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*Network for integrated
European population studies*

NIEPS

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European Commission

**Network for integrated European population studies
NIEPS**

Final report

Thematic Network HPSE - CT1999-00005
Funded under the Key Action
'Improving the Socio-Economic Knowledge Base' of FP5

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PREFACE

Within the Research Fifth Framework Programme of the European Union, the Key Action "Improving the socio-economic knowledge base" carried broad and ambitious objectives, namely: to improve our understanding of the structural changes taking place in European society, to identify ways of managing these changes and to promote the active involvement of European citizens in shaping their own futures. A further important aim was to mobilise the research communities in the social sciences and humanities at the European level and to provide scientific support to policies at various levels, with particular attention to EU policy fields.

The Key Action Call "Improving the socio-economic knowledge base" had a total budget of 155 Million of Euros and was implemented through the launch of three Calls for proposals. As a result, 185 selected projects for funding have started their research work between 1999 and 2002, involving more than 1600 research teams from 38 countries.

At least half of these projects are now finalised and results are systematically published in the form of a Final Report.

The Calls addressed different but interrelated research themes which have contributed to the objectives outlined above. These themes can be grouped under a number of areas of policy relevance, each of which are addressed by a significant number of projects from a variety of perspectives.

These areas are the following:

- Societal trends and structural changes;
16 projects, total investment of 14.6 Million Euro, 164 teams
- Quality of life of European Citizens,
5 projects, total investment of 6.4 Million Euro; 36 teams
- European socio-economic models and challenges
9 projects; total investment of 9.3 Million Euro; 91 teams.
- Social cohesion, migration and welfare
30 projects, 28 Million Euro; 249 teams.
- Employment, and changes in work
18 projects; total investment of 17.5 Million Euro; 149 teams
- Gender, participation and quality of life
13 projects; total investment of 12.3 Million Euro; 97 teams
- Dynamics of knowledge, generation and use
8 projects; total investment of 6.1 Million Euro; 77 teams
- Education, training and new forms of learning
14 projects; total investment of 12.9 Million Euro; 105 teams
- Economic development and dynamics
22 projects; total investment of 15.3 Million Euro; 134 teams
- Governance, democracy and citizenship
28 projects; total investment of 25.5 Million Euro; 233 teams
- Challenges from European enlargement
13 project; total investment of 12.8 Million Euro; 116 teams
- Infrastructures to build the European Research Area
9 projects; total investment of 15.4 Million Euro; 74 teams.

This publication contains the final report of the Thematic Network, "Network for integrated European population studies" whose work has primarily contributed to the area "Societal trends and structural changes" .

The report contains information about the main scientific findings of the network and their policy implications. The research was carried out by 11 teams over a period of 3 years, starting in April 2000.

The main objective of the Network for Integrated Population Studies (NIEPS) was to create a European platform of national population institutes in Europe that would promote a dialogue and foster research cooperation on policy domains of population and family dynamics and socio-economic processes. Three interconnected key structural demographic changes were addressed:

- Gender relations, family-building and patterns of work;
- Ageing, intergenerational solidarity and age-specific vulnerabilities;
- Demographic and cultural specificity and integration of migrants.

The analysis of the recent trends in the three themes confirm that European societies are confronted with critical population and family problems that require integrated and fine-tuned policy adaptations as well as structural policy reforms. NIEPS identified, for each of its three themes, a number of social policy implications which are spelled out in the chapter dedicated to the policy conclusions.

As the results of the projects financed under the Key Action 'Improving the Socio-economic knowledge base' become available to the scientific and policy communities, Priority 7 "Citizens and Governance in a Knowledge Based Society" of the Sixth Framework Programme of the European Union for Research and Technological Development (RTD) is building on the progress already made and aims at making a further contribution to the development of a European Research Area in the social sciences and the humanities.

I hope readers find the information in this publication both interesting and useful as well as clear evidence of the importance attached by the European Union to fostering research in the field of social sciences and the humanities.

T. LENNON,
Director

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ABSTRACT

The general and main objective of the Network for Integrated Population Studies (NIEPS) was to create an all-European platform of national population institutes in Europe that would promote a dialogue and foster research cooperation on policy relevant interactive domains of population and family dynamics on the one hand and socio-economic processes on the other. Three interconnected key structural demographic changes were addressed:

- Gender relations, family-building and patterns of work;
- Ageing, intergenerational solidarity and age-specific vulnerabilities;
- Demographic and cultural specificity and integration of migrants.

The activities of the Network were implemented through six thematic workshops and three technical meetings. The thematic workshops undertook a retrospective and comparative analysis of demographic trends and policy actions, and prospectively examined alternative strategies to improve policies by identifying best practices and proposed research strategies and instruments which will enable future innovative and transnational comparisons of data and policy impact analysis. The intermediate technical meeting between the two workshops of each theme provided an in-depth critical evaluation of theoretical frameworks and research instruments currently used in the given domain and delivered outlines of new frameworks for future comparative research.

The Network produced for each one of the three themes the following results:
An overview of the major recent trends and their explanation;
Suggestions for future comparative and cooperative research;
Identification of socio-demographic policy implications of the findings.

The analysis of the recent trends in the three themes confirm that European societies are confronted with critical population and family problems that require integrated and fine-tuned policy adaptations as well as structural policy reforms.

Development of strategies for adaptation and reform require solid knowledge base of national specificities and similarities and an all-European synergy in view of developing comparative research projects based on micro level data collection and other research instruments. For each of the themes studied a number of concrete research topics are suggested and new and innovative comparative all-European surveys that would produce both statistically robust data and qualitative results are proposed.

NIEPS identified, for each of its three themes, a number of social policy implications. Most of them are, obviously, theme-specific. Nevertheless, also a few general implications were stressed, such as the need to integrate the policies pertaining to the three themes studied in an integrated population friendly framework, the need to integrate population and family related policies in other policy domains more particularly in the economy, the need to develop policies that duly take into account processes over the entire life course, and the need to envisage also long-term, intergenerationally equitable dimension of population policies.

1. EXECUTIVE SUMMARY

Network for Integrated European Population Studies (NIEPS)

The Network for Integrated European Population Studies (NIEPS) brought together 11 national population institutions from European Union and transition countries that have a similar mission. These national population institutes or centres have as a specific mandate to undertake scientific research on population issues and are frequently called to inform and advise the government and public authorities on the policy implications of population dynamics. Those institutes are governmental bodies or governmentally financed institutions whose mission consists of systematic monitoring and analyses of population dynamics and the study of implications for society and policy making.

NIEPS set out to promote transnational co-operation in comparative policy-oriented research and policy impact analysis in the domains of (1) gender and family development, (2) ageing and solidarity, and (3) integration of migrants. The Network was launched in April 2000.

Objectives

The general and main objective of the Network for Integrated Population Studies (NIEPS) was to create an all-European platform that would promote a dialogue on policy relevant interactive domains of population and family dynamics on the one hand and socio-economic processes on the other.

NIEPS had two specific objectives which include both a retrospective and prospective dimension: (1) on the basis of a retrospective analysis of demographic trends and policy actions in the three identified thematic domains, examine prospectively alternative strategies to improve policies by identifying best practices; (2) undertake, retrospectively and on a comparative basis, an in-depth examination and evaluation of survey instruments used in countries under consideration in the three domains in order to, prospectively, lay grounds for future research by devising comparative methodologies and survey instruments for policy-oriented research in the three domains studied. All the objectives have been attained.

Achieved benefits

NIEPS has:

- (1) strongly stimulated the co-operation between the national population institutes in Europe;
- (2) increased the analytical power of the research because of the opportunity to observe a higher variance in the determinants of phenomena under investigation;
- (3) lead to expansion of theoretical and empirical knowledge with a European added value since many of the relevant research findings had in the past been published only in a variety of national languages;
- (4) achieved a European added value through better understanding of similarities and differences, and the identification of tools for managing social implications and shaping policies at all levels of governance.

The themes addressed by NIEPS

The NIEPS partners addressed three interconnected key structural demographic changes in European population and family dynamics which are subject of mainstream research in the 11 national population institutes and which can best be documented, explained and managed in a comparative perspective. The three themes that encapsulate the key demographic processes are:

- Ø Gender relations, family-building and patterns of work;
- Ø Ageing, intergenerational solidarity and age-specific vulnerabilities;
- Ø Demographic and cultural specificity and integration of migrants.

The rationale for addressing these specific themes may be explained as follows. In the domain of family formation, European societies witness an accelerated variation in family and household dynamics and at the societal level individual choices regarding childbearing are transposed into below-replacement fertility. Gender relations play a crucial role in the changing family dynamics, in particular for the relationship between family life and labour. Gender, work and family and the policies related to them need to be looked at in an integrated way.

In the domain of migration, many European countries have been or still are experiencing immigration of ethnically quite distinct population groups whose integration or adaptation in many fields of social life raises specific challenges and problems. The demographic features and family structures, the linguistic, educational and occupational characteristics and the cultural identity of those different categories of migrants require multifaceted opportunity enhancing policies, on the one hand. On the other hand, the inefficacy of integration policies gives raise to ethnocentric feelings which may further weaken the position of immigrants on the labour market, leave space to segregation and social exclusion and produce social tensions that cut across the political world, the general public and the immigrant communities themselves.

European societies are ageing, both due to dejuvenation caused by low fertility and increasing life expectancy at higher ages, leading to population greying. The increasing numbers and proportions of the elderly are associated with changes in the composition of the old with respect to improved education, wealth and health, changes which are in sharp contrast with the type of activity and involvement in society. The combined effects of the evolving societal processes, emancipating gender relations and changing family dynamics in general and population ageing raise new challenges for opportunity enhancement and redefinition of the assigned social role for people in the later stages in life. The same holds true for intergenerational equity in terms of solidarity and transfers of resources and services between successive generations.

Methodology of the Network

The activities were implemented through six thematic workshops (two per each topic) and three technical meetings. The general method of work consisted of the organisation of two workshops each lasting 2 days and one intermediate technical meeting, lasting 3 days, for each one of the three themes.

The first thematic workshops undertook a retrospective and comparative analysis of demographic trends and policy actions in the past, and examined alternative strategies to improve policies by identifying best practices. Each workshop was introduced by solicited papers commissioned from scholars either belonging to the co-operating institutes or other renowned researchers and by short presentations from the participating institutes about their work in the field. The presentations were followed by a discussion, introduced by a discussant. The conclusions of the meetings were reflected in the executive reports.

The first workshop of each of the three themes gave, in a comparative European perspective, state-of-the-art overview about the dynamics of the issue, identified areas in need of research development, and addressed the scientific and policy implications of the discussions.

The intermediate technical meeting followed the first workshop and brought together five to 10 experts who undertook an in-depth examination and critical evaluation of theoretical frameworks and research instruments used up to date in the given domain. These experts prepared outlines of proposals for innovative frameworks of future comparative research in the given domain.

The second workshop on each theme focussed on policy implications and discussed possible future co-operative research in Europe. At the second workshop proposed research strategies and instruments developed at the technical meeting were discussed.

The Network's activities consisted of taking stock of databases and research findings generated by the partner organizations, the national population institutes. Those included among others the results of two large scale transnational population and family surveys, Fertility and Family Surveys (FFS) and Population Policy Acceptance Surveys (PPA). Furthermore, data were used from the European Community Household Panel (ECHP), European Value Study and various topical surveys collated by the population institutes and other organizations. The key findings reported and discussed at workshops and technical meetings build on these databases while gaps in knowledge, especially in view of the fact that demographic behavior is an over-determined phenomenon and that knowledge created in a multitude of disciplines, in a variety of institutions and in countries that were not included in the administrative structure of our core network, were partially filled through invited contributions that build on topical studies.

The bundle of empirical data from national or internationally coordinated surveys served as basis for solicited research reports. The authors were invited to include the identification of implications for future research needs in terms of scope and method of approach and social policy in terms of scope and targeting. Research and policy implications were further teased out in general debates. The conclusions of the workshops and technical meetings were submitted to and amended by the NIEPS partners before they were sent to the EC and published.

Scientific results

Gender, family building and work patterns

NIEPS took stock of substantial achievements that have been made in gender equity and equality during the past century. The gender perspective and the empowerment of women are increasingly recognized and pursued as important societal goals. However, the setting up of a facilitating framework by means of integrated policies and measures still varies significantly across Europe. Parallel to the achievements there are clear indicators of persisting gender inequalities at the detriment of women.

The two key domains through which gender inequities and inequalities are manifested relate to work patterns and family dynamics. It appears that for increasing proportions of women the pursuit of one's place in the workforce in terms of timing takes precedence over family formation.

Female labour force participation is increasing, in particular in countries in which it was traditionally low, and the between-country differentials in this respect are decreasing. However, there are still persistent inequalities in the position of men and women in the labour market regarding wages, professional segregation, job security and unemployment risk. Women are less and less willing to drop out of the workforce after childbirth. Different patterns in labour force participation after childbirth can be observed throughout Europe and appear to be associated with both labour and social policies. The increasing female availability on the labour market is also reflected in the increasing female unemployment.

Family formation, both in terms of marriage and childbearing is increasingly postponed towards older ages. Non-marital cohabitation and Living-Apart-Together relations (LAT-relations) are becoming a standard phase at specific stages of the life course of increasing proportions of individuals, more particularly in advanced welfare states. An increasing number of children are born outside marriage mainly as a result of the spreading of new family forms. Fertility remains below long-term generational replacement, albeit with strong between country-differences with lowest levels observed in the Southern European and transition countries.

Combining family life and labour force participation continues to be difficult in most countries, in particular for women. Part-time labour is pursued by large numbers of women in order to reconcile family life and paid labour. Institutional support aimed at correcting market mechanisms continue to be necessary to improve the interaction between gender, family and work, especially with regard to neo-liberal economic developments that are leading to increasing work pressures and 'flexibilization' in favour of employers rather than for the benefit of employees. A typical example is part-time working, which may be experienced as an opportunity by a significant proportion of women in countries where the state has a strong mediating role between market and citizens by both protecting part-time workers in terms of social insurance, working hours and working conditions and providing affordable child-care facilities for working mothers. Part time work, however, remains a 'no-choice-condition' in countries with weak public support to families and is frequently associated with unconventional working hours and poor or no work-related insurance-based social security for women.

Unemployment contributes to the postponement of childbearing as women tend to wait to secure a job before having a child. Structural factors, particularly relating to the labour market, prevent or do not encourage men to invest more time in family life and consolidate the gender divide more particularly regarding family care functions.

Childbearing is becoming increasingly dependent upon the labour market situation, with women seeking to establish their place before having children. There appears to be a marked increase in incompatibility between work and family particularly at the arrival of the third child.

Female labour participation is an increasing and irreversible phenomenon requiring profound societal adaptations and changes in male attitudes and behaviour. The societal (and male)

lagging in adapting to the new roles women are performing often forces women to adopt strategies in the fields of production (part-time work) and reproduction (postponement of births, fewer births) which, ultimately, must result in perpetuating gender inequity on the one hand and below replacement fertility on the other.

Fathers devote more time to childcare, more particularly in the most enjoyable activities like playing and reading. On the whole, however, men have changed less than women who still devote much more time to household tasks, even when full-time employed.

Care for elderly is becoming an important issue in relation to the division of work between women and men. The high demands placed on families in the context of weak public support are a cause for dissatisfaction and general stress, more particularly among women, since much of this care provision comes from a gender-based division of labour both within the family and the labour market.

The societal lagging in adapting to the new roles women have adopted in the workforce forced women to adopt a strategy of postponing births, reducing the number of children and/or reducing the number of hours in paid work. The incompatibility largely experienced by women between family duties and work can be considered as one of the major causes of below replacement fertility levels in Europe. However, the recent strong fertility decline in the transition countries is to be interpreted also as a behavioural adaptation to a general societal transitional crisis situation.

Demographic and cultural specificity and integration of migrants

The foreign population in Europe forms, on average, only 4 percent of the total population. However, proportions of foreigners vary considerably from country to country, although they have been rising generally. The greater part of the foreign born population is resident in Western Europe. During the last decade, the total foreign stock in Western Europe has increased by 35 percent.

In Eastern Europe, flows and stocks remain relatively small. The fall of the Iron Curtain promoted an increase in migration flows within and from countries of Central and Eastern Europe, but numbers are modest, although probably underestimated. In this area there is evidence of regional self-containment.

Trends in naturalisation are significant and numbers are going upward, indicating that the real total stock of citizens of foreign origin in Europe is considerably above the recorded foreign population. The high, though lowering fertility of non-European immigrants also contributes to the increase of the proportion of second-generation migrants.

The majority of immigrants are from European origin, but there might be an increasing inflow from outside Europe, also via undocumented immigration. There is a considerable diversity of foreign migrant origins and a complex set of geographical locations and histories. Recent trends reinforce this diversity. Due to the combination of a variety of reasons some migrant subgroups are becoming more visible.

There are several changes in the type of migration towards Europe: shifts from documented labour migration towards family reunification and family formation; growth in numbers of refugees and asylum seekers; shifts from legal towards illegal migration; shifts from unqualified towards qualified migrants.

Economic demands for immigration in Western Europe concern very specific and qualified occupational sectors (IT, health services, some forms of engineering). In contrast, existing immigrants feature prominently in the unemployment figures or have, more particularly in the case of women, a lower labour participation. There are clearly differences in interests and benefits of labour migration for private firms who can take up short term engagements and

social needs for long-term strategies of social and cultural integration of immigration and adaptations of a society as a whole.

Integration of immigrants relates to the inclusion of new populations into existing social structures and the quality and manner in which these populations are connected to the existing system of socio-economic, legal and cultural relations. Four forms of integration were considered: structural integration, social integration, cultural integration, and identificational integration. In this context it appears that the concept of foreigners has become too narrow and both research and policies should at least look at those foreign born and possibly also at the populations with an immigrant background.

With respect to integration of migrants, the following issues can be highlighted. First it appears that various indicators of demographic behaviour of migrants (nuptiality, fertility, morbidity and mortality, gender differences in morbidity and mortality) can be used as indicators of the degree of integration. With respect to benefits of demographic adaptations in terms of gender equality improvement of health conditions there are also indications that, in some cases, immigrants contribute to speeding up the demographic modernisation in their country of origin. With respect to social integration it appears also that second generation migrants are sometimes socially worse off than their parent generation, notably they are at higher risk of unemployment. This is a salient indicator of a failed integration policy.

Ageing, intergenerational solidarity and age-specific vulnerabilities

Population ageing is a universal phenomenon in Europe, but large differences still exist in its extent, pace and relative impact of its various determinants. Its speed and intensity are subjects of concern, particularly in countries with a strong dejuvenation process due to extremely low fertility levels. Although a more balanced view on population and individual ageing is developing, ageism and age discrimination are far from being eliminated.

As far as concerns the determinants of population ageing, it is clear that both low fertility (i.e. below replacement fertility) and increasing life expectancy at higher ages are contributing to the population ageing process.

Gender differences in mortality result in significantly larger ageing prospects for women than for men. There is a salient, and in some respects even an increasing diversity in biological, demographic, social and economic characteristics within the older adult population: these concern not only differences between women and men, but also between young-old and old-old, between singles and people living in couples, between poor and rich. The compression of morbidity at very high ages enhances the variance in the aged population, improving the health of the younger old and worsening that of the very old.

Age at retirement evolves in the opposite direction of the improving health and educational situation of older people. Life expectancy has been increasing throughout the 20th century and the causes of death have largely shifted from infectious disease to senescent deterioration. As a consequence younger elderly people aged between 65 and 75 years reach today the third age in relatively good health and the bulk of elderly live under conditions of income security. The health and socio-economic profile of the oldest old is less favourable as a consequence of the individual ageing process and disparities in life chances of the oldest generations.

Statutory age at retirement has, meanwhile, remained unchanged in most European countries while *de facto* age at retirement has even been declining for men throughout the 1970s, 1980s and 1990s. Effective age at retirement has been increasing for women although it is still considerably below statutory retirement age and economic inactivity is still very high among elderly women in many European countries.

The situation in many Eastern European countries is of particular concern due to the negative side-effects of the transition, where the aged were hit very badly by the socio-economic

changes: increased unemployment and forced earlier retirement, decreasing public support for vital services and goods, loss of savings due to inflation, low pensions, etc., all resulting in higher dependency ratios and higher burden placed on families.

With respect to the vulnerability, risks and resources of elderly, not only vulnerabilities and risks of high age, but also positive strengths and resources of the elderly should be considered in research and policy. Frailty risks are especially salient where several individual risk factors, such as very high age, bad physical or mental health, low capacity for autonomy, living alone or poor social ties, and low income, cumulate.

The labour force participation of older people was discussed within the larger framework of active ageing. Special attention was paid to the health dimension at higher age. It was argued that healthy ageing has to be considered in a life course perspective. The life course approach to ageing first of all recognises that older people are not a homogeneous group and that individual diversity tends to increase rather than decrease with age. Secondly, it acknowledges that interventions creating support environments and fostering healthy choices are important at all stages of the life course and lead to better health in later life. It was, however, also pointed out that in addition to life-course-linked behavioural processes, biological features and cultural, socio-economic and environmental living conditions and historical processes play also a considerable role in the emergence and development of disease patterns among older people. Hence, healthy ageing involves both individual and societal responsibilities.

Recent trends in the relation between life expectancy (LE) and disability-free life expectancy (DFLE) are still somewhat contradictory. In general, however, whereas the increase in LE at age 65 appears to be universal and regular in the low mortality countries, DFLE – all disability levels combined – appears to have stagnated. In recent years the increase in life expectancy seems to be accompanied by a pandemic of light and moderate, but not of severe disabilities. People with lower risk behaviours, higher educational levels and history of tertiary sector occupations experience less years of disability before death. It is expected that such features are conducive to a further compression of disability.

Policy implications

The Network systematically looked at the research and social policy implications of its findings.

Research policy

As far as concerns research policy, it was observed that the themes addressed by NIEPS are increasingly subject to research in various disciplines but usually in a fragmented manner as separate topics and/or lack multidisciplinary and international comparative approach. Likewise, the effects of existing policy measures and the needs for new forms of integrated public support remain under-researched areas.

There is a clear need for an all-European synergy in view of developing comparative research projects based on micro level data collection and other research instruments. There is a clear need to dialog and cooperate in the development of concepts and tools for analysis as well as for overcoming fragmentation of research both in the countries and in particular at transnational level. Lack of adequate data to address the issues at stake are particularly felt in transition countries. Many of the ongoing societal transformations as they affect families are not properly documented. Thus the development of informed policies based on the analyses of needs and preferences is lagging behind.

For each of the themes studied a number of concrete research topics are suggested on which co-operative and comparative work in Europe should be launched or extended.

In general, all three main themes – gender, family and work; ageing and intergenerational solidarity; integration of migrants -, and their interrelations, need to be more intensively studied in a life course perspective, and by means of multi- and interdisciplinary approaches.

NIEPS identified also a number of theoretical and methodological challenges that require a more in-depth approach in future research on population and family dynamics, such as: more theory-driven research; the improvement of the methodology of comparative research; the recording and analysis by means of event history methods, the recording of larger numbers and more diversified population subgroups; new types of co-variables, among others in the domains of values and norms and political elements, in survey and other research; the development of comparable indicators and co-ordinated data collection and analysis at the all-European level.

For all of the three main NIEPS themes it was suggested to organise innovative comparative all-European representative sample surveys. These new surveys should be conceived in an interdisciplinary way and hence should not only involve population institutes, but also institutes specialised in other scientific fields.

It was finally repeatedly stressed that the population and family dynamics and the effects of population and family related policies should not only be followed and assessed from a short-term, but also from a long-term perspective as they affect successive generations.

Social policy implications

NIEPS identified, for each of the three themes, a large number of social policy implications. Most of them are, obviously, theme-specific. Nevertheless, also a few general implications were stressed, such as the need to integrate population and family related policies in other policy domains, the need to develop policies that duly take into account processes that affect individuals over the entire life course, and the need to envisage long-term, intergenerationally oriented policies. Major policy relevant issues are summarised below.

