be additive and top up pension contributions from full or part-time employment, or substitutive and reward non-employment. They may increase pension claims by different levels, or only account for the waiting period to be eligible for a public pension. Finally, they acknowledge different durations of caring time. Even though detailed information was available – which is not the case for all countries – it is hardly possible to construct comparative indicators. We restrict our analysis to the availability of such non-contributory pension claims for caring, knowing that there is a need for more sophisticated measures.

[11] They are also a form of supported familialism with regard to surviving minor children.

Table 3:

| Modes of survivor benefits | Acknowledgement of care on pension claims | | |
|---|---|---|---|
| | Pension benefits for Child care and elderly care | Pension benefits for Child care only | No acknowledgement |
| Income related 60% and more | Austria, Belgium, Luxembourg, Poland, Slovakia | Cyprus[2], Hungary[2], Italy, Portugal | |
| Income related less than 60 % | Czech Republic, Germany, Norway | Estonia, France, Greece, Latvia, Spain | Malta |
| Flat rate payment | Ireland, Lithuania, United Kingdom | | Netherland (?) |
| No permanent payment | | Sweden | Denmark |

1 Bulgaria, Finland, Romania and Slovenia are missing.
2 Survivor pension are only granted for widows.
In several countries under study the income level of the survivor is accounted. In those cases we present the maximal rate available in the table.

In most European countries there are both survivor benefits and the acknowledgement of care periods at least with regard to child care. Most generous are Austria, Belgium, Luxembourg, Poland and Slovakia. In these countries, the need for income security in old age through individual pension contribution in a couple with a main breadwinner is reduced – if the couple has lasted "until death broke it". Most of the Southern, Eastern and Central European countries and Norway offer a similar package. But Greece falls behind due to a low survivor pension level (only 35 % of the original pension, down from 50%, three years after the death of the spouse. And Malta does not account for child or adult care periods. Lithuania, the UK and Ireland provide to the surviving partner only a flat rate payment, which means that individual pension claims are more important than elsewhere to maintain the standard of living after the death of the spouse. Ireland, Lithuania and UK however acknowledge caring time both for children as well as for adults. Sweden and in particular Denmark follow an individualistic way. In both countries there are no permanent survivor benefits and only Sweden takes account of child care provision during working life. Old age security is heavily based on individual entitlements. Therefore, there are strong drivers for men and women to stay in employment during the entire working life. In the Netherlands, married and unmarried (including same sex) partners earn an individual share of the couple's pension.
Mention should also be made of the lower retirement age for women, which was the norm in most countries until a few years ago and which now remains only in a few countries. This highly gender specific measure has been supported from at least two different perspective: as a form of acknowledging the dual burden of working women and as a means of "freeing" women so that they could take care of their, usually older, husbands and frail parents and parents in law (Franco 2002). Whatever the argument, the effect is to further reduce the pension wealth of women, since they have less time to build up their contributory record while having on average lower wages than men and a more interrupted work career. This trade-off may appear fair, as long as one has access also to the pension of a spouse. But if one does not, it may result in higher risks of economic vulnerability in old age.

## *Conclusion (preliminary)*

Using the conceptual framework of supported familisation, defamilization and familization by default as they interact with the dimensions of de-commodification and commodification of needs allows to better understand the possible impact of policies on gender (in)equity. It also allows to better assess the degree of coherence or incoherence, from a gender equity perspective, of the overall package of policies, and of specific sectors within them, dealing with the needs of care and earning in households with dependent family members – young children or the frail old. [12]

There are four distinct approaches:
First, a mix between supported familisation and de-commodified de-familisation in the case of child care, de-commodified de-familisation in the case of elderly care as well as financial autonomy independent from family relationships in old age and strictly individual taxation, allow (but also incentive) women a degree of independence, while gently incentivising fathers to take up some child care. In these countries, there is little acknowledgement of unpaid family work either trough contributions towards a pension, a survivor pension, leaves for elderly care or cash for care allowances. This is in particular the case for the three Scandinavian countries in our analysis: Denmark, Norway and Sweden

The second approach apparently supports women's permanence in the labour market, granting a long job protection due to long paid parental leaves, but with little attention for the long term risks of a too long distance from the labour market and leaving a childcare gap between end of leave and childcare coverage. Also incentives for fathers to share part of parental leaves are usually lacking or weak, with the post 2007 German exception. Little or no support, particularly in the form of services, for elderly care; but cash for care payments and care leaves are available. The negative trade-off in old age for women between earning and caring neither compensated by generous survivor pensions nor by caring benefits in the absence of a universal basic pension. This pattern is clearly pronounced in Austria, Bulgaria, Czech Republic, Germany, Poland, and Spain. In other cases - Estonia, Hungary, Latvia, Portugal, Slovakia - the policy framework is similar, but fuzzier, since it does not emerge distinctly throughout all policies.

We might define the third approach as internally divergent between supporting gender equity (even if at the cost of not fully acknowledging unpaid family care) and supporting a modified form of the male breadwinner/female carer model, depending whether children or the frail elderly are involved. France belongs clearly to the first approach with regard to the public support of child care and comes close to it also for elderly care, but adopts the second approach with regard to taxation and acknowledging the gender division of labour in the public pension scheme. Luxembourg follows the second approach in child care and financial acknowledgement of caring/low spouses' income, but it is close to the first pattern for elderly care. In the Netherlands, financial support and public long-term care provision belong to the first pattern, while child care regulations are more linked to the second pattern, mostly because of a strong emphasis on part time work for women.

Belgium is a specific case. With regard to taxation, care acknowledgement in pension schemes, survivor pension and elderly care, it is close to the second pattern. In the case of

[12] Because of data gaps we are not able to assess all EU countries. For Bulgaria, Cyprus, Malta and Romania too few information is available. All what we may say on the basis of the available data is that these countries certainly do not belong to the first pattern.

child care, however, it appears even more de-familialised than the Scandinavian countries. Childcare coverage is in fact comparatively high, but paid parental leaves are short.

The fourth pattern encompasses countries which to a large degree pay lip service to the need to stress women's labour market participation and sometime to gender re-balancing, but neither have supportive policies towards this aim, nor adequately protect women from the trade-off between earning and caring in old age (and if a couple breaks up). This pattern is represented most clearly by Greece. Italy is somewhat in between this and the second approach. In this country, in fact, there is a – weak – supported familialism in parental leaves, with a, weak, incentive for fathers. There is also some indirectly supported familialism in elderly care and child-linked caring periods are acknowledged in the pension scheme. But all things taken together both supported familialism and de-commodified de-familisation remain very partial, offering very few resources to re-negotiate the gender division of labour.

Finally, Finland, Ireland, Slovenia, and United Kingdom may not be easily allocated to any of these four approaches, since they occupy an intermediate position on all or most policy measures.

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