Gender relations, family building and work patterns

Lack of clarity on population- and family-related policy aims

In terms of population policy as statement of intent and practice we observe in various countries that differences in the ideological conceptualisation of the roles of families and competing interests of the key socio-economic and political actors have as consequence a lack of consensus on population and family-related policies in general at the national level. Population policy goals are rarely, if at all, explicit as there is no consensus on ways to tackle the macro-level phenomena such as population dejuvenation resulting from below replacement fertility levels and ways work patterns can be modelled to accommodate families and promote gender equity.

Lack of family-friendly climate

European societies are characterised by the existence of a diversity in values and attitudes with respect to family building. In the domain of partnership traditional attitudes concerning gender roles and power relations, gender based abilities and remaining forms of gender discrimination in the labour force regarding employment selection, wages, occupational positions and alike are still strongly present and impair both the conceptualisation and implementation of modern family- and population-friendly policies.

Two findings are relevant to reproductive behaviour. On the one hand, women appear to want more children than they eventually have. On the other hand, even if the majority of women achieved the number of children they wanted, in most countries in the longer term the

generations would not be replaced. This is because a substantial proportion of three and four-child families are required to compensate for those who for one reason or another remain childless or have only one child. Research shows that under the prevailing economic and social system, those wishing to have a large family are a very small minority.

Macro-level differentials

In recent years the eastern European countries underwent *in vivo* social experiment conditions. The demographic changes associated with the transition to market economy illustrate what happened at the population level when one social protection system was dismantled and adaptations had to be made by a broad population base to the weakening of public provisions to families and of the welfare system in general. The most striking demographic consequences have been a sharp fertility decline to very low levels in all transition countries and a remarkable decrease of life expectancy, and increase of mortality among the working age population, particularly among men, in some transition countries.

In the Nordic countries, by contrast, there is strong evidence that reinforcement and fine tuning of the family friendly policies and measures, more in particular with respect to the position of women, as part of a risk-reducing universalistic welfare model have contributed to stabilizing fertility levels at levels that are only slightly lower than replacement levels.

Much has been said in the policy discourse about the benefits of 'familism' and the existence of stronger family support in southern and eastern European countries than in western and northern Europe. As a consequence of this, it is often concluded that the Mediterranean countries and countries in transition are more likely to rely on family support and embrace family-care solutions in their policies for the needy. Our research shows that this support may largely be a result of a 'no-choice situation' due to the weakness of public support in terms of scope, level of public transfers and targeting.

Importance of general well-defined and integrated social policies

General well-defined and integrated social policies appear to alleviate the incompatibility between labour force participation and family life. Public policies in the field of childcare facilities further appear to contribute to reconciling labour and family life. The same holds for work time flexibility and variability, adapted to family needs, and greater job stability for both men and women.

Increasing work stress

Heightened stress at work, precariousness of jobs, unemployment, and earlier forced retirement are observed. These phenomena, in combination with the ever-increasing quality of life and consumption expectations make people more reluctant to assume long-term risks and responsibilities of child rearing. Institutional supports aimed at correcting market mechanisms are considered to remain necessary to improve gender-family-work interactions, especially with respect to the neo-liberal economic developments leading to increasing work pressures and flexibilisation in favour of the market.

Persisting gender inequality in combining family and work

Improvement of the position of women in the labour market and family-friendly policies and measures facilitate childrearing and contribute to enabling women to approach more closely the number of children they wish. A strong gender perspective in family policy-making appears to be indispensable, including policies that concentrate on changing attitudes and behaviour of men with respect to household and childcaring tasks. Between-country differences in fertility levels associated with differences in policies suggest that measures

focusing on women's emancipation and gender equality are associated with higher fertility levels (the striking differences in the fertility levels and gender policies between the Scandinavian countries and the Mediterranean countries suggest that measures aimed at fostering gender equality in matters of labour and family life positively influenced fertility, even when this was not the primary aim of the policy). Family and fertility policies (family planning policies, reproductive health policies, social policies favouring childbearing and rearing) should draw lessons from this experience.

Universal general schemes versus targeted policies

Universalistic regimes appear to provide a broad range of advantages over targeted measures. Policy measures that intend to produce population effects have to reach a broad population base. By creating a climate of protection by guaranteeing social rights before material deprivation occurs, significant numbers of women can be encouraged to take the risks of having and raising more children than they currently do. Universalistic policies contribute to the greater democratisation in society with respect to parenthood. Average, double-income families see their opportunities enhanced and quality of life improved, as do lone working mothers. The currently operating more universal general schemes appear to work. In advanced welfare states the majority of women can realise the desired family size without having to opt out of the labour market. This opportunity enhancement for free choice regarding the timing and number of births is transposed at the societal level into fertility levels that are close to generational replacement and lower levels of dissatisfaction of people with their life chances.

Protection against long-term risks

Social protection systems in most countries lack effective ways of spreading over the entire life-course the risks associated with competition in the labour market, the low-income/high needs nexus, and high demands on time in the workplace and family. The incompatibility between family life and paid work is currently predominantly concentrated in the early stages of family building. Stress is particularly high for young adults during the early stages of family formation, as well as for families with dependent children in general. Resources and free-from work time need to be redistributed in a life course perspective in a more family friendly way.

The awareness of risks is an important component of responsibility sharing between the individual and the state. Many people do not appear to be prepared to tackle the life-course risks which they may have to face, especially in view of the high prevalence of divorce, single parenthood and the increasing probability that large proportions of people, especially elderly women, will spend a considerable number of years living alone.

The current toolbox of family policies might finally be insufficient to resolve the dilemmas facing individual women and men, on the one hand, and modern societies, on the other, for pursuing goals with respect to genuine gender equity and intergenerational continuity. To reconcile the peak years of family formation with competition in the labour market, the entire life course perspective of employment and retirement might have to be rethought so as to give more free time and resources to young families and to create conditions for active ageing that entails also the option of working at higher ages.

Demographic and cultural specificity and integration of migrants

Lack of consensus on migration questions

A major difficulty for the development of migration policies lies in the profound differences in views regarding benefits and costs of immigration. There is no

consistent view about ways to manage migration flows and facilitate social and cultural integration of immigrants. Divergent strategies are often drawn from fragmented empirical evidence but also often build on non-explicitly expressed ethical or ideological convictions. Whatever option with respect to migration countries may chose, the development of a coherent and comprehensive implementation strategy to manage migration flows is necessary. In view of the free movement of people within the European Union some aspects of migration policies and integration measures should evidently be designed and coordinated at the European level.

Replacement migration is not a solution for population ageing

Demographic replacement migration is not a solution for population ageing in a long-term perspective. Ageing requires a basket of measures of which migration might be one of the minor components. Possible shortages on the labour market should first be addressed by valuing, mobilising and integrating the existing reserves of manpower of foreign origin, confronted with higher than national average rates of unemployment, instead of enabling enterprises to recruit labour at no cost for themselves and shifting to the society the cost of unemployment at times of economic restructuring of their firms.

Need for adequate integration policies

Migration flows need to be accompanied by integration policies related to the different aspects, namely structural, social, cultural and identificational integration of migrants. Integration is a process involving both immigrants and natives. Attitudes related to racism, xenophobia, and ethnocentrism, both among the immigrants and the domestics need to be combated.

There are indications that integration policies which equip immigrants with skills and knowledge that facilitate social mobility may be more conducive to successful social participation than so-called multicultural approaches that encourage immigrants to maintain their original in-group characteristics, particularly when they also entail the gender divide, and by default restrict options for integration and social mobility in their new society. The maintenance of traditional gender inequality among some immigrant groups is discriminatory for immigrant women and the immigrant group as a whole. Equality and equity principles that immigrant men rightly claim for themselves, should not only be seen in the context of between group relations (migrants and nationals) but also within immigrant groups (men and women).

Ageing, intergenerational solidarity, and age-specific vulnerabilities

Active ageing

A new conceptual approach to population ageing and its related policies, adapted to the prevailing demographic regime, is necessary. The aged should no longer be defined on the basis of a static chronological age, but on the basis of a dynamic ageing concept, taking into account the total age composition of the population, its social and biological functionality, validity and diversity. The formal and *de facto* age at retirement should be increased via appropriate stimulating measures, albeit in a flexible and variable way, taking into account intra- and inter-individual variability with respect to desire, needs and abilities.

Adapting the social security system

Obviously the various components of the social security system (and not only the pension system) will have to be adapted, more particularly in a long-term perspective. Radical reforms in the direction of restrictions of acquired rights may not be indispensable but fine-tuning adaptations in multiple domains might suffice to preserve the European social security model.

The PAYG system can be improved by relatively small adaptations like modification of the minimum age at retirement, activation of part of the inactive working age population, adaptations of contribution rates, and a multi-pillar approach to social protection. The traditional pension systems in Europe should be reformed and adapted to the new demographic regime. They should be fair and robust with respect to the further expected increase of longevity. Pension reforms should be part of an integrated policy together with population policies and welfare and labour market reforms.

Compression of morbidity

Last but not least, all policy efforts aimed at or resulting in a further extension of life expectancy should focus on having that extension free of severe disabilities and need to strive at a further compression of morbidity in the life course.

Strategies for an integrated population and family policy approach

Much of the research and policy making on the three major NIEPS themes occurs in a secluded way. These themes are, however, in several respects, mutually interrelated in complex ways. Hence, there is a need for a more integrated approach, both in research and policy making.

In the domain of scientific research several strategies can be applied with a view to promote an integrated approach in the fields of family dynamics, integration of migrants and population ageing. The conceptualisation of research needs to consider simultaneously the major issues dealt with in the NIEPS project and to look at their interrelations and interdependencies. Research units need to be large enough or need to bundle and co-ordinate their research efforts and potentials, within and between institutions, within and between countries, to be able to deal with several family and population research issues at the same time. Also it is necessary to stimulate and organise multi- and interdisciplinary research. Complex societal phenomena and problems such as discussed in the NIEPS project, require precisely discipline-transcending co-operative research.

Population and family related policies in the domains of family building, migration and population ageing should be conceived in a comprehensive and integrated way. Policies regarding gender, family, labour, migrants, elderly are often the responsibility of different ministers and administrative departments, the conceptual integration and co-ordinated implementation of which is weak, if not completely absent.

Our pluralistic societies house ideologically quite different views on family and population matters. A coherent and generally supported integrated view on a present-day population-related policy is virtually absent in all European countries. Yet needs for public support are extensively documented in population research and clearly articulated by the population. Also benefits for the society as a whole of universalistic coverage of social protection that fosters a climate of security of individuals and families in face of multiple risks are evident.

It is necessary to consider research and policy making in the domains of gender relations, family dynamics and work patterns simultaneously and in their mutual interrelations. Gender relations, task divisions and co-operation in the domains of family building, household roles and out-of-the-house labour probably form one of the most important factors in reconciling family life and work and in the future redress of fertility close to the intergenerational replacement level. More in particular fundamental changes in the path of the life course might become necessary to resolve the fundamental dilemma modern societies are facing in the interrelations between gender, fertility and work in a life course perspective.

The question of the integration of migrants coming from culturally more distant countries not only evokes the same problems but raises even more the preceding question of the basic gender equality, more particularly towards women and girls.

The important ageing wave which the industrialised countries can expect in the second quarter of this century will require a revision and adaptation of past research strategies and social policies. For this complex problem there seems to be no simple or quick policy solution. A well-designed mix of welfare measures, combining public provisions with community-, family- and self-help might be the obvious path to take.

The balanced approach that takes into account societal, family and individual needs does not counter-pose family versus public responsibility but promotes varying degrees of choice for individuals to use both. This of course implies the existence of well-developed chains of publicly funded or co-funded services that are made available to individuals and families.

A largely unexplored path of reasoning and policy design with respect to the care of the aged is to reconsider this problem in a total life course perspective, thereby taking into account intergenerational equity. A life course perspective might also give individuals a much greater involvement and say in the way they want to spend both their own resources and public resources in the different stages of their lives.

A prerequisite for the development of a more integrated population-related policy might reside in the development of a more integrated and comprehensive family and population research. Since policies are more and more knowledge-based, vanguard research ideas and results might be an inspiring conceptual source for policy making.

Obviously, the major change in approach will have to come from policy-making quarters themselves. Conceptually vanguard policy directives of European political bodies – European Commission, European Parliament, Council of Europe – and policy relevant population-related documents of other intergovernmental bodies such as OECD and the United Nations might have a stimulating effect.

Dissemination during the EU Contract

NIEPS Workshop Proceedings

- Kucerová O., T. Kucera (eds.) (2003), *Gender Relations, Family and Work*. Solicited Papers of the First NIEPS Workshop, Zharadsky Castle, Czech Republic, 15-16 September 2000. Prague: DemoArt 2003.
- Jacobs, T., L.B. Knudsen, J.A.F. Cordón, G. Frinking, T. Willemsen, R. Crompton (2002), *The Impact of Policies on Family Formation and on Division of Labour*. Centrum voor Bevolkings- en Gezinsstudie in co-operation with the Network for Integrated European Population Studies (NIEPS). CBGS-Werkdocument, 2002/2. Brussel: Centrum voor Bevolkings- en Gezinsstudie.
- Höhn, C. (ed.) (2001), Demographic and Cultural Specificity and Integration of Migrants. 1st Workshop organised by the Federal Institute for Population Research in Co-operation with the Network for Integrated European Population Studies (NIEPS), 10-12 November 2000, Bingen, Germany. *Materialien zur Bevölkerungswissenschaft, Heft 103*. Wiesbaden: Bundesinstitut für Bevölkerungsforschung.
- Söderling, I. (ed.) (2003), *Workshop 5. Demographic and Cultural Specificity and the Integration of Migrants*. March 21-23, 2002, Helsinki, Finland. Population Research Institute/Vaestoliitto Working Papers E/16. Helsinki: Population Research Institute/Vaestoliitto.
- Gesano, G., C. Höhn, (eds.) (2002), *Ageing, Intergenerational Solidarity and Age-specific Vulnerabilities. Workshop organised by the IRP-CNR – Institute for Population Research and National Council for Research in collaboration with NIEPS – Network for Integrated European Population Studies, Rome, 20-21 April 2001*. *Materialien zur Bevölkerungswissenschaft, Heft 103b*. Wiesbaden: Bundesinstitut für Bevölkerungsforschung.
- Dykstra, P. (ed.) (2003), *Proceedings of the Second NIEPS Workshop on Ageing, Intergenerational Solidarity and Age-specific Vulnerabilities, The Hague, 27-28 September 2002*. NIDI Report No. 65. The Hague: NIDI.

NIEPS Monograph

- Avramov, D., R.L. Cliquet (2003), *Critical Population Issues in Europe: Implications for Integrated Policies on Gender, Migration and Ageing*. Brussels: NIEPS (forthcoming).

Follow-up Dissemination

The publication of papers in journals and monographs, presentations at scientific conferences and interaction with policy makers continue far beyond the lifespan of the EU funded project. Examples of scheduled activities in 2003 are given in the annex of the full version of the final report.

2. BACKGROUND AND OBJECTIVES OF THE PROJECT

National population institutes in Europe have as a specific mandate to undertake independently scientific research on population issues with a view of informing and advising the government and public authorities on the policy implications of population dynamics. Those institutes are governmental bodies or governmentally financed institutions whose mission consists of systematic monitoring and analyses of population dynamics and the study of implications for society and policy making. Some of them also study the impact of policies. They distinguish themselves from academic research institutes by their policy oriented population research and by their advisory role to governments and public administrations on the policy implications of population dynamics.

Either the mission statements, or the research programmes of these institutes refer to the study of population structures and trends, their background and consequences, and their policy implications. All of them study population issues in a broad pluridisciplinary sense of the word and not in a narrowly defined demographic or statistical sense. All of those institutes have also as task to inform the public, mainly by means of publications, on the results of scientific research in their fields. The mission statements of these institutes also refer, in one or another way, to their role in international co-operative population activities and population policy related matters.

The national population institutes in Europe make use of existing statistical data such as vital registration data, but usually also undertake in-depth surveys on specific population and social issues. They have specialised staff and extensive expertise in policy-oriented analysis of population dynamics and its interactions with socio-economic and other societal processes in their respective countries.

The societal and policy oriented scientific mission of the national population institutes, however, does not mean that they have normative or prescriptive tasks. Therefore, when dealing with population related policy issues, they try to assess the societal consequences of various demographic developments or approach policy issues in alternative or multiple options, thus guaranteeing their scientific impartiality and objectivity.

While there is an open access to demographic literature that cuts across national borders, there is a striking lack of an institutional framework that would enhance exchange evaluation of best practice at the European level and promote a dialogue about the interaction between demography and policy.

Network for Integrated European Population Studies (NIEPS)

The Network for Integrated European Population Studies (NIEPS) brought together 11 national population institutions from European Union and transition countries that have a similar mission. These national population institutes or centres have as a specific mandate to undertake scientific research on population issues and are frequently called to inform and advise the government and public authorities on the policy implications of population dynamics. Those institutes are governmental bodies or governmentally financed institutions whose mission consists of systematic monitoring and analyses of population dynamics and the study of implications for society and policy making.

NIEPS set out to promote transnational co-operation in comparative policy-oriented research and policy impact analysis in the domains of (1) gender and family development, (2) ageing and solidarity, and (3) integration of migrants. The Network was launched in April 2000.

The NIEPS partners are:

- Ø Population and Family Study Centre (CBGS), Belgium (Co-ordinator);
- Ø Bundesinstitut für Bevölkerungsforschung (BiB), Germany;
- Ø Netherlands Interdisciplinary Demographic Institute (NIDI), the Netherlands;
- Ø Istituto di Ricerche sulla Popolazione (IRP), Italy
- Ø Population Research Institute (PRI), Finland ;
- Ø Department of Demography and Geodemography (KDGD), Czeck Republic;
- Ø Institut für Demographie (IFD), Austria;
- Ø Estonian Interuniversity Population Research Centre (EKDK), Estonia
- Ø Demographic Research Institute (DRI), Hungary;
- Ø Centre of Demography (CDL), Latvia;
- Ø Institute of Statistics and Demography (ISD), Poland.

The Network was assisted by two independent consultants, Dragana Avramov and Robert Cliquet.

Objectives

The general and main objective of the Network for Integrated Population Studies (NIEPS) was to create an all-European platform that would promote a dialogue on policy relevant interactive domains of population and family dynamics on the one hand and socio-economic processes on the other.

NIEPS had two specific objectives which include both a retrospective and prospective dimension: (1) on the basis of a retrospective analysis of demographic trends and policy actions in the three identified thematic domains, examine prospectively alternative strategies to improve policies by identifying best practices; (2) undertake, retrospectively and on a comparative basis, an in-depth examination and evaluation of survey instruments used in countries under consideration in the three domains in order to, prospectively, lay grounds for future research by devising comparative methodologies and survey instruments for policy-oriented research in the three domains studied. . All the objectives have been attained.

The different objectives were intended to show interdependencies in various ways: the establishment of a transnational network would facilitate and stimulate the organisation of comparative research both in the domains of the development of research instruments and policy impact analysis; the simultaneous approach of research strategies and policy implications would be conducive to develop research instruments that are more closely linked to policy aspects; the treatment of the three major themes – gender relations, ageing, and

migrants – would allow to consider their common grounds and mutual interdependencies and lead to integrated policies.

Achieved Benefits

NIEPS has strongly stimulated the co-operation between the national population institutes in Europe. Given the similarity of population trends and their interaction with socio-economic and cultural developments in most European countries, the preoccupations and research programmes of the national population institutes show many points of common interest. Joining forces and resources leads to the reinforcement of their programmes and activities.

The setting up of common programmes, moreover, increases the analytical power of the research because of the opportunity to observe a higher variance in the determinants of phenomena under investigation. Common programmes to be developed by several national research centres lead to expansion of theoretical and empirical knowledge since many research findings reported through NIEPS activities were available only in the national language (some 10 different languages) become accessible to partners by using English as a common language. This synergism is expected to further enhance scientific progress.

The achieved benefits also entail a European value added through better understanding of similarities and differences, and the identification of tools for managing social implications and shaping policies at all levels of governance. This was done by networking to develop scientific indicators and tools that will enable policy makers to make informed choices. A major benefit also derives from the fact that citizens will be involved in shaping policies which affect the quality of life by means of surveys in which individuals are asked to provide information on their family history and family building process, education, and labour force participation, and are directly asked to express their concerns, opinions and expectations with respect to those domains. An international comparative approach of the impact of various policies on identical demographic developments enhances considerably the power of policy impact analysis.

NIEPS strongly concentrated on the comparison of the policy implications of the current knowledge and of the future research orientation. National policy-makers are interested to know whether a certain demographic issue is unique to their country or prevalent also in other countries.

While the core of the network consisted of 11 national population institutes in Europe, the network solicited participation of INED in France, university research institutes or demographic departments of statistical institutes in EU-countries which have no centralised national population institute, namely Denmark, Greece, Ireland, Luxembourg, Norway, Portugal, Spain, Sweden, and UK, intergovernmental agencies as participants to specific network activities (EUROSTAT, Luxembourg; European Population Committee (CAHP) of the Council of Europe, Strasbourg; OECD, Paris; UN-ECE-Population Activities Unit, Geneva) and international non-governmental organisations.

The Themes addressed by NIEPS

Population research moved from descriptive to causal analysis and in recent decades more and more also from macro- to micro-level analysis. At the same time the need emerged to look more closely at specific population groups, to examine the policy implications and policy impact, and to compare trends and policies in an international perspective in order to lay grounds for future national research which will be funded from national resources, but results of which will be comparable at the European level and suitable for common European action whenever pertinent and desirable.

The NIEPS partners addressed three interconnected key structural demographic changes in European population and family dynamics which are subject of mainstream research in the 11 national population institutes and which can best be documented, explained and managed in a comparative perspective. The three themes that encapsulate the key demographic processes are:

- Ø Gender relations, family-building and patterns of work;
- Ø Ageing, intergenerational solidarity and age-specific vulnerabilities;
- Ø Demographic and cultural specificity and integration of migrants.

Those three themes are certainly not the only topics which are being studied by national population institutes or are considered as the only important population problems for the future, but they undoubtedly belong to the major current research and policy-relevant issues national population institutes are dealing with and which deserve international co-operation and comparison, more particularly in the field of survey undertaking. Those three themes are also in several ways interconnected and deserve to be looked at in an integrated way, especially from a policy point of view. The rationale for addressing these specific themes may be explained as follows.

Gender relations, family-building and work patterns

In the domain of family formation, European societies witness an accelerated variation in family and household types. Marriages are postponed or replaced by other forms of unions. Both are increasingly ending in separation or divorce, resulting in growing numbers of one-parent families and reconstituted families. Childbearing is postponed and less children are born. At the societal level individual choices regarding childbearing are transposed into below-replacement fertility. The changing family dynamics is related to and has implications for gender relations, within as well as outside the family, and in particular for the relationship between family life and labour.

Contrary to what is sometimes believed, female employment is not in a simple or straightforward way related to low fertility or is to be considered as the major cause of below replacement fertility, but gender relations interact in complex ways with work patterns and family building. Virtually every current policy statement on the family refers to the existing partial incompatibility between family life and work life and also gender related statements often link family building to other life style options, but seldom are gender, work and family and the policies related to them looked at in an integrated way. This is precisely what NIEPS did.

Demographic and cultural specificity and integration of migrants

Many European countries have been or still are experiencing immigration of ethnically quite distinct population groups whose integration or adaptation in many fields of social life raises specific challenges and problems. While countries in transition very often are still transit countries for migrants, EU countries have a longer tradition in hosting migrants with the aim of integrating legally resident migrants and their family members. Some of these migrants arrived on the basis of recruitment for labour, others are returning ethnic minorities, still others are descendants from former colonies. In most cases, migration entails at some stage also family reunification. Finally, there are asylum seekers and refugees from countries where there is civil or international war, totalitarian regimes, economic hardship or environmental catastrophies. Also illegal migration to Europe has increased during the 1990s. This type of migration is part of the labour force migration associated with gray economy and seasonal migration.

The demographic features and family structures, the linguistic, educational and occupational characteristics and the cultural identity of those different categories of migrants on the one hand require multifaceted opportunity enhancing policies. On the other hand the inefficacy of

integration policies gives rise to ethnocentric feelings which may weaken the position of immigrants on the labour market, leave space to segregation and social exclusion and produce social tensions that cut across the political world, the public opinion and the immigrant communities themselves.

The increasing numbers of people of non-European origin and different religious practice who are concentrated in metropolitan areas, who are insufficiently integrated particularly in the labour market have raised concern in several quarters. The political life has been marked by the increasing presence of extreme right-wing parties, the public opinion by increasing xenophobic and racist attitudes, the immigrant communities themselves by increasing feelings of dissatisfaction, disappointment and unrest, but also increasing signs of ethnocentrism and religious fundamentalism.

It cannot come as a surprise that the national population institutes want or are called upon to investigate more thoroughly the problems of the demographic and cultural specificity of migrants and their degree and way of integration in their host societies.

Ageing, intergenerational solidarity and age-specific vulnerabilities

Life expectancy is further increasing, also at higher ages. The combined effect of fertility decline, leading to dejuvenation, and increasing life expectancy at higher ages, leading to population greying, accumulate in a substantial population ageing. The increasing numbers and proportions of the elderly are associated with changes in the composition of the old: on the one hand the younger elderly are healthier, at least functionally, and better educated, on the other hand degenerative diseases concentrate among the very old, where the increasing life expectancy is often associated with a decreasing quality of life of the oldest old. Excess male mortality also results in strongly disbalanced sex ratios at higher ages.

Whereas life expectancy increases and at least the majority of the younger old are in good health, the average age at retirement decreases and many younger old are socially inactivated, if not excluded. The combined effects of the evolving societal processes, emancipating gender relations and changing family dynamics in general and population ageing raise new problems and challenges in the fields of the social role of people in the later stages in life, and intergenerational equity in terms of solidarity and transfers of resources and services between successive generations. It is one of the major, highly policy-relevant research domains national population institutes are facing and to which NIEPS contributed via a comparative and integrated perspective.

3. SCIENTIFIC DESCRIPTION OF THE PROJECT RESULTS AND METHODOLOGY

Methodology of the Network

The activities were implemented through six thematic workshops and three technical meetings. The general method of work consisted of the organisation of two workshops per theme, each lasting 2 days, and one intermediate technical meeting per theme, each lasting 3 days.

Each thematic workshop had 30 to 40 participants, including authors of invited papers, invited discussants and other experts, the author of the executive report, representatives of public authorities and civil society, and staff members of the organising institute. The technical meetings brought together six to eight experts from the NIEPS institutions to work out recommendations for research frameworks and instruments for the prospective research.

The first thematic workshop for each topic undertook a retrospective and comparative analysis of demographic trends and policy actions in the past. Each workshop was introduced by solicited papers commissioned from scholars either belonging to the co-operating institutes or other renowned researchers and by short presentations from the participating institutes about their work in the field. The presentations were followed by a discussion, introduced by a discussant. The conclusions of the meetings were reflected in the executive reports. The first workshop of each of the three themes gave, in a comparative European perspective, state-of-the-art overview about the dynamics of the issue, identified areas in need of research development, and addressed the scientific and policy implications of the discussions.

The intermediate technical meeting followed the first workshop and brought together five to 10 experts who undertook an in-depth examination and critical evaluation of theoretical frameworks and research instruments used up to date in the given domain. These experts prepared outlines of proposals for innovative frameworks of future comparative research in the given domain.

The second workshop on each theme focussed on policy implications and discussed possible future co-operative research in Europe. At the second workshop proposed research strategies and instruments developed at the technical meeting were discussed.

The Network's activities consisted of taking stock of databases and research findings generated by the partner organizations, the national population institutes. Those included among others the results of two large-scale transnational population and family surveys, Fertility and Family Surveys (FFS) and Population Policy Acceptance Surveys (PPA). Furthermore, data were used from the European Community Household Panel (ECHP), European Value Study and various topical surveys collated by the population institutes and other organizations. The key findings reported and discussed at workshops and technical meetings build on these databases while gaps in knowledge, especially in view of the fact that demographic behavior is an over-determined phenomenon and that knowledge created in a multitude of disciplines, in a variety of institutions and in countries that were not included in the administrative structure of our core network, were partially filled through invited contributions that build on topical studies.

The bundle of empirical data from national or internationally coordinated surveys served as basis for solicited research reports. The authors were invited to include the identification of implications for future research needs in terms of scope and method of approach and social policy in terms of scope and targeting. Research and policy implications were further teased out in general debates. The conclusions of the workshops and technical meetings were

submitted to and amended by the NIEPS partners before they were sent to the EC and published.

Scientific description of the project results

Gender-relations, family building and patterns of work

The 1st Workshop on Gender, Family and Work

This Workshop was organised by the Department of Demography and Geodemography of the Charles University in Prague and was held in Zahradky Castle, Czech Republic, on 15-16 September 2000.

The Workshop had as main objectives to concentrate on the family building process and the gender dynamics of family life and work. The workshop was also to identify areas in need of research development, and to address the scientific and policy implications of the Workshop discussions. Finally, the Workshop was expected to formulate guidelines for the forthcoming Technical Meeting on the development of further research instrumentarium in the field.

The discussions at the Workshop were first introduced by four solicited presentations, comments by a discussant and presentations on the theme-specific experiences and activities of the partner institutions. The four solicited papers dealt with:

- Childbearing in Marriage and Outside: From Unity to Gender Divide? (An-Magritt Jensen, Norwegian University of Science and Technology, Trondheim)
- Gender and the Welfare State (Gerda Neyer, Institute for Demography, Vienna)
- Family Responsibilities and Gender Discrimination on the Labour Market (Ariane Pailhe, Institut national d'études démographiques, Paris)
- Life Course Transitions and Value Orientations: Selection and Adaptation (Ron Lesthaeghe and Guy Moors, Vrije Universiteit Brussel)

Rossella Palomba (Institute for Population Research (IRP), Rome) acted as discussant on the solicited papers.

Next, the NIEPS partners presented their recent research on gender, work patterns and family building.

The executive report on the Workshop was prepared by Kalev Katus (Estonian Interuniversity Population Research Centre, Tallinn). The proceedings of the Workshop were published by Department of Demography and Geodemography of the Charles University in Prague (NIEPS, 2003).

Childbearing in Marriage and Outside: From Unity to Gender Divide?

In her paper Magritt Jensen raised a number of questions related to the value of marriage, children and professional career, from the gender perspective. The author, *inter alia*, stressed the strong interlinkage of changing gender roles, particularly with respect to work and marriage, including children, and the intra-European levels and differences, such as the North-South divide.

In her discussion of the value of children and its linkage to family patterns and gender roles, the author sought evidence for the thesis that there is no linear relationship between female education and fertility, but that the societal context in which fertility takes place does matter. The general decline in fertility in the course of the demographic transition has taken place with a shift in the value of children from the economic to the sentimental area.

Post-transitional fertility displays considerable variation, and once again, there is no linear relationship between female education and fertility. In modern society, the level of women's ability to support the family - through education and employment - enhances fertility, i.e.

fertility is higher when women are able to support themselves more easily and the cultural settings allow children to be born outside marriage.

Using Italy and Norway as examples, representing southern and northern Europe respectively, the author explained the observed variation of fertility by introducing the concept of shrinking fatherhood. The phenomenon is seen to take two main forms: extramarital fertility and partnership dissolution (Norway) and marital births and marital stability (Italy). In the first case, high female education and employment, combined with new family forms, promote childbearing, in contrast to the expectation from the theory of the second demographic transition. In the second case, marriage as an institution has become a barrier to childbirth, and fertility remains low. The author developed the same argument from a gender perspective as well: persistent male control over fertility leads to lower fertility compared to a situation when women are in control of fertility. Neither marriage nor children are seen as an obstacle to the working career of males whereas they are, indeed, seen as obstacles for females. However, marriage is seen as a much stronger obstacle in countries where the institution of marriage is strong (Italy), and weaker where the institution is weak (Norway). If societal conditions are favourable for children, also outside marriage, and women are on their own able to support them, then women are more inclined to have children and work. Children have remained — and perhaps even to an increasing extent — a primarily female responsibility, in spite of the progress in women's education and employment.

Gender and the Welfare State

Gerda Neyer introduced political science and feminist perspectives in the discussion. The concept of the welfare state is placed in the centre of the paper with a view to formulate hypotheses about demographic changes in the regions of Europe that could be characterised as welfare states. Also both political and feminist approaches are argued to be methodologically useful perspectives for fertility research.

The author starts with the assertion that demography has paid little attention to political factors. Population research appears to be too much engaged with the individual level of organisation and is insufficiently embedded within the larger framework of economic, cultural and social systems. Also, demography is reproached to ignore power structures, conflicting interests, connections in public relations, etc. From the gender perspective, the author regards the core concepts of demographic research as often homogenised, de-gendered and even androcentric.

After an overview of different approaches defining the welfare state, the author highlights the key analytical perspectives in welfare state research in their connection to gender, family and work participation, namely social expenditures, equality-security, and power-resource.

With regard to social expenditures the author argues that the majority of tax-and-transfer benefits related to family and children in the OECD countries go to the male population, despite the fact that women do most child caring and childrearing. Furthermore, benefits paid to males are usually rights-based while those paid to females are often means-tested. Inclusion/exclusion from welfare-state provisions clearly appears gendered.

The equality-security approach regards public policies as compensating and preventing social and economic problems. Most of the parameters, by which security or equality is measured in such settings, rely on the 'male citizen wage earner' norm. In such a framework, security is mainly viewed from the perspective of the labour market and equality from the perspective of the social class of male employees. From a gender perspective, such a concept should be redefined, since it compels women to adjust to male models. Furthermore, security should include sexual security and reproductive rights, including lesbian/gay sexuality, right to contraception and abortion.

The power-resource approach stresses economic citizenship, i.e. all the components that are necessary to enable women to maintain a household of their own (with children). This has become especially important during the past decades of welfare state retrenchment and political and economic restructuring.

In her summary, the author presents a number of suggestions of how the feminist welfare state approach could be integrated into demographic research. This could show the way out from the narrow linkage of welfare state policies and demographic processes in comparative surveys such as FFS and PPA. Research of the suggested type should collect information on whether persons are taking welfare-state provisions into account when making their decisions relevant to population development. Another important direction of research on welfare policies and their effects lies in the embedding of the economic framework. Further, the need is stressed for considering more carefully the extent to which women's and men's political activities and their capacity to influence politics may be reflected in their fertility behaviour. Finally, the paper points to the need for developing gender-sensitive concepts and to shift the focus from the 'male' norms underlying our perceptions to 'gendered' norms.

Family Responsibilities and Gender Discrimination on the Labour Market

Ariane Pailhé starts from the salient contradiction in the development of women's economic role in the course of the 20th century: on the one hand a rapid increase of female labour force participation, but on the other hand persisting inequalities in the position of men and women in the labour market, including wages, professional segregation, unemployment and job security. In addition, contrary to men, women must currently combine three types of work activities: domestic, reproductive and remunerated work.

As far as concerns inequalities on the labour market, the author distinguishes three different types of inequalities women are facing. First, the majority of female jobs are concentrated in a small number of economic branches (horizontal segregation) and are grouped around a few professions (vertical segregation), resulting in a significant professional segregation. Second, there exists a wage gap between men and women, even at equal workload. This wage gap does not result from a difference in scholastic training, but is due to differences in job structure by branch and position, to discrimination in job recruitment, assignment and qualification policies and distribution of bonuses, and, last but not least, to differences in professional training and experience. Women interrupt their careers due to the birth of children or for the benefit of their spouse's mobility. The family status penalises women: a woman without children is always better paid than a mother. In contrast, marriage and children work as a bonus for men. Third, a stable job is more difficult to acquire for women. In most countries, women are more likely than men to be unemployed. In addition, women are more frequently engaged in part-time employment and recruited on the basis of short-term contracts. Although those arrangements allow women to combine family and professional work, they are not always a matter of choice. Moreover, the different dimensions of gender inequality are interrelated and mutually reinforce each other.

Examining the mechanism of female discrimination in the labour market, and more in particular employers' behaviour at the company level, the author argues that it is unusual to observe wage gaps for identical work because of the legal implications. The employers' discrimination against women is apparent either through the demand of a higher level of education, through professional segregation or is due to an imperfect knowledge of employees' capabilities. Being unable to adequately evaluate the characteristics of female candidates for a job, employers tend to apply information or prejudices about average female characteristics or stereotypes in order to judge the candidate's individual ability or productivity. Discrimination can be thwarted or compensated by means of three strategies: increasing educational investment, enhanced professional commitment or lowered fertility.

As far as education is concerned, women prefer general education to technical and/or more specialised education. Even when they choose to pursue a technical field, they tend to opt for

a general instruction, and not for training in a specific branch. These choices partly form self-exclusion strategies, resulting from the tacit acceptance of male domination. As regards the patterns of female labour force participation, the male breadwinner model is increasingly replaced by the two-career model. From the life course perspective, three types of female labour participation can be distinguished: upside-down U-shape, bimodal curve and one-peak curve.

Women make increasingly a priority of their professional commitments, and as a result, fertility has become increasingly dependent on the labour market situation, with as general impact a decrease or postponement of marriage and fertility. Among others, women do not take advantage of unemployment to speed up the birth of a (next) child but rather tend to wait for a stable professional position first. In particular there is an increase in incompatibility between work and family at the arrival of the third child. The third parity often destabilises a professional trajectory to such an extent that women usually prefer to stop working. And conversely, a successful professional career is often reached only at the cost of renouncing motherhood. There are, however, quite substantive differences between European countries in the ways women combine work and motherhood.

Analysing the concept of reconciling family and professional life the author criticises the usual approach to limit the issue to the problem of how women could balance professional work and family life, and reorganise women's working hours. Men should be also considered. However, as it is often disadvantage for men to invest more time in the family, social policy should be aimed at making true choices about employment and/or domestic work possible for women as well as for men.

Considerable disparities exist between European countries with regard to the role of society in the articulation of family and work. In countries where women are forced to choose between employment and children, i.e. where the situation is less favourable to reconcile both, fertility has seriously fallen. A well-adapted family policy needs to help women in their triple role and cut down discrimination on the labour market. The need for providing better opportunities for reconciling work and motherhood is going to become an even more urgent issue because of the population ageing which increases the number of elderly who, similarly to children, are largely left to be cared by women.

Life Course Transitions and Value Orientations: Selection and Adaptation

The contribution of Lesthaeghe and Moors aimed to illustrate, on the basis of a literature overview and the analysis of the data of the Belgian Value Studies of 1981, 1990 and 1999, how the development of value orientations contributes to choices made by individuals (micro-level) and alters social structures (macro-level), and how value orientations themselves are subject of adaptation, given earlier choices and structural transformations.

The authors analysed several theories and research results from the viewpoint of the value selection and adaptation paradigm: how value orientations could have a predictive power for later selections of different life paths and how the latter on their turn have recursive effects on value reinforcements or adaptations.

The theories and research results are grouped into four major approaches. The first of them summarises evidence from quantitative studies of modernisation processes. Among others, fertility transition as a result of modernisation in value orientations is discussed. The second group of studies embeds approaches in socialisation and intergenerational transmission of values. Here the necessity of panel data is particularly stressed. The third approach reviews the age-period-cohort studies, from the viewpoint of value stability across cohorts and age-period changes during their lifetime. Several quantitative results are reviewed, mostly in the field of political value orientations.

The paper closed with an analysis of the selection and adaptation of value orientations on the basis of the data from three rounds of the European Value Survey (1981, 1990 and 1999) in Belgium, showing that value orientations in diverse domains such as religion, ethics, gender roles, intergenerational relations, politics and work are all involved in the selection/adaptation process in the areas of household formation and demographic outcomes.

The research on gender, family and work in the national population institutes in Europe

The Workshop included a presentation and discussion of the theme-specific experiences and activities of the partner institutions, each of which prepared a short report summarising past and ongoing research activities on the theme and an annotated bibliography of key publications focusing on the workshop theme.

It will not come as a surprise that virtually all national population institutes in Europe have undertaken in the past years several investigations which are relevant for the analysis of the relations between gender, family and work. Most of those institutes are involved in European comparative surveys as FFS and PPA that are in several respects important sources of information on attitudes and/or behaviour with respect to the combination of family life and work. The FFS is of particular importance, since it includes biographies on relational, reproductive and occupational behaviour and was in most countries undertaken both on male and female samples. Many institutes also make use of other international comparative surveys such as the ECHP, the survey on Division of Paid and Unpaid Work, the Labour Force Survey. In addition, several institutes have undertaken specific surveys on the (in)compatibility between family life and work or on specific aspects of this problem, such as young adults, childcare, and time-use.

Gender is, via the sexual identity of the respondents, present in virtually all investigations undertaken by the national population institutes. Extensive research on gender relations, however, is rather limited, if present at all. Relations between gender, family and work are being studied, but again the gender dimension is only investigated by one variable (sex) or a few variables on gender relations.

By choosing the theme 'gender, family and work' as one of the main NIEPS subjects of research, the national population institutes in Europe, clearly marked their intention to pursue more in-depth knowledge on this issue.

The NIEPS partners reported on the following research activities in the domain of gender, family and work:

Population and Family Studies Centre (CBGS), Scientific Institute of the Flemish Community, Belgium

A long-established and broad research programme in CBGS has involved the regular undertaking of large sample surveys on family issues (the series 'National Surveys on Family Development', NEGO), but also data from census and vital statistics have been used for analysis. The contextual change around family matters has also been followed through monitoring the development of relevant legislation.

Three major research domains in the field of gender, family and work are pursued:

- Changes in family development
- Combination of work and family
- Living conditions and well-being of children

On family development, the evolution and changes in family formation and their implications at the societal level have been addressed. The NEGOS have enabled to study fertility issues in a wider context of relationships and family structures. The experience of combining information about gender relations, ambitions in relation to employment, division of

household activities and child-care with the complete career histories of the respondent and partner are expected to highlight the ways to combine working and family lives.

The interaction of work and family has been addressed in several specific surveys about the daily division of work, the general time budget, and several other relevant issues about attitudes and experiences concerning the combination of family and work. Also the impact of several policy measures on families is being investigated.

In recent years also survey research on children and their family and school environment has been launched.

Future research is foreseen to focus more specifically on targeted stages of the life cycle — childhood, adolescence, adulthood and old age. In that context the integration of surveys is underlined from their methodological, organisational as well as from contents' viewpoint. Future surveys are seen as instruments to formulate answers to important societal problems related to the individual life cycle, the living conditions of families and to the interlinkages and solidarity between generations. Recently a survey on 10 to 18 year olds is being carried out. A survey on elderly, including all persons aged 55 or more, has been undertaken in 2001 and the next NEGO survey is foreseen in the immediate future and will pay special attention to policy relevant information with respect to family development under the overall theme of parenthood.

Federal Institute for Population Research (BiB), Germany

The Federal Institute for Population Research has taken the responsibility to co-ordinate the second round of the Population Policy Acceptance Survey (PPA), and correspondingly, the report addresses mainly the experience from the first round and perspectives for the second one.

On the basis of the first PPA round a new questionnaire has been worked out for a comparative survey to monitor the European attitudes and opinions concerning demographic changes, population behaviour and population-related policies. In Europe, population changes increasingly require the attention of policy-makers in order to minimise the adverse effects of these trends and monitor the impact population policy might have.

PPA offers a good combination of a multi-disciplinary approach to population related issues, enabling to gather attitudinal, behavioural and contextual data for monitoring the life choices that require political interventions. In addition to its core elements, PPA gathers information about attitudes towards foreigners, life styles, gender roles, values in life, caring facilities, ageing and childcare.

Netherlands Interdisciplinary Demographic Institute (NIDI), the Netherlands

The report of NIDI is concentrating on the ongoing research on gender, family and work, specifying particularly five projects:

- Delayed childbearing;
- Female labour force participation and fertility;
- Unravelling causal connections between attitudes and demographic behaviour;
- Changing life courses;
- The future of informal child-care provision.

The Dutch experience in combining several data sources, including life history surveys, forms a significant contribution to the understanding of interactions between family and work-related life domains. The combination of cohort data (1900-1970 birth cohorts) from several large-scale Dutch surveys has enabled to focus on combinations of roles in family and employment careers in the long run. The Dutch experience in studying female labour force

participation in relationship with other life domains underlines the mutual dependency of employment and parental careers rather than a one-directional determination in one or in another way.

Combined cohort data from birth registers, medical histories and Dutch FFS data have enabled to highlight the interdependencies between the increase in educational attainment and multiple births in the situation of ageing fertility. Regarding the attitudinal dimension, efforts are made to unravel the causal connections between attitudes and demographic behaviour.

The report includes information on the major *Netherlands Kinship Panel Study*, recently approved for funding. The study is targeted towards the investigation of three types of key relationships in society: (a) those between (un)married cohabiting partners (b) between parents and their (co)resident children and (c) between family members who do not share a residence. The survey includes also the investigation of intergenerational and kinship relations. Such a demanding survey will be the first of its kind in Europe.

Institute for Population Research (IRP), Italy

The report outlines four major projects in relation to the theme of the Workshop in the period 1998-2000. First, *Permanence of Young Adults in the Family of Origin* has the aim to monitor youth attitudes, values and expectations on nest leaving, on one hand, and motives, expectations and difficulties of their parents, on the other hand. The results highlight the strict sequence of events - completion of education, getting a job and then marriage - along a model of transition to adulthood more linear and less variable than in other European countries.

Second, the project *Division of Paid and Unpaid Work* concerns the spreading of paid work among different family types and the division of household tasks (unpaid work), from a gender perspective. The survey also addresses the availability of social networks.

Third, the report informs about the recent panel survey on *Fertility Intentions*, which studies the evolution of reproductive patterns over time and is planned to be carried out annually in the future.

The Institute participates in international European research projects such as the *PPA* and the survey on *Division of Paid and Unpaid Work*.

Population Research Institute (PRI), Väestöliitto, Finland

The report highlights several projects related to family building and patterns of work from a gender perspective. In particular, the Institute has established a long tradition of collecting data and carrying out analyses on highly sensitive and intimate issues.

The combination of different sources of information, ranging from publicly available publications to data from qualitative studies has enabled Finnish researchers to cover emerging issues on the theme of the Workshop. The research includes studies on sexual behaviour and attitudes, complemented by comparative data from other countries for the evaluation of the risks of HIV infection.

The Institute's research also addresses issues of the increasing population heterogeneity. In this context the study on the marginalisation of specific population groups in the process of educational attainment deserves attention, as well as a qualitative study on the implementation of the family reunification programme in Finland.

Gender studies have focused on the labour division patterns within the family/household, based on data from time use surveys. The research on the *Division of Paid and Unpaid Work* in the Family might give insights into how the relatively generous Finnish family policy measures intertwine the division of labour between men and women.

The *Family Survey 2000* focused on the division of responsibilities between parents and professional staff in the educational establishment in upbringing children.

Department of Demography and Geodemography (KDGD), Charles University in Prague, Czech Republic

Cohort data starting from 1930 have permitted to outline the main patterns in nuptiality, divorce and fertility in the Czech Republic. Although not significantly changed during the transition period, a shift towards later marriage and delayed childbearing has been witnessed. Research results allow to conclude that the insecurity factor during the transition period might have created new family strategies.

The survey *Young Generation 1997* has highlighted the changing attitudes towards marriage, family formation and parenthood. Among other results, the childbearing plans indicate an insignificant voluntary childlessness, although the birth rates are decreasing. The survey has enabled to provide justification for the theoretical claim that contextual effects on demographic behaviour are mediated by social status.

The Department has carried out the first round of the PPA survey and the project on *Reproductive Behaviour and Public Policies in Central and Eastern Europe*. Gender issues have been studied through a survey on the economic contribution of spouses and marital power dynamics. The research topic has been approached from the structural perspective, based on the gender-neutral understanding of marital power dynamics and from gendered meanings which spouses attribute to material and non-material conditions of their lives.

Institute for Demography (IFD), Austrian Academy of Sciences, Austria

The Institute for Demography has conducted several studies since the 1980s, mainly focusing on various family-related issues.

The Institute has participated in several large-scale surveys such as the PPA and the FFS, carried out several more specifically targeted surveys, but has also rich experience in using national statistics (censuses, micro-censuses, vital statistics, administrative statistics).

Several studies have been conducted on the interaction of family and female labour force participation and the impact of various governmental policies on issues such as parental leave and day-nursery services for infants. In several studies specific target populations have been addressed, such as single parent families and handicapped persons.

In a study on family politics (based on PPA), the possible effects on reproductive behaviour patterns were addressed. The results helped to highlight the areas where family policy measures do not cover existing requirements. The newly planned family policy survey is intended to survey the conflict areas between private and public economy.

The Institute is also carrying out a longitudinal study '*Life with Children- Wish and Reality*' in which family living conditions from a female point of view are being dealt with. Particular attention is given to life ambitions of married women, their preferences concerning having children, professional life and domestic work.

Estonian Interuniversity Population Research Centre (EKDK), Estonia

The Institute has accumulated experience in conducting event-history surveys. Data from five major national surveys (Estonian FFS, Health Survey, Labour Force Survey, Minority Survey) could be used in combination for the analysis of gender, family and work.

The report mainly dwells on the experience of the Estonian FFS, particularly in view of a possible follow-up pan-European project (GGS). The Estonian FFS was extended in its programme and included a much broader cohort range that secured a more integrated approach of life careers, particularly across generations.

The Estonian experience deserves attention from three main aspects. First, the integration and more consistent use of life careers in a horizontal (broader cohort range) as well as a vertical direction (interactions between various life careers). Second, through addressing consecutive generations in every survey, their intergenerational links can be monitored. Third, efforts were made to secure the comparability across the East-West divide in several social domains, the results of which could be useful for future pan-European research activities.

The report highlights the contribution of the integrated survey programme of the Institute for the development of the national statistical system. Also, the programme has proved to enable the integration of other sources of population information into research on gender, family and work.

Demographic Research Institute (DRI), Central Statistical Office, Hungary

The Demographic Research Institute has conducted a considerable number of studies related to the theme of the workshop since the late 1960s.

Concerning family formation, research has concentrated on the evaluation of value attitudes towards the institution of marriage, childbearing and work. The results of analyses support the conclusion that value attitudes of the population tend to lag behind the behavioural patterns. Such an outcome should be regarded valuable for other Central and East European countries undergoing rapid societal change. Another empirical study has focused on success criteria of marriage, revealing that the need for strong emotional ties and own children are identified as more dominant criteria of successful marriage than socially determined aspects.

The Institute has also concentrated on childbearing intentions and value of children, in which field several empirical studies have been conducted regularly since 1992, all showing the existence of children oriented attitudes in Hungary. The surveys on family planning also reveal the high value and importance of having children.

Several investigations concern the interaction of family, professional career and household work, including the distribution of household tasks between men and women. In all of those interactions, substantial changes have been documented during the societal transition.

The research of the Institute has taken advantage of different types of social surveys, including demographic surveys, time-use surveys, labour force surveys and others. On work participation, two main aspects have been dealt with in the report. First, research has focused on the role of women in the family, economics and politics. Comparative analyses have been made with Poland, Russia and Germany. Second, research has concentrated on interactions of female's life between work and family career.

Centre of Demography (CDL), University of Latvia

The report outlines research activities relevant to the workshop focus - interaction of gender, family and work - in three directions, and covers studies of the Centre as well as other research institutions in Latvia.

As far as concerns gender relations, the report gives information on activities of newly established centres in this field. Gender issues have been addressed by Women's Studies and Information Centre (founded in 1993) and Gender Studies Centre at the University of Latvia (founded recently). In the last years two research projects on gender issues have been

conducted: focusing on gender roles and attitudes and gender equality issues in the Latvian society.

Concerning family issues, the Centre of Demography has conducted the Latvian FFS, which dealt with, in addition to family and fertility behaviour, value orientations of men and women on family functioning, motivations for fertility limitation, reproductive health, marital behaviour, including consensual unions, and divorce. Also, the Centre has studied the status of older persons families/households with respect to their economic conditions, living arrangements and gender. The Centre has also been responsible for elaborating national population projections, including projections of families and households up to 2025.

Research on work participation has been a focus of the Centre in earlier decades. Recently those domains have been mainly addressed by the Latvian Institute of Economics. The projects of the latter institute have concentrated on two issues: women's attitudes towards family, health, education and work, and quantitative and qualitative aspects of reproduction. The Centre has been involved in a project that aims at collecting and analysing information on the situation of employment and unemployment.

Institute of Statistics and Demography (ISD), Warsaw School of Economics, Poland

The main research interest during the recent years has focused on changes in women's situation on the labour market, particularly during the societal transition. The results demonstrate greatly reduced women's flexibility in the labour market. The underdevelopment of services, rigid work schedules and unfavourable changes in the social infrastructure negatively affected women's possibilities of combining paid work and family duties.

Several studies have focused on possibilities to combine (female) family and professional activities. Special emphasis has been put on the analysis of interrelations between the labour market situation and demographic behaviour, including fertility, of new cohorts entering the labour market. Changes in women's position in the labour market are fully consistent with the hypothesis about the de-stimulating impact of the economic recession on social and economic activities of females.

Research has outlined that family models are confronted with different patterns of values and attitudes and their changes imposed by the economic transition. Results of analysis have demonstrated the changing perception of social roles, in particular among young generations.

The report also gives an overview of recent activities of other relevant research institutions in Poland. Among others are mentioned: the impact of the privatisation process on women's situation; labour market changes and entrepreneurship of women under economic reforms; barriers and stimulators of economic activity of unemployed women.

The Second Workshop on Gender, Family and Work

This Workshop was organised by the Population and Family Study Centre (CBGS) and was held in Oudenaarde, Belgium, on 30 November-1 December 2001.

The Workshop had as main objectives to focus on the policy impact on gender relations, family and work and to reflect on possible future cooperative research in Europe.

The discussions on the policy issues were introduced by two groups of presentations, the first of which concentrated on the impact of policy on fertility and division of labour and the second one dealt with experiences of several gender-related research projects in Europe. These solicited papers dealt with:

- Impact of policy on the timing of childbirth and the number of children per woman (Lisbeth Knudsen, Danish Centre for Demographic Research, Copenhagen; Discussant: J. Antonio Fernandez Cordon, Instituto de Economica y Geografia, Madrid);
- Policy impact on gender relations, family and work (Gerard Frinking and Tineke Willemsen, Catholic University of Brabant, Tilburg; Discussant: Rosemary Crompton, City University, London);
- Networks and projects under the 5th Framework (Thérèse Jacobs, Population and Family Study Centre, Brussels);
- Working and mothering: social practices and social policies (Constanza Tobio, University of Madrid);
- Family business auditing (Walter van Dongen, Population and Family Study Centre, Brussels);
- Predicting the impact of policy: gender auditing as means of assessing the probable impact of policy initiatives on women (Sue Nott, Liverpool University).

The executive report on the Workshop was prepared by Peteris Zvidrins (*Centre of Demography, Riga*). The proceedings of the Workshop were published by the Population and Family Study Centre (Jacobs *et al.*, 2002).

Impact of policy on fertility and division of labour

Impact of policy on the timing of child birth and the number of children per woman

In her presentation Lisbeth Knudsen (Danish Centre for Demographic Research) starts with the question of why there is interest (or no interest) in influencing fertility patterns. Given the limited success of pro-natalist policies and the increasing degree of individualisation she identifies a shift from pro-natalist goals towards concerns about quality of (family) life, right of choice in reproductive matters, gender equity, and more recently also population ageing.

With respect to the question which family policies should be considered, the author is of the view that both direct and indirect measures should be taken into account: in measuring the influence of policies on various aspects of fertility and family formation patterns, not only family policies in the narrow sense but also policies with other targets that might influence the preconditions or family formation and family life should be included. Such measures relate to health, education, and social security and even measures in the field of environment, consumer policy and transport.

The author argues that increasing female labour force participation rates made family policies turn to the question of reconciliation between family and work obligations and then to gender equality in the family and the labour market. The way in which the working life controls peoples' time is a cornerstone in understanding their time pattern of everyday life in contemporary societies. Individuals are in need of close relations and a community should

undertake caring obligations for the children and old generations. The more recent actions in some countries taken in order to increase gender equity might aim at influencing the living conditions in a given demographic situation.

Next, the author presents an overview of current family formation and fertility patterns in Europe, illustrating the main differences in partnership patterns, timing of childbearing and intensity of fertility. Important features of late modern society are, thanks to the increasing economic independence of women and the availability of effective contraceptives and access to induced abortion, the opportunity of a reflexive formation of life biography through which childbearing and family formation may be an optional choice. She concludes that the reasons behind various patterns and regimes of family formation originated in the history, the cultural background and women's situation at home and in the labour market.

Further the author describes family policies in various regions of Europe (the Nordic countries, the Baltic countries, France, Southern Europe). The documented effects of family policy on fertility seem to have been weak, but modernized behavioural patterns in the domains of partner relations and labour participation combined with institutional support and a fairer gender system, such as developed in the Nordic countries, are, contrary to the more traditional behavioural patterns and policies in Southern Europe, associated with higher fertility levels.

The author closes with some methodological considerations on how to study the effects of policies on fertility and general well being of families in different societies and with some considerations on future perspectives. The observed differences in both timing and number of childbirths and family formation as well as the fact that family forms are developing at a different pace across Europe raises the question whether the same European family policy is possible for all countries or whether the same effect of specific policies can be expected everywhere. An exact answer on this question is not given. However, the author concludes that persisting diversity is a great challenge to develop new methodologies for research as well as new theories.

In his discussion of Knudsen's presentation Juan Antonio Fernández Cordon (Instituto de Economia y Geografia, Madrid) deals first with the meaning and relation between the timing of childbearing and the number of children per woman. He considers that there is little doubt that they are related but when assessing the effectiveness of a specific policy it is important to note that the impact on the timing of childbearing does not necessarily mean a change in the completed lifetime fertility while a change in the number of children implies almost certainly a change in the timing of births. It is necessary to define carefully final objectives of policies as they could have an impact on some fertility components without having an effect on the final descent in the long run.

Cordon also argues that policy measures become meaningful and eventually effective only if inserted in a broader theoretical and policy perspective, i.e. rely on a theoretical framework and allow for an anticipation of the policy impact and ensure that envisaged policy measures display an internal coherence and are in accordance with the actual situation of the targeted population.

The discussant considers the reconciliation of work and family life as a major issue for family policy, since we are witnessing a gradual shift from an old reproductive model characterised by a segregated gender role distribution in which production is done by the male breadwinner in the workplace and reproduction ensured by women in the family towards a new model characterised by the dual breadwinner household type. Where working relations and the societal organisation continue to be based on the old model, women adopt as risk reducing strategy the reduction of their number of children.

The discussant analyses next how the southern European countries, and more particularly Spain where we find paradoxically – given the degree of economic development and the

cultural and religious tradition - the lowest fertility rates in the European Union, fit within this framework. His analysis shows that the recent fast increase in women's labour participation and changing attitudes towards work was not preceded or accompanied by family policy or gender equity measures adapted to the newly developing family model and gender relations. The formerly existing public opinion lag concerning the traditionally high Spanish fertility levels, the rejection of policies reminiscent of the old dictatorial regime and the supportive role of the extended family and in particular of grandparents are cited as some of the factors responsible for the delay in policy response to the newly developing situation. In the southern European countries families and in general close relatives have acted as social shock absorbers "taking the place of financial" support and providing services that the state should supply. The need for support to working mothers most commonly has been satisfied inside the extended family network where the grandparents played an important role. But also this is changing nowadays since the new generations of grandparents will be less willing or able to act as replacement parents.

Cordón concludes that low fertility situations are one of the symptoms of the transition from old arrangements based on strict gender division roles to modern forms of family and gender relations. The southern countries of the EU started this transition later than northern and central countries. The impact of policy on fertility will depend on how supportive different measures are to the new model and to what degree measures will be oriented towards support of young people to reconcile their family and care obligations with their labour market involvement.

Policy impact on gender relations, family and work

Gerard Frinking and Tineke Willemsen (Catholic University of Brabant, Tilburg) reported some of the research activities of the European Network on Policies and Division of Paid and Unpaid Work.

First the authors deal with methodological issues and the adopted theoretical framework to explain the division of paid and unpaid work among men and women. The authors note that in most surveys information about behaviour of men and women and policies is not collected. In their European Network on the role of policies with respect to the division of paid and unpaid work they tried to combine both of these types of information. The main question of the research programme of this network was whether policy measures are able to change the division of paid and unpaid work among men and women in a more egalitarian sense. The Network undertook a comparative microdata survey in seven EU countries (Finland, France, Germany, Greece, Italy, the Netherlands and Portugal) and a policy-oriented Delphi study in five countries (Belgium, Ireland, the Netherlands, Spain and the UK). The theoretical framework of the project is based on Bourdieu's theory of practices. Their report in the NIEPS Workshop was restricted to an explorative analysis of the survey data.

The survey findings show that there are no major new patterns of work and care in families: men do most of the paid work, women do most of the child care and almost all household tasks. However, some new patterns may be developing, especially with regard to paid work and childcare. Women have definitely entered the labour market. In each country a positive relation exists between the level of education and the workforce participation of mothers with young children: the higher the level of education, the more women are involved in different forms of paid work. This finding leads to the suggestion to develop (or maintain) an active equal opportunities policy regarding education in countries where the educational level of men and women is different (if one wishes to increase employment of women).

There is a strong relationship between the composition of the household and the working behaviour of women. If there is either a man or child, fewer women than men work at all, but those who do work tend to work more often part-time. If both a man and one or more children are in their life, women's workforce participation is even more diminished.

Although childcare is still mainly a mother's role, it is a new development that, in general, fathers devote a substantial time to childcare. The fathers' efforts, however, are most important in the most enjoyable child care activities like playing and reading stories. Where childcare tasks are contracted out, fathers devote more rather than less time on their children. This suggests that extending childcare facilities both to fathers and mothers can contribute to diminishing women's double burden and facilitate their workforce participation and help realize a more equal time division between men and women.

In the domain of household work, the survey found a very traditional situation with the most substantial gender inequality. Women perform about three times as much of the household work as men. In most countries there are very few, if any, policies aimed at making the task division in household work more equal. This remains a difficult domain for policy makers and forms a new challenge to develop policies for egalitarian change.

In conclusion, there still appears to be substantial sex differences in the hours devoted to work, childcare and household work. Besides, women's behaviour is much more related to their family situation than men's behaviour. Men have changed less than women. The existing policies succeeded in making women more equal to men in paid work, but hardly or not in making men more like women in traditionally feminine household work and childcare. Therefore, it is advisable to develop more policies directed mainly at men in order to stimulate their activities in the domestic sphere.

In her comments, discussant Rosemary Crompton (City University London), mainly complements Frinking's and Willemsen's findings with the results of her own recent research on the same topic.

Crompton suggests that a complementary way of approaching the impact of policy on gender related divisions of labour within households is to select countries with very different family policies and to analyse variations in the division of work, domestic tasks and caring responsibilities against the background of those policy differences. She adopted that approach in her recent biographical work on employment and family patterns in two occupational groups (female and male bank managers and physicians) in three countries – Britain, France and Norway – characterised by very different policies in respect of state welfare, gender equality and family and childcare policy. Norway offers the most favourable context, Britain the least favourable and France somewhere in between.

In her theoretical introduction on possible household arrangements following the erosion of the male breadwinner/female carer model, she distinguishes a range of possibilities, *inter alia*, the male main breadwinner/female part-time earner and the dual earner/dual carer model. The male breadwinner/female carer household arrangement is likely to be associated with relatively traditional gender relations. In the male main breadwinner/female part-time earner model women often retain the major responsibility for caring and domestic work whereas women's full-time work has been more likely to be associated with a more egalitarian pattern of gender relations and the domestic division of labour. Those three types of household arrangements coincide with major ideological-political orientations – the political and intellectual right, the centre-left and the feminist approach.

Crompton's empirical findings on the employment/family patterns of bank managers and physicians show that in all three countries, the contrast between the women and men was that men had lived with partners who had taken the major responsibility for young children whereas the women had fewer children and most of them had taken the primary care responsibility when their children were young. Older women who had reached managerial level were either childless, had only one child or experienced a break-up of their relationship. Both women and men in the banking sector experienced highly demanding pressures in their job, not particularly compatible with family life. The physicians appeared to have a larger degree of individual choice in combining their career with family life and, hence, tended to have more children. Even in circumstances in which the national or occupational

environments are favourable to family (or carer) friendly employment practices, occupational pressures appear only be taken up by those prepared to curtail their individual career possibilities.

Crompton's results suggest that, although national institutions can and do make a difference, global capitalist constraints cut significantly across countries. Contemporary EU policies on family and employment contain within them elements of contradiction: neo-liberal economic and labour market flexibilisation is being promoted alongside the encouragement of "family-friendliness" in employment, however, increasing performance pressures on employees make paid work even more difficult to combine with caring responsibilities. Moreover, the social democratic de-familisation strategy is expensive for states to support and economic marketisation (globalisation) threatens nationally specific provisions although national normative path dependencies are substantial in shaping policies.

Crompton, hence, concludes that, although she finds herself in agreement with the conclusions of Frinking and Willemsen that more policies should be directed at men in order to enhance their participation in the domestic sphere, institutional (state) supports will continue to be necessary if non-destructive post breadwinner employment and family arrangements are to be achieved.

What can be learned from gender-related projects?

Networks and projects under the 5th Framework

Thérèse Jacobs (Population and Family Study Centre, Brussels) presented the inventory of projects funded under the 5th framework of the European Community (1998 to 2002). It seems that researchers dealing with social policies in general discover the field of family policy. The interest of researchers in family functioning, changes and processes is obvious in the 5th framework. The projects largely deal with gender equality and work-family balance policies. A few projects specifically concern men. The author sees also an increasing interest about preferences and patterns of fertility that, in her view, has nearly reached the status of politically correct language.

Working and mothering: social practices and social policies.

Constanza Tobío (University of Madrid) reported on the research results of the EC/TSER thematic network "Working and mothering: social practices and social policies". This network was established by scholars from nine different, mainly western European countries to examine the possibilities and limits of a reconciliation of working and mothering. The research group aimed, through the organisation of five seminars in the period 1998-2001, at analysing the complex nexus between policies and social, cultural and economic factors for the integration of mothers into the labour market.

The analysis of the relations between female employment and policy provisions shows that the state's support of caring (especially caring for children, but also for elderly) is a crucial determinant of whether women are economically active. On the other hand, no systematic relation was identifiable for taxation policies or for parental leave policies. Of particular importance, however, is the way in which single measures are related to the set of policies that frame them.

The shift from the male breadwinner model towards an 'adult worker model' has not been accompanied by a complete societal adaptation. As long as the care question is not solved, the new paradigm based on paid work confronts many women with new problems. It is therefore not a complete surprise that many mothers prefer part-time work, irrespective of their social security system, - a finding which was, however, disputed. The overall trend towards flexibility appears to have both positive and negative effects on the situation of women in the labour force, but many women obviously belong to the losers in that process. The age of

flexibility will require the development of a 'flexicurity', providing protection for the more precarious side of this trend.

The rather considerable between country variation in the policy logics of public child caring is explained by the differences in cultural norms and values about the role of the state towards children and specific policy goals, e.g. concerning the involvement of women in the workforce. The various traditional policies are undergoing changes under the pressure of the changes in family structures and societal transformations in general, leading to an increasing convergence.

Gender relations in dual earner couples are based on different moral principles: responsiveness, agreements and gender ascription. Patterns of economic sharing in the household are not always congruent with the distribution of domestic work. Reciprocity and exchange behaviour is often hidden behind notions of love, altruism and moral gift economy, resulting in the fact that women are disadvantaged in the outcome of the exchange relationships.

As far as concerns strategies, there is a clear common trend all over Europe towards women's participation in the labour market as the norm. The best option seems to be one or two children in a dual earner family. Regarding the conduct of women's daily life, there appears to be an increasing variety in working time arrangements. The majority of women experience non-conform working hours. It is suggested that we are witnessing a modernisation of patriarchal family structures, as family work is redistributed mainly between different groups of women. Women's progress in the public sphere is not happening on the basis of an increasing equality between the sexes, but due to an increasing inequality between women.

Notwithstanding an increasing control over reproduction and a decreasing dependency on individual men, women are still not integrated in modern welfare states on equal terms with men. Even in the most advanced welfare states, care for dependent people has not been completely collectivised. The social and political construction of motherhood is set within a framework in which formal employment is still favoured over informal care.

With respect to fatherhood, notwithstanding an increasing male involvement, the persisting inequality in division of household tasks was illustrated for different countries. Men, moreover, participate less in the least valued housekeeping work. On the other hand, a substantial variation between men, going from 'overactives' to minimalists, is observed.

Family business auditing

Walter van Dongen (Population and Family Study Centre (CBGS, Brussels) presented results of a research project on the development of an adapted audit-instrument "Family and Professional life" for the realization of an emancipated and family-friendly labour organization within Flemish companies. This instrument consists of a diagnostic instrument and management plan.

The author notes that the project consists of two main parts, which are classified on the basis of the difference between the macro and micro level, where families, companies and the government play a specific role within each part. He stresses that with the new project of the active welfare state Belgium has come to an important turning point in its development. Some other European countries and the EU also seem to support it to a large extent. However, the project is still in its initial stage, and the realization of a better combination of family and professional life of men and women is one of the main challenges within this model. The first condition in order to have real adequate policy to realize the complete model is the availability of sufficiently integrated data systems about the daily life of families and their members. The author concludes that, in general, companies use insufficiently such information for the development of their internal organization and market policies. Furthermore, it is important to develop specific audit systems concerning families and

professional life of men and women to support firms and families in their realization of family and business policy.

Gender auditing as means of assessing the probable impact of policy initiatives on women

Sue Nott (Feminist Legal Research Unit, Liverpool University) outlined the findings of an EC/TSER research project (the PIP project) involving research partners from five western European countries. The project addressed the continued significance of gender as a factor in social exclusion in the European Union. Its aim was to devise a procedure for auditing laws and policies to eliminate gender impact before the laws are implemented.

The PIP project came to the conclusion that traditional strategies for promoting gender equality have produced limited gains. Whilst such traditional strategies can undoubtedly be utilised more effectively, it is suggested that the introduction of gender mainstreaming offered the opportunity to address gender inequality more systematically than was the case with other equality strategies. Essentially this is because mainstreaming looks at the potential gender impact of all laws and policies before they are put into effect.

In assessing gender impact there is a need to accumulate evidence either in the shape of statistics or of views from the target group. Mainstreaming can thus become an inclusive process drawing into government groups of experts whose views were previously unheard. The author emphasizes that there is a danger that mainstreaming with its notion that equality is everyone's business will be used as an excuse for dismantling specialised equality mechanism. Moreover, there can be doubts over the ability of mainstreaming to resist the pressures of the marketplace. Whilst it is a strategy that may work well in the public sector, this may not be the case in the private sector when confronted with the pressures of profitability and deregulation.

Proposals for future comparative research

The Workshop discussions on possible future comparative research in Europe in the field of gender, family and work was introduced by the report of the NIEPS Technical Meeting on Gender, Family and Work (*Zsolt Spéder, Demographic Research Institute, Budapest*) and a discussion paper on a possible framework for a comparative survey on gender, family and work in Europe (*Robert Cliquet and Dragana Avramov, Population and Social Policy Consultants, Brussels*)

The results of the NIEPS Technical Meeting on gender, family and work

This Technical Meeting was organised by the Demographic Research Institute (Budapest) and was attended by experts from five NIEPS partner institutions (Spéder, 2000).

The aim of the Technical Meeting on gender relations, family building and patterns of work was to undertake an in-depth examination and evaluation of survey instruments used in the partner institutes in order to prepare, on the basis of the results of the first workshop, drafts outlines of innovative frameworks for research instruments to be used in future comparative research.

The review of the surveys undertaken by the partner institutions revealed that most, if not all institutes had experience with one or more surveys on fertility and family formation - Comparative Fertility Surveys (CFS), World Fertility Survey (WFS), and Fertility and Family Survey (FFS) - in most of which the relations between family building and patterns of work were approached in a life course perspective. Some institutes undertook also surveys on some aspects of gender relations - e.g. gender specific task division and decision-making in the household, parental involvement - and their relations with labour participation. Although population institutes systematically consider gender as a basic category in their family and

demographic analyses, they seldom developed specific gender research in its own right. There is a lot of gender research going on outside the partner institutes, but there are virtually no surveys, neither inside, nor outside the partner institutes, in which ‘the triangle’ – gender, family and work – was investigated in its entirety.

The Technical Meeting discussed the specificity of research to be undertaken by population institutes on the ‘triangle’ and made the following suggestions for future comparative research activities.

There are complex relations and interactions between gender, family and work, and this triangle can be approached from a multitude of viewpoints. From the population perspective and in view of the specificity of population and family research institutes, the finality of this type of study is to analyse the effects of these interrelationships on relational and reproductive behaviour, family formation and family relations.

In the research set up the dichotomy ‘work-family’ as competing domains of human activity needs to be complemented by a third, increasingly more important domain, leisure. Thus, a triad in which ‘work-leisure-family’ is studied from the gender perspective needs to be developed into a coherent research scheme.

The Technical Meeting considered it useful to envisage comparative secondary analyses of existing demographic and some general socio-economic internationally comparable surveys, which include relevant information on two or more of the themes of the above-mentioned quadrangle. The following internationally comparable surveys/databases were considered to be pertinent: Fertility and Family Survey (FFS); Population Policy Acceptance Survey (PPA); European Community Household Panel (ECHP); European Value Study (EVS); Labour Force Survey (LFS); International Social Survey Program (ISSP).

The Technical Meeting also proposed the launching of a new large-scale internationally comparable survey on ‘gender-labour-leisure-family’. The survey should include a biographic section in which at least the major biographic events with respect to partnership, fertility and activities, would be recorded. Also a parsimonious battery on ‘time use’ should be included. Past and present events as well as future perspectives should be dealt with. A broad variety of covariates should be included. In particular values and attitudes concerning the four components of the quadrangle would have to be investigated.

The survey would have to address independent samples of men and women, and possibly interview also the partner of the respondents. The age range should include adolescents (15-19) and adults up to the age limit that is complementary to the lower age fixed in the NIEPS proposals for a comparative survey on the aged. It might be envisaged to over-sample particular subpopulations such as singles, one-parent families, divorcees, immigrants or ethnic minorities.

The survey could be coordinated and integrated, but not merged with the survey on the aged and intergenerational relations that NIEPS proposed in its Workshops on ‘Ageing, Intergenerational Solidarity and Age-specific Vulnerabilities’. The survey should also include a common core of background and other covariates with the ‘Comparative Survey of the Integration of Migrants’ NIEPS envisaged in its Workshops on Demographic and Cultural Specificity and the Integration of Migrants’.

The new survey should, in specific segments, be comparable to the Fertility and Family Surveys undertaken in the 1990s. However, the new proposed survey should, much more than was the case for the FFS project, be supplemented by an analysis of contextual data.

In addition to the above-mentioned large-scale survey, the Technical Meeting suggested that internationally comparable small-sample surveys could be set up in a concrete, more homogeneous institutional environment (e.g. a large international company), allowing to have

a more accurate understanding of the work environment, the child care facilities, family networks, commuting time and facilities and their impact on family development.

Framework for a future comparative large-scale survey on gender, family and work in Europe

Cliquet and Avramov based their suggestions for a possible framework of a future comparative survey in Europe on gender, family and work on the proposals of the NIEPS Technical Meeting on Gender, Family and Work and on their preparatory work for the drafting of the monograph which relies, in addition to the NIEPS workshops, on the consultation of the relevant recent literature. They were also inspired by a survey proposal of the Staff of the Population and Family Study Centre in Belgium: “Families in Transition. An Integrated Survey on the Life Course of Flemish Families” (CBGS, 1998).

Hypotheses

In addition to the basic hypothesis concerning the triangular structure of the general framework of a new large-scale comparative survey on gender relations, family building and work patterns in Europe, several specific hypotheses to be tested or documented in the new survey round were discussed at the NIEPS Technical Meeting:

- Gender equity and fertility (policy) (e.g. Chesnais, 1996; den Dulk et al., 1999; Mc Donald, 2000; Pinnelli, 1995; 1999)
- Combination model and fertility (e.g. Van Dongen et al., 2001)
- Policy requirements and possible demographic effects of changes in the sequence of events in the life course (Cliquet, 1998; Avramov 2003)
- Leisure/fun society and fertility (Keyfitz, 1987)
- Medically assisted fertility (Beets et al., 1994)
- Shrinking fatherhood vs. new fatherhood (Collier, 1999; Jensen, 2000)
- Effects of the transition shock in Eastern Europe (Dorbritz & Philipov, 2002)

Some of those hypotheses touch the very essence of the triangular relations between gender, work and family. Others are of a more specific nature but form nevertheless also relevant components of the phenomena to be studied.

However, advantage should be taken of a new large-scale survey in Europe to test or document, without substantial enlargement of the survey, several other interesting hypotheses and theories which are currently discussed in the literature and which are relevant for or related to the gender-family-work triangle. A few examples of other specific hypotheses which could be dealt with in the new survey round are:

- Reversal of differential reproduction according to social success (e.g. Osborn & Bajema, 1972; Vining, 1986)
- Effects of innovative cultural values and political attitudes (e.g. Lesthaeghe & Moors, 2000; Neyer, 2000)
- Effects of disadvantaged parental antecedents (e.g. Goldscheider & Goldscheider, 1993; Hill & Yeung, 2000; Kiernan, 1992; Thornton, 1992)
- Reproductive behaviour of reconstituted families (e.g. Hoem et al., 2000; Thomson et al., 2000)
- Development of a dual family system (Keilman, 2003).

Complementary qualitative surveys

In the literature, many authors suggest that the large, quantitative surveys on gender and family relations should be complemented by and integrated with smaller qualitative, in-depth surveys (e.g. Locoh, Andro, and others in Condon et al., 2000). The qualitative approach is strongly advocated in feminist quarters where the quantitative survey methodology,

considered as a typical 'male' methodology, is heavily criticised because it would emarginate women. Some authors plead even for a broader mixed research approach in which several research methods (large scale surveys, ethnographic surveys, contextual research, demonstration research, non-experimental behavioural research, etc.) would be used (Moffit, 1998).

As far as concerns the application of ethnographic research it is argued that the study of family relations requires fine-tuned qualitative methods of investigation allowing for the analysis of interactions between family members and the adjustments through which they make sense of their world, create a life-world, and elaborate a coherent recipe of shared meanings. Qualitative methods are more particularly needed for discovery and construction of understanding in new, under-researched domains of study.

In recent decades qualitative computer software packages have been developed to analyse complex qualitative data (e.g. Alexa & Zuell, 1999; Denzin & Lincoln, 1994).

Contextual analysis

The NIEPS Technical Meeting suggested that the large-sample representative surveys should be accompanied by a contextual study on gender, family and work, including the use of quantitative contextual indicators to be added to the survey databases and used in the analysis of the survey results. Particular attention should be given to policies, as suggested in the first Workshop on Gender, Family and Work (Neyer, 2000). Relevant policy measures or events should be recorded and located in time so that they can be linked to the life course events of the surveyed populations. The inclusion of a contextual analysis integrated in a survey design is highly recommended in the literature, but has seldom been implemented in large-scale demographic surveys.

Survey design

Given the complexity of the contents of the proposed gender-family-work survey and the delicate nature of some of its components, the survey should be undertaken as an individual oral interview, possibly complemented by a written questionnaire on time use to be mailed back after the interview.

Nowadays, researchers regularly plead for a panel design on survey subjects such as gender-family-work. Although such a design has in many respects advantages, it is not without considerable risks. Panels not only face serious sample attrition risks, but require continuity in research strategy, research team composition and funding. For some countries the preconditions for a panel design might actually not be present. A panel design of the GFW survey should be optional, depending upon the availability of resources and manpower. The idea would be to re-interview part of the sample at least once in 5 years.

Following the suggestions of the NIEPS Technical Meeting on Gender, Family and Work, the GFW survey sample should be composed as follows:

- The age range of the sample should include age 15 to 49. This age range not only covers largely the female reproductive period, but is also complementary to the age range which is suggested by the NIEPS Technical Meeting on Ageing which would cover ages 50 to 89;
- Independent samples of women and men should be included in the survey, so as to have a representative sample of each of the two sexes;
- In addition, the current partner, if any, of the respondents should be interviewed. Both partners should be interviewed separately.
- The samples should include all citizens, i.e. nationals as well as non-nationals. At the national levels, the inclusion of non-nationals will probably not allow a separate analysis of this subpopulation, except when it would be oversampled. An argument in favour of the inclusion of non-nationals is the fact that increasing numbers of

individuals of foreign ethnicity have become nationals via naturalisation. The inclusion of non-nationals would provide a complete picture of the *de facto* population. Moreover, the combination of data on ethnic identity, naturalisation and nationality would give a more complete picture of the population of foreign origin. For the international comparative study, the inclusion of non-nationals would have as advantage that the pooled country data would provide sufficient numbers of non-nationals to include this issue in the comparative analysis;

- For the analysis of the interrelations between gender, family and work, it might be appropriate to over-sample specific household types or living arrangements in the surveys. The recent experiences with the FFS and the ECHP concerning the prevalence of the major household types, marital status groups and living arrangements, shows that it might be useful, depending on some specific survey aims, to over-sample some of the following: single-person households, one parent families, non-marital cohabitants, Living-Apart-Together relations, divorced, widowed, extended households.

Strategy to develop a future comparative survey on gender, family and work in Europe

Lessons need to be learned from other initiatives such as the Generations and Gender Programme - GGP - (United Nations, 2000) and cooperation pursued with institutions and experts that are not part of the NIEPS network. It is highly unlikely that several partly overlapping surveys could be organised by the existing population institutes.

A possible future comparative survey on gender, family and work in Europe should involve, in addition to population institutes, specialised institutions and experts on gender studies, labour studies and social policies.

The development of the future comparative survey on gender, family and work will require substantial preparatory work and will necessitate the input of special expertise, more particularly on gender relations, values and policy issues. The preparatory work includes among others the production of

- A theoretical framework paper;
- The questionnaire and related instruments;
- A background paper on the contextual analysis to be performed.

It would also be useful to foresee a working party on methodological issues and the elaboration of a background document on the multivariate statistical methods to be applied, more particularly for the cross-country comparative analysis and for event history analysis (Gauthier, 2000; Hox, 1995).

The request for EC funding for the preparation and/or the implementation of a future comparative survey and its comparative analysis might include the following steps and alternatives:

- Development of a research framework paper on the comparative survey and the contextual analysis and of the survey instruments (questionnaire etc). For this stage there are two possibilities: either a number of NIEPS (and other joining) institutes invest their own resources in the production of the theoretical framework and the questionnaire or a project proposal is submitted to the EC in the 6th Framework Programme to prepare those documents, provided the 6th Framework includes a methodological section.
- Organisation of the new survey in a sufficient number of countries allowing for an international comparative study. For this stage there are also two possibilities which have to be explored: either funding of the national or regional surveys by the national institutions (governments) themselves or co-funding of (at least some of) the national surveys by the EC and national bodies via a project proposal to be submitted to the EC 6th Framework Programme, provided the 6th Framework includes such a possibility.

- Development and submission to the EC of a project proposal for an international comparative analysis of survey results.

The development, implementation and analysis of a comparative European project on gender, family and work and the submission of a future project to the EC 6th Framework Programme will need the continuation of NIEPS or its replacement by a similar network or consortium. This organisational matter includes, among others, the following: the identification of the partners; the appointment of (the) coordinator(s); the inclusion in the network of institutions, organisations or experts, specialised in specific domains (gender relations, values, policies, contextual analysis, coordination). The new EC policy with respect to the 6th Framework Programme might require a specific format of the future network or consortium.

Demographic and Cultural Specificity and Integration of Migrants

The 1st Workshop on Demographic and Cultural Specificity and Integration of Migrants

This Workshop was organised by the Federal Institute for Population Research (BiB), Wiesbaden, Germany and was held in Bingen, Germany, on 10-11 November 2000.

The Workshop had as main objective to concentrate on the state of the art concerning the demographic dynamics of immigration and the integration of migrants. It was expected to assess to what degree these topics have been investigated, which hypotheses have been tested and with what method in order to lay the groundwork for more comparable demographic research. Particular attention was to be paid to the policy implications of the findings. Finally, the Workshop had to formulate guidelines for the forthcoming Technical Meeting on the development of further research instrumentarium in the field.

The discussions at the Workshop were first introduced by two solicited presentations, each followed by comments of a discussant. The solicited papers and comments dealt with:

- Europe's Migration Field (presentation by John Salt, University College London and comments by David Coleman, University of Oxford);
- Integration Research in a European Perspective (presentation by Friedrich Heckmann, University of Bamberg and comments by Raimondo Cagiano de Azevedo, University "La Sapienza", Rome).

Next the NIEPS institutes and three invited non-NIEPS-members (Lars Østby, Statistics Norway, Oslo; Ron Lesthaeghe, Interface Demography, Vrije Universiteit Brussel; and Hans-Joachim Hoffmann-Nowotny, Sociological Institute of the University of Zürich) presented their migration research.

The executive report on the Workshop was prepared by Peteris Zvidrins and Zaiga Krisjane (Centre of Demography, University of Latvia, Riga). The proceedings of the Workshop were published by the Federal Institute for Population Research (NIEPS, 2001)

Europe's Migration Field

John Salt first gives a brief review of the many reasons why people move, in view to illustrate what migration is understood to be. The contemporary comprehension of the concept includes a broad variety of forms of migration that should not be considered as rigid categories or placed at some defined point on the mobility continuum.

The paper moves on to present the basic patterns and trends in migration in Europe today. The foreign population in Europe appears to constitute about 21 million people. The greater part of this foreign stock is resident in Western Europe. The largest proportions of foreigners (excluding small Andorra and Liechtenstein) are in Luxembourg, Switzerland, Austria, Belgium, and Germany. The proportion of foreigners in the total population varies considerably from country to country, although proportions have generally been rising. The trend in naturalisation has also been upward. The composition of the foreign population in Europe by current nationality shows a considerable diversity, two thirds of whom, however, are from European origin. The largest group of foreign nationals resident across Western Europe come from former Yugoslavia; next are Turks, followed by Moroccans and Algerians. The author characterises Western Europe as a whole as a substantial region of immigration measured on a global world scale.

As far as concerns the current flows of migrants into and within Europe it appears that migrants tend to flow to where their countrymen are, thus reinforcing existing distributions.

The lifting of the Iron Curtain promoted an increase in migration flows within and from countries of central and Eastern Europe, but most flow data on foreign immigration in the region refer to permanent immigrants. Numbers are modest and generally not rising; however, the data may considerably under-record total flows.

Approximately one third of recorded foreigners in Western Europe are foreign workers. In addition unrecorded foreign workers have to be taken into account, the share of which is almost certainly higher than the unrecorded foreign residents in the total population. In Eastern Europe the number recorded are low in comparison to those in Western Europe. After a period of stagnation or even slight decrease in the beginning of the last decade, the number of foreign workers tends to increase again in several Western European countries. While permanent emigration from Eastern Europe has been lower than many expected, substantial temporary labour migration to Western Europe is taking place. In Eastern Europe inflows of workers are occurring, polarised between the highly skilled (mainly from the West) and those fulfilling low skilled jobs originating from the Eastern lower income countries and from the developing world.

Inflows of asylum seekers to the EU and EFTA states have fluctuated in total and between destination countries since the mid-1980s. Sending countries are mainly Turkey, former Yugoslavia, Iran, Iraq, Somalia, and Sri Lanka, countries of conflict likely to create populations in need of protection.

Europe as a whole can be subdivided into several distinct migration fields: Central and Eastern European countries show a relatively strong self-containment, most of their immigrants coming from other CEE countries. The Scandinavian countries also show a relatively high degree of Euro self-containment with immigration mainly from EU and EFTA states and other European countries (Turkey and Yugoslavia). Germany and Greece mainly attract immigrants from Central and Eastern Europe. In contrast, almost one third of UK's immigrants come from outside Europe. The Mediterranean countries and also the Netherlands tend to attract people beyond Europe.

There are also striking between country differences in the recruitment of immigrants from high and low income countries: Luxembourg, Ireland, UK and Belgium recruit more from high income countries, while the reverse is the case for Germany, Italy, France and Finland.

All of those elements are relevant for estimations and projections of future scenarios in the development of the European migration system, taking into consideration the enlargement of the EU towards Eastern Europe.

One of the core ideas in Salt's paper is that contemporary international movements are a business, partly legitimate, partly illegitimate, out of which a range of participants – individuals, agencies and institutions - seek to profit. Salt illustrates his thesis with two examples: (a) governmental sponsoring emigration and immigration policies which try to relieve the pressure on the labour market and to obtain remittances and savings returned to their economies on the one side, and on the other to boost their economy by attracting particular profiles of immigrants; (b) illegal (irregular) migration traffickers and smugglers who take advantage of the poor economic or political situation in developing countries and the international weaknesses in the immigration control, move people from one country to another for motives of their own profit.

Finally, Salt advocates the need for developing a new migration management strategy for Europe as a whole. Because the circumstances of the last decade have led to the evolution of a series of migration-related policies, pursued in parallel rather than in an integrated fashion, European migration policies currently address a series of issues separately: labour, family reunion and formation, asylum, trafficking and illegal flows, and integration, regularisation, return migration and prevention. A proactive, comprehensive and integrated management

strategy for Europe should be developed based on four principles: orderliness, protection, integration, and co-operation.

In conclusion the author points to priorities and further directions for research. The need to know much more about certain trends in migration in the context of developing a common European migration and asylum policy, to improve databases, to monitor at both national and international levels, and to develop the European Information System (EMIN) is stressed. Attention should also be given to detailed analyses of changes in occupational structures on the one hand and demographic changes and workforces on the other, using an internationally comparable basis. Research is also needed to determine the role played by foreign workers and the role of intermediary institutions in setting up and maintaining migration businesses.

In his discussion of Salt's contribution, David Coleman (University of Oxford) congratulated the author for his cogent analysis of European migration based on a broad and deep knowledge of the data and making a balanced and objective analysis of events too often distorted by passion or sentimentality. However, the discussant drew quite different conclusions from past practices and challenges much of the policy discourse on migration.

The discussant first considers the economic and demographic environments in Europe, as these are the usual starting-point for the supposition that the time is now appropriate for re-thinking European immigration policy, namely that Europe should attract more immigrants. The discussant advances a number of arguments that undermine the thesis of the need for new migrants:

- unemployment ranges up to 15 percent in European countries and averages 9 percent in 11 EU member states;
- in many European countries unemployment among foreigners is 2 to 6 times higher than among the local population and have lower labour force participation rates;
- past experience shows that labour immigration can be quite an inflexible response to fluctuating labour needs, whereby the costs of later redundancy and dependency are passed on to the taxpayer;
- the immigrant stocks are augmented with dependents via family reunification, family formation and (often) higher fertility;
- the current excess unmet demands in specific domains of labour such as information technology, health care and teaching, are examples of economic domains which suffered chronic under-funding and poor planning of training of the domestic population and do not originate in demography.

As far as concerns the demographic environment for migration, Coleman criticises the UN report on Replacement Migration, "a detailed and impressive, but nonetheless incautiously presented speculative demographic exercise". He argues:

- only brief attention is paid to other responses to low fertility, through fiscal measures and the labour market;
- population ageing cannot be solved. Population ageing is an irreversible consequence of two welcome and permanent revolutionary developments in human society (limited control over mortality and near complete control over family size). The unusual favourable dependency ratios of the 20th century were a transient feature of the demographic transition, never to be repeated. Immigration cannot solve population ageing except at the cost of third-world rates of population growth;
- the demographic target of constant population size is by no means universally accepted by Europeans;
- it has yet to be shown that extraordinarily general labour needs, over and above particular shortages, are required in most European countries at least for the two next decades;
- the hidden and potential labour force in Europe is substantial. As the actual age of retirement in Europe is just under 60, there is plenty of scope for longer-term increases in working life as active life-expectation increases.

The discussant sees in the renewed interest for migration also political motives: centre-left governments are more sympathetic to the claims of asylum, more suspicious of national and nationalist sentiment, more attracted to internationalist manifestations of goodwill and believe to receive more support (and votes) from immigrants.

With regard to data issues the discussant emphasises that asylum statistics must be included in any general discussion of migration. He also draws attention to the fact that naturalisation makes foreigners disappear in statistics, often in large numbers. He points out that with a preponderance of cultures very different from those of the receiving country and encouragement given through multicultural policy for the retention of the former values and customs of the country of origin, naturalisation may not signify much beyond the acquisition of new rights.

Coleman concludes his comments with a number of policy issues. First the discussant esteems it likely that migration pressure, labour demand, levels of unemployment, housing shortages, racial tensions and public opinion may vary considerably among European countries, which seems to be an argument for the continuation of a national level management of migration. Concerted international action is obviously appropriate to those forms of migration, in particular asylum, which arise solely from international treaties.

With respect to the management of migration the discussant considers it of crucial importance that the costs and benefits of migration be evaluated in a comprehensive way and in a longer-term view, taking into account not just the short-term demand for labour and its immediate benefits, but also the total cost of the integration process, including the costs of meeting the education, health and housing needs of immigrants and their descendants, the net effects upon crime and public order, and, the associated “race relations industry”.

The discussant questions calls for the involvement of NGOs in the management of migration matters, arguing that such institutions pursue not the public good, but their own agendas, including aims related to their own preservation, growth and power.

Finally, Coleman specifies his understanding of integration policy. Since immigrants move by their own choice, they should adapt to the country they have chosen. This can not only mean to enjoy the right to move freely in the economic or physical space of the host country, but must include the obligation to assimilate to national norms and other forms of behaviour, including separation of church and state, freedom of speech in all matters, including religion and its rejection, equality for women and tolerance for sexual minorities, treatment of animals and conservation of the environment. A contract to be signed by new immigrants might be an instrument, setting out their obligations as well as informing them of their rights in the host country.

Integration Research in a European Perspective

Friedrich Heckmann (University of Bamberg) first defines the concept of integration in the context of immigration as the inclusion of new populations into existing social structures and the quality and manner in which these new populations are connected to the existing system of socio-economic, legal and cultural relations. He distinguishes four dimensions of integration:

- structural integration: the acquisition of rights and the access to positions and statuses in the core institutions of the receiving society by the immigrants and their descendants;
- cultural integration: processes of cognitive, cultural, behavioural and attitudinal change of individuals;
- social integration: peoples’ private relations, group and associational memberships;

- identificational integration: membership in a new society is shown in feelings of belonging and identification.

In summary: “Integration means an acquisition of rights, access to positions and statuses, a change in individual characteristics, a building of social relations and a formation of feelings of belonging and identification by immigrants towards the immigration society.”

Next, the author focuses on the population groups studied in integration research: people who have the intention of staying in a particular country. The most frequently studied group in integration research is the so-called second generation of migrants (the cohort of children of the original migrants). By comparing the second generation with the first and with similar age cohorts of natives, it can best be found out whether a process of becoming similar or of differences becoming smaller between the migrant group’s descendants and the receiving society is under way, or whether there is a tendency of reinforcing ethnic boundaries and separate identities. Other categories that can be studied are: foreigners, foreign-born, returnees, immigrant ethnic and racial minorities.

Further, the author discusses the research design and measurement for studying integration in comparative European research projects. Two kinds of research design are suited for integration research: representative panel or cross-sectional studies which can measure the on-going integration process and group-comparing designs that allow to compare the same indicators for migrants and natives. The EFFNATIS project, aimed at comparing integration in France, Great Britain and Germany, is given as example.

A substantial part of Heckmann’s presentation deals with the major theoretical attempts to explain different kinds and degrees of integration. Subsequently the stage model, theories starting from the characteristics of the receiving society (the prejudice-discrimination approach, the disintegration theory, the national difference paradigm), theories starting from characteristics of the immigrant group (culture and identity conflict theory, anomie hypotheses, ethnic mobility trap hypothesis, family resource paradigm, ethnicity paradigm, and gender paradigm), and Esser’s integrating rational choice approach are discussed. The author stresses that these theories are not necessarily mutually exclusive, but they do try to explain different phenomena and base their assumptions on different starting points.

Next, the author describes the different patterns of incorporation of migrants and their possible outcomes on a macro-societal level: integration, ethnic minority formation, racial exclusion, dual labour market, ethnic enclave economy, and ethnic stratification models. The author is of the opinion that integration seems to be the most valuable kind of ethnic incorporation, since the outcomes of the other patterns result into forms of social inequality which can be assumed to be in opposition to the immigrants’ main goal and motive for migration, namely opportunities for social mobility in the host society.

In conclusion Heckmann formulates some recommendations for the improvement of statistics and research at the European level:

- the term “integration” should be preferred above the use of the term “assimilation” since the latter evokes aggressive motives and provokes misunderstanding;
- the study of foreigners becomes increasingly obsolete. With the increasing number of naturalisations in Europe, it is necessary to introduce a statistic of migration status (for example, foreign-born);
- the migration status or migrants’ origin should also be measured in the second and third generations;
- an internationally comparable panel or cross-sectional surveys should be institutionalised to investigate the integration process of migrant groups;
- those surveys should include sections on all four dimensions of integration: structural, social, cultural and identificational integration.

Although he is largely in agreement with the basic tenets of Heckmann's presentation, discussant Raimondo Cagiano de Azevedo (University "La Sapienza", Rome) raises several theoretical and methodological issues with respect to the integration of migrants.

He argues that integration theories find their origins in different scientific fields, - some of them in physics, others in statistics or sociology - but he esteems that, in general, we are still lacking solid theories applicable to different social experiences.

Next, the discussant draws the attention to the importance of the political choice – namely the logic of the integration process can build on the approach of 'equality' or 'minority' – for the choice of the variables and of the statistical instruments in measuring the integration process. He is also of the opinion that integration should be analysed in its different forms, from the very negative ones (e.g. integration in criminal organisations) to the most positive ones (e.g. integration of values and estimated differently in delinquencies, employment, education, etc.). He opts for a systematic approach where integration is less a sum of individual mechanisms and more a dynamic system of a number of relationships.

As far as concerns the measurement of migrant integration the importance of the choice of the relevant variables and the statistical instruments and methods is emphasised. This choice depends a.o. on goals, available data, and the context of migrants' integration.

Further, the discussant stresses the necessity for new European policies on migrant integration based on an explicit acceptance of migrants in the receiving countries. He stresses that this policy will require a new form of co-operation between sending and receiving countries. A new European approach in accepting and planning regular migration flows should also establish concrete prerequisites for successful integration.

Cagiano concludes with some additional suggestions for future research. Notwithstanding the progress made in the field of migration studies, there remains a need for new and better basic statistical data. Also there is an urgent need for internationally comparable and usable basic and composite migrant integration indicators. Demographic variables are of central importance in the building integration measures.

Topical reports

The Norwegian Survey: Living Conditions among Immigrants 1996

Lars Østby (Statistics Norway, Oslo) presented the aims, methods and general results of the Norwegian Survey, the main goal of which was to gather data on all the main aspects of the living conditions of immigrants to be compared with information on the total population in Norway. The survey is based on the collection of social statistics from different administrative registers. A representative sample of immigrants from eight countries was drawn, and more than 2,500 persons interviewed.

Information on country of birth, language, housing conditions, internal migration in Norway, plans for the future, household composition, education, voluntary (unpaid) work, labour market activity, working environment, unemployment, economic conditions, health, violence and jeopardy, social contacts, help to neighbours, and use of free time has been collected. The interview data were also completed with data from registers.

Differences between immigrants and natives (Norwegians) are described for educational level, level of unemployment, income disparities, housing, and health. The research focuses on the integration of immigrants as well. It is emphasized that the Norwegian immigration authorities are interested in this kind of surveys, and they are active in financing data collection and analyses.

Disintegration, anomie and adaptational patterns of second-generation immigrants in Switzerland

Hans-Joachim Hoffmann-Nowotny, Oliver Hämmig, and Jörg Stolz (Sociological Institute of the University of Zürich) presented the theoretical background and main findings of a Swiss survey on second-generation immigrants. This investigation focuses on analysing the structural disadvantages and choices in the adaptation patterns of second-generation immigrants in Switzerland. The survey was carried out with young second-generation Turks and Italians and with a Swiss control group of the same age in 1997. The research is based on anomie theory. The concepts of social structure, structural integration, deprivation anomie, and orientational anomie, as well as the adaptation patterns (the perception of discrimination, the motivation to segregate, and the prospect of remigration) of second-generation immigrants are described.

The analysis of the statistical data shows that the members of the second generation of the Italian and Turkish communities are in a disadvantageous position in comparison to the Swiss control group and have more structural disintegration and anomie. Analysing school education, post-school education, and occupational status, one can observe that lower socio-structural positions lead to higher anomie of deprivation, but also to higher orientational anomie. It is emphasized that nationalities have a significant effect: for example, it was established that the Turkish group is more characterised by deprivational anomie and the Italian group by orientational anomie.

Summarising the results from the determinants of both types of anomie, it is found that lower status positions lead to a higher degree of anomie. The variable gender also has a significant role in the perception of discrimination: young women feel less discriminated against and are less likely than men to want to return to the country of origin of their parents.

The authors conclude that the hypothesis that structural disadvantage leads (through individual anomie) to different forms of “re-ethnicizing” adaptation is confirmed by their data.

The family formation and value patterns (FFVP) and migration history and social mobility (MHSM) surveys among Turkish and Moroccan populations in Belgium

Ron Lesthaeghe (Interface Demography, Vrije Universiteit Brussel) focuses on the methodology of the two surveys - sample design techniques, data collection, and the organization of the fieldwork - conducted in 1991-1996. Both surveys are based on cluster samples with a two stage drawing procedure, and the sampling of individuals was done on the basis of the list of foreign population. The organization of both surveys and the course of fieldwork are described in detail, and the specific interview problems in the Turkish and Moroccan communities highlighted. The approach to community-sensitive questions concerning contraception and abortion, taking into account Islamic traditions, is discussed. The different reactions to these questions by Turkish and Moroccan respondents are compared.

It appeared that the researchers needed to monitor the fieldwork themselves in order to organize quick interventions when needed, to get immediate feedback from interviewers, and to enhance their sensitivity to patterns of community organization that are essential ingredients for subsequent interpretation.

The research on demographic and cultural specificity and integration of migrants in the national population institutes in Europe

The reports of the NIEPS partners and the three invited non-NIEPS-members which were supposed to give an overview of the migration research in their respective institutions show a certain variation in their contents: some institutions limited their presentation to their own

(recent) research projects and report on the scope, methods and results of their investigations; others took a broader view and reported also on important research going on in other national or university institution specialised in migration research in their country. Several reports also give a comprehensive overview of the demographics of migration in their country. All reports include an extensive bibliography (NIEPS, 2001).

A first observation is that all national population institutes in Europe do include one or more migration studies in their research programmes. The migration research activities of the national population institutes in most cases goes far beyond the classical recording of the demographic dynamics and the analysis of demographic registration data (vital statistics or census analysis) on stocks and flows of migrants, types of migration, and migration forecasts.

Virtually all national population institutes in Europe undertake, in addition to the usual monitoring of the demographic dynamics, special studies on migration. In most cases these studies include specialised sample surveys on migration issues. In some cases they are surveys on attitudes of the national population towards migrants and migration (e.g. Austria, Germany, Finland, Hungary, Estonia, Italy) in other cases sample surveys on the demographic behaviour and or living conditions of particular migrant populations (e.g. Belgium, Germany, Norway, Switzerland). In a few countries use is made of linked administrative population registers or census rounds to gather information on migrants (e.g. Norway, Poland), however complemented with special interview surveys (e.g. Norway). Several countries made use of the migration module of international comparative surveys such as the Population Policy Acceptance Survey (PPA) (e.g. Austria, Italy) or the Fertility and Family Survey (FFS) (e.g. Estonia, Latvia) or plan to introduce a migration module in new envisaged international comparative surveys such as the second Population Policy Acceptance Survey (PPAS) (e.g. Finland, Poland), the Labour Force Survey (LFS) (e.g. Poland). International comparison will also be possible in cases where the same type of survey questionnaire has been used (e.g. Austria, Germany, Switzerland). A few institutes studied also their own emigrants abroad (e.g. Finland, Poland). In several cases both specific migrant populations and the native population as control group are compared or several generations of migrants are studied. Most surveys use standardised questionnaires, but a few institutes also apply qualitative survey methodologies and record narratives of migrants (e.g. Hungary), or work with focus groups (e.g. Belgium).

The national population institutes study a broad variety of migration issues. Basic studies concern the demographic behaviour - partnership, fertility, family planning – (e.g. Belgium) and socio-economic living conditions of migrants and their descendants (e.g. Finland, Norway, Switzerland). In several Eastern European countries special surveys on ethnic minorities are undertaken (e.g. Estonia, Hungary, Latvia). In a few countries also return migration has been studied (e.g. Czechia, Poland). Many countries have undertaken attitudinal surveys towards migrants and foreigners, including attitudes on racism, ethnocentrism and xenophobia and their relationship to life management (e.g. Austria, Czechia, Finland, Hungary, Italy). In some cases this type of survey has been repeated several times allowing the study of changing attitudes over time (e.g. Finland, Italy). Some countries also undertake special surveys on attitudes, viewpoints and values of migrants themselves (e.g. Belgium, Hungary). More recent surveys on the integration of migrants started to be developed (e.g. Estonia, Germany, Poland, Switzerland). Sometimes only specific aspects of integration such as the accessibility to regular welfare services for migrants are studied (e.g. Belgium). Some countries pay particular attention to the life course of migrants (e.g. Estonia). In many cases several of the above mentioned topics are studied in multipurpose surveys, in which demographic behaviour, socio-economic living conditions, attitudes and values, integration and migration policy issues are dealt with (e.g. Germany). A few institutes also undertake multi-country research on determinants of migration (e.g. Hungary, Latvia, Netherlands, Poland). In some countries (e.g. Poland) policy issues are systematically followed or are included in the attitudinal surveys.

With the exception of the migration modules of the PPA, PPAS and FFS no international comparative survey instruments on migrants have been developed so far, although a few countries largely use the same type of questionnaire in their integration or attitudinal surveys.

Whereas it is quite evident that national population institutes study migration trends and migration policy, one can wonder why they pay now also more and more attention to migration integration, a subject which is, at least in a number of countries, also studied by specialised sociological or ethnological/anthropological institutes. What is the specific contribution of population research to integration research?

A simple answer might be that integration research has not yet been taken up by sociological or ethnological/anthropological institutes in the country and that (the national) population centre(s) fill up an existing gap. Another answer relates to the fact that population institutes will obviously concentrate on the demographic aspects of integration. There is, however, a more fundamental reason. (National) population institutes not only have to study population dynamics, i.e. the development and change of the size and composition of the nation's population, but need also to focus on policies that directly or indirectly influence the size, structure and composition of the population. Integration (or non-integration) of migrants undoubtedly influences the population in structure and intergenerational change. Moreover, population research becomes more and more encompassing than the traditional description and analysis of demographic statistics. It evolves in the direction of a multidisciplinary science and deals more and more with the deeper lying causes and determinants and with the societal consequences of population changes. In that perspective, integration research is a perfectly legitimate topic in the research programme of (national) population institute(s).

The NIEPS partners reported on the following research activities in the domain of demographic and cultural specificity and integration of migrants:

Population and Family Study Centre (CBGS), Belgium

Research into migrant issues has formed part of the CBGS programme since 1988. Selected past and ongoing CBGS studies on migrants are described in the report. It focuses on social and demographic changes among Turks and Moroccans, accounted for one in four of all foreigners in Belgium. The report is restricted to two main research projects:

- 1) Accessibility to regular welfare services for migrants;
- 2) Monitoring the changes in demographic behaviour, with special attention to marriage, family formation, fertility, desired number of children, contraceptive behaviour, and abortion.

CBGS analysed many aspects of the accessibility of regular social services for migrants. The screening of migrant organisations and the creation of a database with an overview of services and initiatives of and for migrants have been used for proposals to improve the provision of services to different migrant groups, for example for elderly migrants.

CBGS has a long tradition in family formation and fertility studies. Since 1992 CBGS has realised several studies on family and fertility related to the behaviour of Turkish and Moroccan women. In the report different data sources applied to this work are described, including the Belgium population censuses of 1981 and 1991 and the Fertility and Family survey among the Turkish and Moroccan communities in 1992 and 1993.

The report informs about changes in family formation in the Turkish and Moroccan communities and gives evidence that fertility is declining. An increase in the age of first marriage, the delay of childbearing and a desire to postpone family formation within marriage for most of women, and the use of contraceptives characterise modern behaviour. The research points out that behavioural changes differ according

to level of education and migrant generation. The author stresses that the new environment obviously has an impact on demographic behaviour of migrant women.

Further the report gives short descriptions of the use of different contraceptive methods and their effectiveness in the Moroccan community, showing that many women are still confronted with unintended or unwanted pregnancies. It thus appears that many women are using the contraceptive methods incorrectly. In light of a special study among thirty-two married Moroccan women, policymaking recommendations were put forward and some suggestions for improving assistance by family doctors were made.

Opinions of unmarried second-generation Moroccan youngsters about marriage partners and sexuality are analysed. There exists a strong aversion to interethnic marriages, and the influence of most parents is very strong; however, a trend towards a greater participation of boys and girls in the choice of marriage partners and some other traits show that there are changes in traditional marriage customs.

Federal Institute for Population Research (BiB), Germany

The BIB report focuses on a specific project on the integration of foreigners in Germany. The starting point of this paper draws attention to shortcomings in terms of the second generation integration of foreigners. Most of them were born in Germany, and they have been through their socialisation there. They were not expected to become integrated, nor were they offered integration programs.

The report compares the *assimilation model* and *segmentation model* of integration in the pre-war period. The background causes and contents of the ethnic revival attitudes are considered. The author concludes that neither of these models depicts reality with success.

In the survey 3,600 young adults of both genders of Turkish, Italian, and German nationalities participated. These are the main population groups of foreign origin in a second generation. Turks are considered to be the ethnic group culturally most distant from all larger groups of foreigners in Germany. Italians are the group of foreigners in Germany having a culture relatively close to that of the host society, while being at the same time the oldest immigration cohort. Germans serve as a control group. It is stressed that the last questionnaire repeats whole groups of topics and series of questions; it contains basic socio-demographic and socio-structural data on migration.

The report mainly dwells on the BIB survey in progress. Similarities and differences between this survey and other surveys are compared, especially with the survey of the German Youth Institute (DJI) in Munich.

Netherlands Interdisciplinary Demographic Institute (NIDI), the Netherlands

This report concentrates on the project to study the push and pull factors determining international migration flows. The objective of the study is to improve understanding of the direct and indirect causes and mechanisms of international migration to the European Union, from an internationally comparable perspective. The results are used to serve as a basis for the development of policy instruments and to provide tools for estimating future migration. As predominantly migrant-sending countries in the project are Turkey, Morocco, Egypt, Senegal, and Ghana; Italy and Spain are selected as receiving countries.

The survey is organised at micro and macro levels for the collection of data on individual, household, and contextual factors that influence people's decisions to move or stay. The non-

migrants are incorporated in studies in order to explain the determinants of migration and to better understand why the majority of people do not migrate. Characteristics of households, motives, and main countries of destination are given for the recent international migrant groups. The main reasons for emigration for different nationalities by sex in receiving countries are compared.

In the report a description is given of which kind of information the migrants have on the country of destination before they migrate and which kind of sources they use. It is stressed that there is better information on economic topics and little knowledge on admission regulations. The Mediterranean region and Sub-Saharan Africa sending countries show many similarities with regard to motives for leaving the origin country and choosing a particular country of destination. Some particulars on undocumented migration from sending countries are analysed; there is clear evidence that undocumented migrants have networks.

Migration intentions and potentials in sending countries differ from country to country, and demographic characteristics of migrants are described in the context of their reasons. According to the surveys general migration intentions are between 14% and 42%; in fact far fewer people consider that they will actually emigrate within the next two years (more from Ghana and Senegal). The results indicate that most people prefer to move to a certain country for economic reasons, but when it comes to the actual move, family-related reasons determine the choice of the country.

Population Research Institute (PRI), Finland

The report gives an overview of the migration trends in Finland after the Second World War. It is stressed that historically Finland has mainly been a country of net emigration, and only since the 1980s has immigration dominated. The main groups of foreign population living in Finland are people with Finnish roots, spouses of Finnish citizens, refugees and their family members, and labour migrants.

Finnish migration studies in different periods are also considered in the report. The main approaches and topics of these studies are analysed: in the 1960s research on Finns living in North America, in the 1970s studies conducted on migration between Finland and Sweden, in the late 1980s studies related to Finnish attitudes towards immigrants and immigration, in the mid-1990s an investigation on new minorities living in Finland, and present studies focus on integration and the cultural interaction of migrants.

The surveys on attitudes towards immigration and immigrants from 1989 and 1998 are considered. The objective of the study was to describe Finnish attitudes towards the foreign population in 1998 and in the past in order to show how these attitudes have changed during the recession and after the number of foreigners increased. Attitudes on a variety of topics are compared: towards the reasons for immigrating, towards foreign job seekers, towards refugees' perceived competition for jobs and social benefits as well as standards of living, towards groups of different nationalities, and on self-assessed racism and supporting racist attitudes.

The focus of the 1996 survey was to study the Finnish attitudes towards immigrants in Finland in the mid-1990s. They present different attitude models and the connection between life management and attitudes towards immigration. Söderling comes to the conclusion that the lack of external life management (low income and low level of education) is strongly related to negative attitudes towards foreigners. The author indicates that the attitude surveys have gained a remarkable role in Finnish immigration research, and it will continue to be so in the future.

Department of Demography and Geodemography (KDGD), Czech Republic

The report outlines the research activities in international migration issues in the Czech Republic during the 1990s. The focus of the investigation is immigrants and their integration in the country. The research activities of three important centres are mentioned:

1. Department of Social Geography and Regional Development, Faculty of Science, Charles University, Prague;
2. The Research Institute for Labour and Social Affairs;
3. The Institute of Ethnology of the Academy of Sciences of the Czech Republic.

The international migration issue is outlined and analysed through sociogeographic, sociological, and ethnographic perspectives.

The current migration situation, processes, and the largest migrant groups in Czech Republic are analysed in the report. The immigration patterns have been influenced by changes in the socio-economic situation in the country, and they differ through three periods during the 1990s (1990-1992, 1993-1996 and from 1997 onward). The report focuses on the following aspects: the general characterisation of the situation in international migration, studies of the situation of asylum seekers and refugees, analyses of the adaptation/integration process of migrants, studies of Czech re-emigration groups, the immigrants' positions in the domestic labour market, public opinion on migration, and issues of the improvement of migration statistics.

Institute for Demography (IFD) of the Austrian Academy of Sciences, Austria

The report outlines two studies that have been carried out during the 1990s. Main topics of both studies are the attitudes and opinions of the Austrian population in respect to international migration, foreign population, and migration and integration policy in Austria. They are based on representative surveys comprising 1,500 and 2,000 people.

The first study by Werner Holzer and Rainer Münz was part of the international research project "*Population and Welfare: A Comparative Survey on the Acceptance of Population Related Policies in Europe (PPA)*". The survey itself goes back to the year 1992. The second study by Gustav Lebhart and Rainer Münz "*Xenophobia in Austria*" was published in 1999 based on a survey in 1998.

The analysis shows the ambivalent attitude towards foreigners already living in Austria and potential new immigrants; this is determined by humanitarian demands on the one hand and prejudices on the other. It was found that attitudes and opinions differ - on some points considerably - among social groups. Restrictive attitudes and xenophobic tendencies are much more common among older people, in the countryside, and among Austrians who don't have any contact with migrants.

Estonian Interuniversity Population Research Centre (EKDK), Estonia

In this review the processes of international migration in Estonia and the changes of population composition influenced by them are examined, and the population of foreign origins is characterised. Estonia after WW II turned into an immigration country, and in Estonia two major waves of immigration with diverse compositions of migrants can be distinguished: the immediate post war decade and the late 1960s and 1970s. In the report special attention is paid to the analysis of the population of foreign origin and the methods of data acquisition. The characteristics of population composition that have developed under the influence of migration are described.

Extensive flows of international migration have resulted in the formation of a large population of foreign origin; its proportion is one of the highest in Europe. The heterogeneity of the foreign-born population is characterized by 1) the differences by age structure, 2) the composition of their home region, 3) the ethnical structure, 4) the language and the knowledge of the local language, and 5) religious affiliation and other diversities. Summarizing the results of research, the authors emphasize that it might be concluded that

there is no clear evidence of convergence of behavioural patterns in demographic processes, which in turn affect the development of various other social processes. For that reason the average for the total population in Estonia tends to be meaningless, representing only the mechanical aggregation of the two different populations.

The research on population of foreign origin and national minorities is described, and it indicates that the Estonian population of foreign origin has been part of all nationally representative surveys in the 1990s, but the differentiation between the immigrant and native populations had not been statistically documented during the Soviet regime due to ideological considerations. In surveys the need to distinguish the first and second generation among the population of foreign origin is also stressed. The Estonian experience with thematic modules could contribute to the integrated survey, particularly in two directions: migration/housing and parental home modules.

On the basis of the FFS survey project, and more in particular its migration module, the following relevant aspects can be characterised: the migration career since completing primary education, the housing career and long-distance and short-distance residential moves; the module enables to identify the key actor in residential moves, frequently involving the whole family/household. With respect to residential moves the intergenerational dependency is of particular interest, because it includes the important aspect of kinship networking.

The analysis of the parental home as an immediate socialisation environment shows that in Estonia the second generation of the immigrant population follows the behaviour patterns of the country of origin rather than the country of residence. It could be explained by the high segregation of immigrants in the previous decades, which secured the transfer of behavioural patterns brought along from the country of origin through their parental home. The authors emphasize that this information is also significant from the population policy perspective, especially for the integration of foreign-origin population.

Finally a special survey on national minorities is described that is methodologically based on the life course approach. The survey does collect information on processes specifically important to national minorities such as mixed marriages, inter-generational and intra-generational changes in language, religious affiliation, and ethnic self-identification. The authors stress that the methodological experience gained during this survey may also be of relevance to other countries with distinct minority populations.

Demographic Research Institute (DRI), Hungary

The report highlights the overall status of research on international migration in Hungary and describes migration processes during the 1990s. Currently the country is a receiving country after being a sending one for almost seventy years. The ethnic character of immigration is striking; immigrants are predominantly ethnic Hungarians.

Statistics on international migration in the 1990s are summarised. The data on the stock of immigrants and emigrants as well as refugees are analysed. Specific characteristics of migration patterns and migrant groups are represented. The report draws attention to the fact that the dynamics of international migration flows in Hungary follow approximately the overall European patterns. In the last years the amount of migration has had a slight tendency to decline.

Integration, cultural patterns, and attitudes towards migrants are important topics in research carried out in Hungary. Most of the projects have focused on attitudes towards foreigners and aliens, and the author stresses that these attitudes are relatively stable. The report also concentrates on analyses of the narratives of migrants in the Transylvania-Hungary-Austria triangle. In the last few years the focus of research has been on the analysis of migration from the point of view of the migrants. The reorientation of the focus of research and the attempt

to 'rewrite' the analysis of migration from the point of view of the migrants are the main approaches of these studies.

Finally, some gaps in the research on international migration and in the statistical and demographic data concerning migrants are pointed out.

Centre of Demography, University of Latvia (CDL), Latvia

The report outlines changes in the direction and intensity of migration in Latvia during the 1990s. The important role of the integration of former Soviet citizens and stateless persons is emphasized because Latvia belongs to countries with a very high proportion of non-titular ethnicities and foreign-born persons as well as non-citizens (about 25%). The current naturalization and societal integration processes are described.

The past and ongoing research activities on migration trends and changes in ethnic structure in the country tracked by the CDL are characterised. The analytical reviews on these issues have been prepared since the mid-1990s. The special surveys on migration carried out by other Latvian research and governmental institutions are highlighted: Central Statistical Bureau, Bureau of Citizenship and Migration, Baltic Data House, Department of Human Geography of the University of Latvia, the research team on population studies of the Institute of Economics, Institute of Philosophy and Sociology, and Ethnic Studies Centre.

The latest research (2000) of the Department of Human Geography within the international research project "Socio-economic and political mechanisms of population migration in the republics of the former Soviet Union" has been done with the support of the Open Foundation in the framework of the Research Support Scheme. The major aim of this project is to provide an international comparative study of socio-economic conditions and migration preferences of non-indigenous, i.e. mainly Russian-speaking populations of the three former republics that have negative migration balances with Russia (Kazakhstan, Ukraine, and Latvia). A statistical analysis of the socio-economic conditions and migration flows in Latvia, a comparative study of the political and legal situation by analysis of existing laws and regulations and their implementation, a survey of experts on migration, and a survey of potential migrants have been carried out.

A special migration module was included in the questionnaire of the Latvian Fertility and Family Survey in 1995, which gave the possibility to analyse differences between immigrants and native population in several spheres of demographic behaviour.

CDL is responsible for the preparation of national demographic projections in Latvia. Making these projections in 1993 and 1998 for 2025, the CDL analysed long-term and recent trends in internal migration among districts and major cities and immigration and emigration processes. In order to include more credible assumption estimates, a special survey of experts on their opinions concerning migration was carried out in the last years.

In the 2000 census questionnaire there was a question on the place of residence one year before the time of the census (31 March 1999). It gave the possibility of obtaining significant information about international and internal migration.

The report gives descriptions of some non-academic projects elaborated with IOM assistance: on voluntary return of migrants, social assistance at the foreigner reception centres, on the improvement of the migration management systems, on institutional strengthening, and migration prevention of trafficking in women.

Institute of Statistics and Demography (ISD), Poland

The leading institution conducting research in international migration is the Centre for Migration Research (CMR) of the Institute of Social Studies at Warsaw University. The

interdisciplinary group of researchers focuses on international population movements, migrant integration, ethnic relations, and migration policy. The CMR also serves as a consulting body to various institutions.

The research focus of the Institute for Labour and Social Affairs is on issues of labour-related international migration. The Silesian Institute in Opole is mainly interested in the regional dimension of mobility, in particular the consequences of migration in Upper and Opole Silesia. The Institute of Geography and Spatial Organisation of the Polish Academy of Sciences focuses on the issue of migration change after enlargement of the European Union. Researchers from the Jagiellonian University conduct studies on the sociological, social, and demographic aspects of migration.

Research in migration and integration is carried out in many fields, but the more characteristic of them are:

- identification of the size and structure of emigration to and from Poland and the stocks of foreigners in Poland as well as Poles abroad, geographical patterns of migration, and the main destinations for Polish migrants;
- mechanisms and types of international and internal migration;
- forecasts of emigration from Poland in the light of the future enlargement of the EU;
- problems of brain drain and brain gain;
- integration and assimilation of Polish migrants abroad;
- integration and assimilation of immigrants in Poland;
- migration policies.

Finally, the authors stress that the registration system for international migration in Poland is highly unsatisfactory and has to be changed. Many research gaps and challenges for further research activities are highlighted in the report, emphasizing that the National Census in 2002 will include a special expanded form for all migrants, internal and international.

The Second Workshop on demographic and cultural specificity of migrants

This Workshop was organised by the Population Research Institute /Väestöliitto, Helsinki, Finland and was held in Helsinki on 22-23 March 2002.

The Workshop had as main objectives to concentrate on migration and integration policies and to reflect on possible future co-operative research on the basis of the report of the group in charge of developing a comparative survey on migration and integration of migrants.

The discussions at the Workshop were introduced by four solicited presentations, each followed by comments of a discussant. The solicited papers and comments dealt with:

- An Overview and Comparison of the State of Migration in Different European Countries. (presentation by Michel Poulain, Université Catholique de Louvain, Louvain-La-Neuve, Belgium and discussed by Charlotte Höhn, Federal Institute for Population Research, Wiesbaden, Germany);
- Immigration and Integration of Migrants from the Magreb Area in some European Countries – Challenges for Future Research (presentation by Youssef Courbage, Institut national d'études démographiques, Paris, France and discussed by Kalev Katus, Estonian Interuniversity Population Research Centre, Tallinn, Estonia)
- Future Immigration to the EU in the Context of the Eastern Enlargement and Mediterranean Cooperation (presentation by Jonas Widgren, International Centre for Migration Policy Development, Vienna, Austria and discussed by Lars Østby, Statistics Norway, Oslo, Norway);

- Integration Policies in the Transition Countries: Estonia and its Integration Policy in the EU Context (presentation by Raivo Vetik, Institute of International and Social Studies at Tallinn Pedagogical University, Tallinn, Estonia).

The discussions on possible future cooperation in the field of migration and integration research was introduced by Christiane Hintermann (formerly Institute for Demography, Austrian Academy of Sciences, Vienna) who drafted the report of the Technical Meeting which was held in Vienna on 15-17 February 2001.

The executive report on the Workshop was prepared by Kalef Katus (Estonian Interuniversity Population Research Centre, Tallinn, Estonia). The proceedings of the Workshop were published by the Population Research Institute (Söderling, 2003).

Overview and comparison of the state of migration in different European countries.

Michel Poulain (Catholic University of Louvain-la-Neuve) provided an overview of the developments in immigrant populations and migration processes in Europe.

In his introduction, the author stresses the importance of adequate and reliable data on migration as well as appropriate analysis methods as a guide to policymakers in formulating a common European migration policy and evaluating the efficiency of political responses.

The paper starts with a brief discussion of the reliability and comparability of migration statistics gathered by the EU countries and compiled in the New Chronos database (EUROSTAT), separately for stock and flow data. The data on the stock of foreign population, derived from the censuses and based currently on the citizenship criterion, are considered more reliable, although foreign populations living in EU countries are still under-registered. Indirect estimations referred by the author indicate a substantial difference in the degree of under-registration across Europe, being lower in north-western and higher in southern countries. The reliability and, hence, the potential for international comparisons on the basis of flow data is clearly weaker, first of all due to variation in the criteria for defining migrants across countries as well as the completeness of registration. There is an indispensable need for data harmonisation in the field of migration statistics.

In the analysis of the stock of foreign population the author applies complementary approaches, both from the perspective of receiving and sending countries. The results are presented separately for foreign EU and foreign non-EU populations. Although there has been some increase in the numbers over the past decade, on average the proportion of EU citizens living in another country remains relatively low (1.55% in the year 2000).

The highest proportion of non-national EU citizens can be found in Luxembourg and Belgium, reflecting their special position in Europe; the lowest proportions are in southern countries such as Greece, Italy and Portugal, and in Finland. On another hand, Irish citizens, followed by Portuguese and Greeks are most often residing in another EU country. Following closely their patterns of long-term demographic development, the synthesis of the two perspectives — foreign population living in the country and citizens living abroad — clearly distinguished between the countries which have gained/lost population due to migration within the EU.

The analysis of the non-EU population stock in EU covered Norway, Switzerland, ten EU candidate countries, Russia, the Ex-Yugoslav republics as well as the major sending countries beyond the European region. Consistent with the demographic pressures that exist in many of those countries, particularly in those belonging to the developing world, the growth of the non-EU population has continued to outpace the increase of EU nationals residing in another member country. In absolute terms, the foreign non-EU population outnumbers the foreign EU population more than twice. In most countries the stock of foreign population is

dominated by immigrants from beyond the EU. Adding the two groups, in Austria, Belgium and Germany the foreign population accounts for nearly one tenth of the total population.

In examining the origin of the foreign population, the author addresses the selectivity of migration and numerous links among countries, both within EU and beyond, based on geographical, historical and cultural proximity as well as other factors. From the methodological point of view, the author points to the need to consider the trends in naturalisations which exert considerable influence on the size of the foreign population.

Regarding flow statistics, the author compares international immigration flows to EU countries in two five-year periods, 1990-1994 and 1995-1999, by citizenship and country of destination of immigrants. Return migrations of nationals are not considered in the analysis. Comparing the early and late 1990s, the examination of migration flows reveals some decrease in the absolute number of non-EU immigrants and increase in the EU-immigrants to EU countries. Nevertheless, more than three fourth of international immigrants to EU countries continue to arrive from outside the Union.

Discussant Charlotte Höhn (Federal Institute for Population Research - BiB (Wiesbaden)) acknowledged the large amount of information collected and addressed in the paper, covering the stock of foreign population and international migration flows on the one hand, and different time-points on the other. Also, the discussant positively remarked the appropriate way of analyses, undertaken by the author.

Regarding policy-relevant aspects of the presentation, the discussant underlined the importance of an objective, scholarly approach avoiding value judgements and dramatic expressions on the theme. However, the discussant critically remarked the insufficient attention paid to the elucidation of the policy implications arising from the substantive findings in the paper. In her opinion, a clearer articulation of these implications could facilitate the use of the results by policymakers and contribute to a more qualified public debate.

The discussant's major methodological criticism focused on the concept of foreigners that is defined in the paper on the basis of citizenship criteria. Höhn characterises such definition of foreigners as "confusing, loose and obsolete" and draws attention to various deficiencies of the adopted approach. According to her, the application of citizenship criteria does not allow to distinguish the rapidly growing second generation of immigrants whose integration forms a major concern in many European countries. The discussant also points to several other groups belonging to the immigrant population but are not considered as foreigners, including the persons engaged in colonial civil service in the countries with colonial background, descendants of emigrants returning to their home country after living abroad during several generations, etc. All the referred groups face serious, and often specific problems when integrating into the host society.

As an alternative to citizenship criteria, the discussant recommends the place/country of birth, preferably also extended to the parental generation. As an illustration of analytical possibilities opened by such an approach, reference is made to the paper by Lars Østby (2000) presented in the first workshop of NIEPS on the demographic and cultural specificity and integration of migrants. Such data are collected by many countries and should be requested from institutions responsible for compiling and maintaining international databases. This would allow to broaden the focus from foreign citizens to foreign origin population in its entirety.

The meeting went a step further and suggested that one should look at the population with an immigrant background. Inquiring about the self-perceived cultural or ethnic identity might be another information useful for the sociological study and policy implications of the presence of people of alien origin and their degree of assimilation, integration or insertion in the national population.

Finally, the discussant pointed to the need to cover more explicitly also the state of integration of immigrants. Examples are labour market characteristics, educational attainment and qualifications, housing condition and spatial distribution but also ideational dimensions that can serve as important markers of the position of immigrants. Such information could be derived from census and survey statistics to reflect the degree to which different groups of the foreign origin population may be disadvantaged. In a comparative perspective such a perspective would contribute to the identification of best practices in the field of integration.

Immigration and integration of migrants from the Maghreb in some European countries – challenges for future research

The introductory paper by Youssef Courbage (INED, Paris) was devoted to the analysis of the Maghreb origin population in EU countries. The focus of the paper is on the integration of immigrants, by different origin as well as across EU countries. Also, emphasis is placed on challenges of research of foreign origin populations in Europe, on the background of the current situation and on future trends.

In his introduction, the author points out that Maghreb immigration to Europe has been rather marginal in absolute numbers, compared to the population size in North Africa and/or its rate of increase. Nevertheless, the issue has aroused much interest in Europe and there is evidently a growing need for research on the topic, including among others the integration patterns.

A short presentation of the number of the population of Maghreb origin in the EU is followed by the analysis of its demographic and socio-economic integration. In the final part of the paper the author discussed the future research requirements and challenges, including the need to develop a general methodology for the demographic analysis of foreign origin populations and their integration to host societies.

The author has assembled the available information on Maghreb immigrants in various European countries, with an attempt to present them on a comparable basis. Still, the number of Maghreb immigrants in Europe could be estimated only with by approximation, even in terms of absolute numbers, showing the need for a common concept to be used for defining immigrant populations in general, and those from Maghreb in particular. The concept of citizenship has proved to be rather inadequate for the latter purpose, especially for the study of integration processes, and should be replaced (or paralleled) by the concept of origin.

Proceeding to demographic and socio-economic aspects of integration of the Maghreb origin population, which is the main focus of the paper, the author analyses the integration/disintegration of Maghreb immigrants in different European countries first by a number of demographic characteristics and processes: mortality and causes of death, fertility, nuptiality, household structures, age and sex structure. Next he analyses a number of socio-economic characteristics: schooling and educational attainment, labour force participation and unemployment.

Concerning mortality patterns, Courbage shows that Maghreb immigrants tend to be characterised by lower mortality compared to natives, particularly in France. The mortality level of immigrants is much lower compared to the one in the countries of their origin. One of the explanations is selectivity, as people in ill health are less likely to emigrate from the country. However, Courbage suggests that also additional explanatory factors, such as a healthier lifestyle of Maghreb immigrants may play a role.

In most European countries higher fertility levels are typical among immigrants from developing countries and the Maghreb origin populations do not form an exception. Nevertheless, fertility levels have been rather quickly approaching the average of host countries. The author foresees a further fertility decrease of Maghreb immigrants, possibly even below the average of the host countries. A remarkable phenomenon is the lower fertility

of the Maghrebians in France and in French speaking Belgium than in more nordic regions (Flanders, Netherlands, Norway). The author hypothesises that this difference may partly be due to the difference in integration policies, the French one being more assimilationistic oriented whereas the others are more multiculturalistic. Also the possible effects of differences in regional recruitment in the countries of origin might have an effect.

The author considers nuptiality, early marriage and mixed marriages as an even more important criterion of integration. Early marriage disappears fast, but the prevalence of mixed marriages between the immigrant and native population is relatively low, however, could show an increase. For both characteristics, however, French Maghrebians again show a more progressive (integrated) behaviour than the ones in Belgium and the Netherlands.

Whereas the Maghreb immigrants clearly show signs of demographic integration, i.e. have gone a long way through convergence towards the characteristics of the host countries, notwithstanding they often come from more rural and backward regions in their country of origin displaying many characteristics associated with pre-transitional demography, social and economic components of integration show a much less rosy picture.

In modern societies, educational attainment undoubtedly belongs to the most essential predictors of life course success whereas insufficient education can easily lead to social exclusion. A key issue in lagging integration is the low educational attainment of the North-African population in Europe compared both to the standards of the host country as well as the country of origin. The latter points to the fact that most immigrants were selected at the bottom of the social ladder. However, a North-African intelligentsia appears to be emerging inside this diaspora. Moreover, socio-economic features appear to explain better scholastic achievement than ethnic origin.

The labour market position of Maghreb immigrants is relatively bad and even worsening, displaying the worst situation among the second generation. In some countries, the unemployment rate is reaching the level of 50 per cent in the latter group. The author considers it a paradox that the North African workers who were attracted to Europe to alleviate shortages of manpower, are now crippled by high unemployment rates which jeopardises all the efforts towards integration. He is of the view that Europe should first resolve these huge pockets of immigrant unemployment and use its domestic manpower reserves before considering to replenish its dwindling labour force by replacement migration.

The concluding section of Courbage's paper is devoted to needs for future research on the foreign origin population in Europe:

- there is a need for a pan-European standardised survey covering issues of integration/exclusion of foreign origin populations;
- the continuing high fertility rates of some immigrant populations need greater clarification;
- the unacceptably high unemployment rates, especially among the youngsters need to be studied more thoroughly;
- internationally comparative studies on integration need to be done in countries with different policies (e.g. assimilationistic vs multiculturalistic) towards immigrant populations;
- the selectivity processes which could be one of major factors behind the differences between immigrant groups in the country and probably have long-term effects through the second generation as well should be more extensively addressed;
- special attention should be given to the spatial distribution of immigrants and the effects of concentration and deconcentration patterns on integration/assimilation and ethnic minority formation.

In his discussion of Youssef Courbage's paper Kalev Katus (Estonian Interuniversity Population Research Centre, Tallinn) first acknowledged the novelty of the analysis of Maghreb origin populations and their integration patterns and considered the suggested future

research needs and challenges for the demographic analysis of foreign origin populations and their integration in host countries an important input to the Workshop.

Concerning the methodological questions, the discussant first stressed the need to define, indeed, immigrant populations not only by citizenship, but to take into account also the origin criterion. Second, in his view integration is to be considered as a process that takes place at the population rather than at the individual level. It implies a convergence between foreign origin and native populations in major demographic and social processes as well as in an increasing similarity of population structures.

Next, the discussant turned to the results of the analysis on the integration/disintegration of Maghreb immigrants in EU countries by a number of demographic processes and structures. Here, the discussant questions the thesis whether the decrease of fertility in immigrant populations can be considered as a sign of integration or merely as a manifestation of the progressing demographic transition in those populations. In this context he advocates that studies on immigrants need to compare the population of the host country, the population of the country of origin and the immigrant population itself.

The discussant also underlines the necessity to extend research interest to the second generation of immigrants. The second generation of foreign origin population will be increasing in importance in the near future and appears to be confronted with lasting socio-economic problems and persisting discriminatory attitudes from the side of the native population.

Among the suggestions for future research elaborated in the introductory paper, the development of a harmonised and comparable database through a new pan-European survey of foreign origin populations fully corresponds to the aims of the NIEPS partners. The major immigrant groups in Europe – Mediterraneans, Eastern Europeans and overseas migrants - should be included in such a venture.

Future immigration to the EU in the context of the eastern enlargement and Mediterranean co-operation

The introductory paper by Jonas Widgren (International Centre for Migration Policy Development, ICMPD, Vienna) presented his views on current and future immigration to an enlarged EU, as well as on expected and desirable policy responses to these developments.

The author departs from the thesis that 15 to 20 years ahead the annual gross immigration to the enlarged EU from third world countries will be at the level of three to five million, even without any significant political decisions on desirable entry levels. This phenomenon will further influence the integration patterns of immigrants. Any pertinent inventory of future research needs should depart from this expected increase that makes most of the current concerns obsolete in the near future.

Widgren reminds us that the regulatory framework for immigration to the 15-EU should, according to the Amsterdam Treaty, be in place in 2004: joint admission rules, joint annual entry monitoring and joint refugees policies. In 2006, 25-EU will administer a still shaky but gradually improving collective immigration control machinery, based on Schengen standards. This implies free circulation and establishment of rights of all the citizens of the new 25-EU and a joint external border control system. By 2010-2015 the SAP countries and Turkey will be increasingly associated to this system. Trans-Mediterranean co-operation (the Barcelona Process) will ensure that North-Africa and the Eastern Mediterranean will roughly apply the same migration standards, without being part of the free circulation regime. All this will obviously have an impact on flows, and hence on immigration integration.

One of the central issues in Widgren's presentation is Europe's need for immigrants, i.e. replacement migration. According to the author, in order to ensure economic dynamism, sustainability of pension systems, productivity and creativity of ageing societies, the only option is to open doors for immigrants. He notes that the enlargement of the EU will not help in this regard, as the demographic prospects in Eastern Europe are as dark as they are in the Western part. According to the author, without replacement migration Europe will slowly, but surely succumb into an archaic, non-productive, elderly landscape.

The author argues, as one of his two major conclusions, that in the future immigration flows will make the role of ethnic networks become primordial in influencing immigrant integration patterns. The ethnic factor will become dominant and outweigh traditional push and pull factors.

The second conclusion of Widgren concerns integration policies. He foresees an inevitable shift from an EU cultural integration approach towards an US-like melting pot. In accordance with his expectations, he calls for shifting the integration research from the paradigm of newcomers entering and adapting to monolithic/monocultural entities (like Finland or Ireland) to the paradigm of pluralistic/multiethnic entities (like Bosnia and Herzegovina and Lebanon). In this view, social cleavages between groups, labour market advancement and anti-discrimination will be of paramount importance and replace the need of cultural adaptation to the majority scene.

In his discussion of Widgren's presentation, Lars Østby (Statistics Norway, Oslo) critically evaluated all of the speaker's major statements and conclusions.

The first one of them concerns the advanced figures on future migration flows. The discussant considers Widgren's predictions as a problematic bias of the paper as he has clearly the tendency to present numbers in a "crisis maximisation" setting. This concerns more particularly the expected number of immigrant to an enlarged EU, and evidently also the future "demographic demand" for net immigration of Europe. The discussant argues that the figures which are not very well justified, will exaggerate the problems which politicians and media see with immigration.

The second issue which attracted the strongest criticisms from the discussant is the concept of replacement migration. The discussant reminded that population ageing is an inevitable demographic process in modern society that cannot be significantly reduced (or even stopped) by migration, as immigrants are ageing like the rest of the population. Instead, modern society should adapt to population ageing and a new balance of population structures should be sought. The discussant advanced some possible adaptive measures such as enhancement of retirement age, decrease of unemployment, increase of productivity, raise of fertility, modification of tax levels, reduction of the compensation levels of pensions.

The third major issue on which the discussant concentrated is the supposed shift from cultural integration of immigrants towards the multiethnic melting pot. The discussant pointed out that integration, and research on integration, should be based on the reality of modern European societies and not on value judgements about how these societies should have developed. Currently, migrants still enter European countries with a dominant ethnic majority and a pretty monolithic structure (multi-ethnicity is clearly an overstatement for most European countries), and the concept of cultural integration remains very relevant.

The discussant concludes with noting that Widgren's presentation gives two insightful reminders (1) to be aware of the links between the size of immigrant flows and integration and (2) to strengthen the communication between statistics and research on one hand and policy making on the other. Currently, a sound empirical basis for migration policy planning is lacking in the EU, or wider in the ECE region, in spite of the generally agreed needs for

this. The improvement in data quality achieved by OECD and EUROSTAT, as well as by other actors in the field during the last two decades is not impressive.

Integration policies in the transition countries: Estonia and its integration policy in the context of the ongoing EU-accession

The paper by Raivo Vetik (Institute of International and Social Studies at Tallinn Pedagogical University) presented the case study of integration policies in Estonia in the context of the ongoing EU accession. The paper proceeds from the perspective of political science and focuses on demographic trends related to national integration processes, political context of integration, integration policy of the Estonian state and further perspectives in the integration policy.

In his overview of recent demographic trends Vetik reminds us that Estonia, like other nations of early demographic transition, turned from emigration to immigration country after WWII. In the case of Estonia, however, this turn was dramatically strengthened by geopolitical change. The incorporation of the country into the Soviet Union opened the country to mass immigration, primarily from the Russian Federation which in the immediate post-war decades was experiencing very rapid population growth. Population losses in the course of the war, repression, deportation and the installation of the Stalinist regime served as an additional driving force of immigration. As a result, an extremely large segment of foreign origin population emerged in the country, accounting for two fifths of the total.

After Estonia became again independent in 1991, the Soviet-time immigrants to Estonia did not receive automatic citizenship and were expected to pass through the process of naturalisation. This process is yet far from completed. During the 1990s, the population of Estonia decreased by 13 percent, partly due to negative natural increase, but mainly due to out-migration of non-Estonians.

As far as regards inter-ethnic relations in the last decade, the most important change by now is that integration efforts are gradually replacing the strong ethnic confrontation of the first half of the 1990s. The policies developed in the country need to combine two rather contradictory tasks. On one hand, there is the task of nation-building which was disrupted by the Soviet regime and implies homogenisation and consolidation of society; on the hand, the integration implies an opportunity for the foreign origin population, coming from diverse social and cultural backgrounds, to maintain and develop their identity.

The current policies of the Estonian state in integrating its society aim at realising an optimal balance between unity and difference both in public and private spheres and forms the basis of the new Estonian model of multiculturalism. This policy consists of two essential components: on the one hand social homogenisation of the society, based on the knowledge of the Estonian language and the acquisition of Estonian citizenship, on the other the opportunity of preserving ethnic differences through the recognition of minority cultural rights.

As far as concerns the future of Estonia's integration policy, the author explains that the integration programme for 2002-2007 includes three domains: cultural-linguistic, political, and socio-economic. However, so far the implementation of the programme has been focussing heavily on the cultural-linguistic aspects of integration and will in the future need to give greater consideration to political and socio-economic issues.

Proposals for future comparative research

The Workshop discussions on possible future comparative research in Europe in the field of demographic and cultural specificity and integration of migrants was introduced by the report of the NIEPS Technical Meeting drafted by Christiane Hintermann (Viennese Fund for Integration; formerly Institute for Demography,

Austrian Academy of Sciences, Vienna). The NIEPS Technical meeting was held in Vienna on 15-17 February 2001.

The results of the NIEPS Technical Meeting

The aim of the Technical Meeting on demographic and cultural specificity and integration of migrants was to undertake an in-depth examination and evaluation of survey instruments used in the partner institutes in order to prepare, on the basis of the results of the first workshop, a draft outline of an innovative framework for research instruments to be used in future comparative research.

The Technical Meeting addressed the following issues: migration patterns in Europe, reasons for migration, the needs for migrants, integration issues, and problems of available data. It examined various thematic options for future comparative research: migration research in general, comparative study of integration of migrants, East-West migration, international and internal migration, internal EU migration, illegal immigration, ethnic minorities, and asylum seekers and refugees.

The Technical Meeting suggested limiting the proposed study to an internationally coordinated and comparative research project on the patterns and determinants of integration of migrants. The core of this study would consist of an internationally comparable and representative sample survey. Eastern as well as Western Europe should be included in the project. The survey is necessary because available statistical data do not suffice to undertake such a study and only a few countries have so far gathered micro-level data of limited and not always comparable nature in this field.

In addition to the representative sample survey, a Delphi survey was suggested to be addressed to politicians and high-level civil servants on immigration and integration issues. Further, a content analysis of the legal and policy framework and the socio-political situation in the participating countries was considered to be indispensable as a background study to the survey.

It was suggested that the survey would include the following information: parental background, biography of respondents, biography of children of respondents, migration history, socio-economic characteristics and living conditions, bilateral (migrants vs. domestics) perceptions and expectations, interaction between migrants and domestics, bio-medical and psycho-social features, measurement of the degree of integration. Although the purpose is to develop a multidisciplinary project and to study integration in all of its four major dimensions – structural, cultural, social and identificational - the NIEPS proposal should pay special attention to the demographic aspects of integration. The repertoire of analytical tools is to include event-history methods and distance measurement.

The survey is to be done by means of a standardised core questionnaire to which countries could add modules based on their specific interests. Because of numerous problems linked with panel studies, the Technical Meeting suggested not to undertake a panel, but repetitive cross-sectional surveys with the aim of repeating the survey in 5-10 years' time, if the means are available.

As regards to the samples to be targeted, the Technical Meeting recommended to include obligatorily at least two migrant groups of specific origin together with a native control group in the survey. Important is that the migrant samples should include second-generation migrants. Optionally the survey could be extended to naturalised migrants, a 'non-problem' group and a national minority group. The sample of some 1400 respondents per group is to consist of individuals aged 18-50 and belonging to both sexes.

The Technical Meeting recommended that at the end of the NIEPS project, a team should be constituted to work out a project proposal in view of developing a project to be submitted to the EC Sixth Framework Programme.

Framework for a future comparative survey on integration of migrants in Europe

The discussion in the Workshop covered all principal aspects of the planned study and clarified the key elements of its design. The participants gave their general support to the outline of the study developed at the Technical Meeting. In particular, the value of the possibility to compare the experiences of the same immigrant groups by origin across different national settings was underlined. Most importantly, such an approach would allow to clarify the role of various political and social contexts in the course of integration processes.

As far as concerns the survey goals, the choice of the central focus – integration of migrants – was unanimously supported, but it was made clear that this choice does not imply any preconception or prejudice about the type of integration. The aim is to record, analyse, and evaluate the different forms of behaviour of migrants and natives and their interaction, including also the interaction between different migrant populations themselves.

A major question raised during the discussions concerned the choice of the target groups to be studied. As NIEPS follows a comparative European perspective, it includes countries with diverse emigration/immigration experiences. Given the different timing patterns of demographic development, the different geographical settings and the different historical developments, the countries differ considerably in terms of the size and the origin of their immigrant populations. Those differences exist not only between Western and Eastern Europe, but can also to a considerable extent be found within the two groups of countries, including the EU member states. The three main types of immigrants in Europe – Southern and Eastern Mediterranean (Maghreb and Turkey), Eastern Europe and overseas – should be included in the project and, wherever relevant, particular attention should be paid to second-generation migrants.

The differences in migration “histories” of countries require careful consideration and sufficient room left for flexibility in the study. To this end several participants addressed the possibility of including national minority populations among the target groups of the survey. In some countries, for example, the integration of Roma minority populations is highly policy-relevant. Although not questioning the importance of national minority research, the majority of the NIEPS partners inclined towards the recommendation of the Technical Meeting not to pursue research in this particular direction, taking into consideration research projects recently accomplished or currently under way and referring to the experience from recent studies of the European Population Committee of the Council of Europe, showing the considerable difference in the ethnic and political problems faced by immigrant populations on one hand and national minorities on another hand. A clearly defined rather than a mixed focus of the project should be favoured. National minorities deserve a separate comparative research project.

Primarily due to financial and logistic considerations, the extension of a new survey towards sending countries was not encouraged, although earlier studies of this kind, undertaken by some NIEPS partners have yielded interesting results.

Regarding the age range of the target survey samples, it was suggested that the lower limit should be decreased to include the experiences of school-age children, or at least of adolescents, - a major problem group among second-generation migrants. Although some information could be collected from parents, interviewing youngsters themselves was seriously taken into consideration.

With respect to the contents of the survey the need was stressed to have a completely comparable core questionnaire. Reference was made to relevant experience from the European Fertility and Family Survey (FFS) where even fairly small departures from the standardised core questionnaire have hampered the comparability. It was also emphasised to pay attention, in addition to objective characteristics, to issues of subjective self-identification, especially in the case of individuals and couples of mixed origin. The strategy, already applied by the Technical meeting, to amply make use of existing survey experience in Europe, should be continued.

With respect to the suggested analytical tools, support was given to the application of life course perspective and event history methodology, among others in addressing the selectivity of migration processes. At the same time, however, the need was underlined for the elaboration of specific methods to appropriately account for the fact that life histories of immigrants may be split between sending and receiving countries. Moreover, in some cases life histories can include repeated forth and back movements between sending and receiving countries. Addressing these issues will likely enhance the survey value in terms of elaboration of event history methodology.

Ageing, intergenerational solidarity and age-specific vulnerabilities

The 1st Workshop on ageing, intergenerational solidarity and age-specific vulnerabilities

This Workshop was organised by the Istituto di Ricerche sulla Popolazione (IRP) and was held in Rome on 20-21 April 2001.

The Workshop had as main objectives to concentrate on the life histories and life experiences of the aged. It was to give state-of-the-art overview of the major directions of studies on ageing, intergenerational solidarity, age specific vulnerabilities and policy issues with particular attention to the concepts, approaches and methods used, both in national studies and in European comparative perspective and to focus on possible future trends of ageing and prospects for alternative strategies to improve relevant policies, among others, by identifying the best practices in the field. Finally, the Workshop was expected to formulate guidelines for the forthcoming Technical Meeting on the development of further research instrumentarium in the field.

The discussions at the Workshop were first introduced by solicited papers and by presentations on the theme-specific experiences and activities of the partner institutions. The solicited papers dealt with:

- Ageing and vulnerable elderly people in Europe (presentation by Emily Grundy, Centre for Population Studies, London School of Hygiene and Tropical Medicine and discussion by Jozef Pacolet, Higher Institute of Labour Studies, Catholic University of Leuven);
- Ageing and international solidarity (presentation by Gustavo de Santis, University of Messina and discussion by Jenny Gierveld, Netherlands Institute for Advanced Studies in Humanities (NIAS), The Hague);
- Challenges for social protection in ageing societies (presentation by Dragana Avramov, Population and Social Policy Consultants (PSPC), Brussels).

Next, the NIEPS partners presented their recent research on ageing, intergenerational solidarity, and age specific vulnerabilities.

The executive report on the Workshop was prepared by Etelka Daróczy (Demographic Research Institute (DRI), Budapest). The proceedings of the Workshop were published by the Bundesinstitut für Bevölkerungsforschung (Gesano and Höhn, 2002).

Ageing and vulnerable elderly people in Europe

Emily Grundy's paper examines the meaning of age-related vulnerability, deals with sources of age-specific vulnerabilities and defines which groups of the aged may be considered most vulnerable. All these issues are discussed with reference to past, present, and possible future policies designed to improve the well being of older people.

Considering the policy response to the historical shift to older age structures in Europe, Grundy starts by reminding us that, whereas early policies were based on the implicit assumption that being old was itself a source of vulnerability, more recent policies take more into account the diversity of the elderly population and the ageing process and emphasize the need to target services and resources on segments identified as particularly vulnerable.

Grundy defines vulnerable elderly people as "... those whose reserve capacity falls below the threshold needed to cope successfully with the challenges they face. Such an imbalance may arise either from severe depletion/lack of reserve resources or particularly serious challenges." Senescence is therefore neither a necessary nor a sufficient source of vulnerability to a very poor quality of life or an untimely or degrading death. Moreover, various policy measures like compensatory supports or interventions may be activated to mitigate the effect of challenges or partially restore levels of reserve.

Challenges that may be faced in later life are grouped into two categories: relatively sudden changes like divorce, bereavement, attack or accident, entering an institution, discharge from hospital, etc. and relatively 'smooth' deterioration in health, access to health care, level of income, quality of housing, social roles, etc.

Old age 'reserves' are defined as a lifetime's accumulation and depletion of resources and skills that people bring to later life. The level of these reserves in later life may in some cases be very largely determined by life course factors. The bulk of Grundy's paper discusses the most intricate dimensions of reserve: income and material resources; family and social support; living arrangements; health and autonomy.

As for material resources, the author raises the issue of the exclusion of older people from the labour market through mandatory retirement policies and more in particular through early retirement which, moreover, has not been restricted to those made redundant or in bad health, but also to those with more assets. From the point of view of the elderly, lack of choice about when to leave the labour market and dependency on money transfers and returns on investments represent specific vulnerabilities. Retired people's income depends on decisions made by others over which they have no direct control. The paper highlights that recently retired generations have far more material resources than previous generations but that the inequality within the elderly population is increasing. The risk of poverty is high among the very old, especially very old unmarried women, those with lifetime low incomes and members of some minority ethnic groups.

Grundy stresses the importance of family ties and social resources in later life. Gender, marital status and the number of children have an important impact: far more men than women have a spouse in old ages; marital status is closely associated with economic security, psychological well being and receipt of care; though a higher proportion of children survive to their parents' old age, declines in fertility may counteract. The increasing risk of being never-married or divorced in old age and the incidental fewer and looser ties with children and other relatives are likely to become important issues in the future, in particular for men. There are large differences between European nations and population subgroups in the availability and the extent of family contacts. Frequent family contacts and co-residence is more usual in

Southern than in Northern Europe, but there is much less cross-country variation in the percentage of elderly people reporting loneliness.

The frequency of living with relatives is likely to decrease in the future but co-residence is not a panacea against isolation anyway. Wider social networks (relatives, neighbours and friends typically for women and former workmates for men) are gaining in importance in old age. The author argues that relatives seem most efficient at providing emergency help to older people but the overall range of resources available (of emotional, practical help, advice and companionship) is higher in networks that include both relatives and friends. But the size of the network is more likely to decrease than increase with age. The very old people, especially those with disabilities that prevent them leaving their house freely, a group who may lack friends or close ties and those separated from close relatives by migration are particularly vulnerable to isolation or lack of support. Those who need help and live alone are more likely to receive this help from formal services than are those with a co-resident. There is some evidence that living alone may be associated with various health-related disadvantages and functional decline and higher risk of anxiety and depression. But there is also a selection effect: those with serious health problems are no longer able to live separately.

There is a considerable uncertainty about the implications of trends in mortality and morbidity. It remains, however, clear that poor health shows a strong association with age, and the prevalence of health problems and disabilities is higher among women than men. Apart from age and gender, there are substantial variations in the health of elderly adults by social and socio-economic characteristics. The most vulnerable groups with regard to health appear to be the very old, those with the lowest incomes, a history of work in less skilled occupations and low social support. Vulnerable old people are often so in several dimensions.

All these risks may challenge the independence (defined as the capacity to do things unaided) and the autonomy (capacity to make, and have implemented, decisions about their lives) of old people. Groups most at risk include those with learning disabilities, those with acquired cognitive impairment and residents in institutional care. A minority may also experience abuse or neglect.

Recalling that sources of vulnerability (very old age, low incomes, poor social ties, bad health and limited autonomy) often intersect, the author concludes that policy initiatives should focus on the various parts of the dynamic process that may result in vulnerability: promoting healthy lifestyles, acquiring coping skills, developing strong family and social ties, activating interests and accumulate savings and assets throughout the life course. Interventions should help people to cope with challenges and reinforce their reserve.

Whereas Grundy's contribution is demand-oriented, Pacolet's discussion paper aims at a complementary supply-side approach on social protection and ageing in Europe. More specifically, he aims to quantify the magnitude and direction between ageing and vulnerability for the sake of prediction, planning, and projection, as well as for the organisation of the supply of care for dependent elderly.

Pacolet summarises the available information on dependent elderly and the health- and long-term expenditures in EU countries. He argues that under the hypothesis of a declining morbidity and dependency, it is possible to maintain present levels of social protection, or even improve them within reasonable boundaries of expenditures.

Various needs of dependent elderly can be met by formal and informal protection. Normally, the social security system covers the income and health care risks and different levels are responsible for other forms of care. Sometimes the costs have to be borne individually or by private insurance. Finally, a lot of care is still provided by the family.

It is estimated that old-age risk is now linked with $\pm 15\%$ of the population, $\pm 20\%$ of whom will be dependent on PADL (Personal Activities of Daily Living) and IADL (Instrumental

Activities of Daily Living) after the age of 65. Approximately 5% of the 65+ are expected to be severely dependent on PADL.

The pressure from growth in life expectancy and the number of dependent older persons places a higher burden on the existing care systems than they were originally designed for. This has been the case in many countries, stimulating the debate on long-term care insurance. But the major impact of the greying of the population is to be found in the existing systems of social protection and concerns primarily pensions and health care expenditure. The share of pension expenditure in relation to GDP varies from 5 to 15% from country to country. The level of expenditure on health care is the second major category of social expenditure: it varies from 4 to 8% of GDP. 30 to 50% of health expenditure is directed towards the population of above 65 years of age. Health expenditures do not cover all dependency costs. Part of it is included in social services. The estimates about it vary between about 0.20% and 2% of GDP. Although the cost containment ideology is present in most of the health insurance schemes, expenditure on health care continued to increase in most countries, although with some convergence trend.

The author argues that in contradiction with many 'time bomb' scenarios, the macro-economic cost (not the cost for the individual) of long-term insurance is bearable – now between 0.25 and 2 to 3% – and under certain conditions it can be maintained at that level. Catastrophic scenarios are of a static nature and are, in the author's view, useless because they do not consider the evolution in medical science. He is rather in favour of dynamic projections that estimate the growth rate of the number of dependent elderly about 40% lower than static projections. The potential of prevention and of desinstitutionalisation are further reasons to believe that the cost explosion will be within reasonable boundaries. Compression of morbidity, with a lower degree of prevalence of severe or moderate dependency, could imply a lower growth rate of disabled older persons than simple demographic projections would let us conclude.

Nevertheless, there is a clear problem of underinsurance and underfinancing (be it public or private) of the cost of long-term care. Too large proportions of these costs have to be covered by the current income or by social assistance. An alternative form of financing these services via a long-term care insurance system has been developed in some countries whereas in others it is on the political agenda.

As far as concerns services of long-term care the author reviews the variety, availability and affordability of institutional, residential and community care and care services in various countries of the European Union. A picture emerges of a growing and maturing mix of differently organised but mostly publicly financed care provision within a mainstream public discourse of budgetary austerity. The period of quantitative expansion was followed by a period of innovation and qualitative differentiation and a shift from formal towards informal care. This paradigm shift in favour of informal care, however, puts the increasing number and proportions of lonely and most vulnerable elderly further at risk.

In conclusion, the author argues that while the situation concerning the benefits and services for older people in the welfare states is generally positive, there are problems of under-protection, deteriorating quality, uncovered needs, or social protection falling behind the rest of the economy. Long-term care insurance can help prevent this.

Ageing and intergenerational solidarity

De Santis' report discusses the notion of ageing, and suggests a method for keeping the share of the major age classes in the population unchanged. The paper also deals with the concept of solidarity, showing that it can operate in different ways over time and across countries. Contrasting the growing need for formal care for the elderly and state budget constraints the authors indicates that there is still margin for adapting social welfare institutions to the new demographic era.

De Santis proposes to adapt our way of conceptualising the ageing problem to evolving conditions and to use other indicators to measure and perceive population ageing than the simple share of the population beyond a given threshold age. He suggests that the threshold ages for separating the young from the adults, and the adults from the elderly should not be kept fixed but should be adapted to changes in the cross-sectional life table. The method of adaptation he proposes is to keep the relative proportions of life spent in young, adult, and old age groups unchanged. To do this he introduces the notion of "reference" age structure which is an equilibrium point, around which the actual age structure of the population oscillates, assuming that the long term rate of demographic growth is (practically) zero. The reference age structure may be equalled to the age structure of the stationary population associated with the current life table.

Keeping the shares of the different age groups constant allows also to distinguish easily the ageing effect caused by longer life expectancy from the ageing effect caused by low fertility. The author calls "structural" the ageing due to a longer duration of life, assuming that societies always strive to keep it as high as possible, i.e. mortality cannot be considered instrumental. On the contrary, he defines "contingent" the ageing due to lower-than-replacement fertility because fertility will *have* to reach reproduction level if the population is not bound to disappear.

In his illustrative simulation of the evolution of the age structure of a population where life expectancy increases from 73 to 87 in 200 years and then stabilises and fertility fluctuates between 1.3 and 2.5 the share of the elderly with the conventionally defined threshold for old age at 60 years would be 31.4 percent after 300 years, whereas it would only become 21.7 percent if the beginning of old age increases up to 68.7 years. De Santis concludes that whereas contingent ageing may become a problem and that its causes be faced and removed so that fertility be brought back or relatively close to reproduction level, structural ageing is not a problem, but a predicament if we move the conventional threshold ages so as to preserve the share of the elderly in the reference population.

Next De Santis turns to the topic solidarity. He distinguishes four major risk categories that may require protection: sickness/health care/disability, old age, children, and specific forms of social exclusion (poverty, unemployment) and three main options for risk protection: family, state, and individual action (e.g. private insurance). Solidarity is an important ingredient of family and state interventions because in both cases there is a non-coincidence between the time of giving or receiving benefits, whereas individualism prevails in the third case. All three mechanisms operate all over the world at the same time, but their relative importance differs in different regions. In Europe e.g. the north, with the exception of Ireland, and the south show distinctive features in various socio-demographic indicators such as living arrangements, marital status, illegitimacy, and patterns of residence and work, the south being decidedly more family oriented.

As far as concerns living arrangements of elderly, co-residence with children is much more widespread in the southern than in the northern part of Europe. In more family oriented societies adult children show also higher frequencies of proximate settlement to their elderly parents and the latter are less often institutionalised. Women are much more frequently alone than men.

But all of these differences are rapidly shrinking. There are widespread tendencies of late home leaving, later and less frequent marriage, increase in divorce and in cohabitation, lower fertility, thinner households, smaller networks of kin. Traditional caregivers – women – are getting more and more involved in the labour market and are less available for their former roles. The combination of more elderly persons living longer and living alone, might, more particularly in case of frailty, produce an explosive mix.

De Santis sees the decrease in family-provided assistance - the traditionally most important form of solidarity - as the major change in the future. Under the impulse of individualism, post-materialism and other underlying causes of the recent demographic regime changes all forms of long-term personal commitments – e.g. marriage, children, co-residence - are becoming less popular. In the author's opinion the solution to the problems of ageing will have to derive from a combination of three possibilities: reducing needs, exploiting the increased free time of mature adults/young elderly, and augmenting (or improving the efficiency of) public intervention.

As far as concerns possible improvements in public intervention De Santis suggests among others the following: minimising the harmful consequences of public action (e.g. excessive tax load, early retirement, diverting disability pensions) and adaptation of the retirement age to evolving survival conditions. In this respect the author also dwells on the issue of intergenerational accounts. He comes to the conclusion that although women are the advantaged gender in government actions in the social field, they are disproportionately poorer than men and suggests several preventive solutions so as to reduce the likelihood of the problem to emerge.

In his conclusion De Santis considers the withering of traditional forms of solidarity not necessarily as a disaster, but he esteems the rapidity of the changes together with the rigidity of most of the institutions involved a cause for concern.

In her discussion of De Santis' paper Gierveld first emphasises that the suggested new definition of ageing, based on fixed proportions of the elderly, goes together with flexible age boundaries. She esteems that the transition from the present fixed age borderlines towards fixed proportions of elderly has both positive and negative effects. It has the psychological advantage that it eliminates the traditional thinking of ageing as a problem and the fear of being 'crushed' under the weight of the rapidly increasing aged population, but it denies the social fact that the boundary for older age is nowadays largely related to the age of official retirement from the labour market, and/ or the age of entitlement to state pension schemes. Adopting De Santis' approach would imply a sharply increased age boundary for the official designation of old age. Society, older workers and companies would have to be prepared for the entitlement for state pension schemes to come at a much later age. Moreover, one must take into account that the *de facto* ages at retirement are nowadays far below the official ages. This means that in many European countries workers and companies would have to accept and adapt to an additional 10 years of labour market participation. Even if a transitional period would be foreseen, social conflicts can be expected, as well as the use of other pathways out of labour market participation, e.g. via sickness or disability schemes.

Gierveld suggests a period of intensive discussion on the pros and cons of introducing De Santis' approach and his concepts of structural and contingent ageing and reference age structure. Moreover, in several countries in Europe the current pace of the ageing process is not only related to structural and contingent ageing but also to the influx of international migrants and this should not be neglected, particularly in the short run.

Finally, Gierveld raises the question what might be the consequences of a flexible boundary of age categories for the old age dependency ratio? She is in favour of a new dependency ratio that takes into account the increase in healthy ageing, the increased educational levels of cohorts that will enter older ages in the near future and their capacities to better adapt to the consequences of older age, and to preventive health behaviours. What is urgently needed is a new dependency ratio based on more realistic ages for the start of dependency, and the start of a period of being in need of informal and formal support.

Next, Gierveld turns to the question of solidarity. She stresses that in the industrialised world it is more acceptable to receive support from the state, based completely on civic rights, than on direct support from the children. Nowadays, older adults prefer to be independent as long

as possible and to have their adult children settled in the neighbourhood rather than to co-reside. Both older and younger generations appear to favour “intimacy but at a distance”.

Challenges for social protection in ageing societies

The contribution of Dragana Avramov provided a wide panorama of ageing processes and policies, and of the socio-economic situation of the elderly in Western Europe. She focused on the achievements and shortcomings of the present system of social protection as it affects senior citizens in general and those socially fragile in particular, using micro level data from the third wave of the European Community Household Panel.

The author found the social vulnerability of a considerable proportion of elderly to be associated with the interdependence between several general socio-demographic tendencies: generational changes in educational attainment characterised by lower educational level of elderly in comparison to younger generations; generational changes in the level of insurance based benefits that could be secured over the life course of the present day elderly; life-course changes in the propensity to generate work-related income; deterioration of health during ageing particularly among the low income and poor; prevalence of women among older people and elderly women usually having a much lower if any insurance based earned pensions; prevalence of single people among the oldest old aged 80 and over.

In terms of the standard of living and quality of life of the elderly people Avramov finds that under the prevailing system of social protection, which includes a variety of needs-based transfers to complement insurance based benefits and personal assets, welfare regimes play an important role in decreasing risks of poverty and poverty related social vulnerability. Welfare regimes in the European Union countries appear to be effective in reducing risks associated with old age and ill health, albeit, cross-country differences continue to persist. In countries in which welfare regimes are weak providers and governments rely heavily on family to ensure support to its socially weak members and in countries that strive to shift responsibilities towards the market, the elderly appear to be worse off. Market based insurance schemes proved so far to be insufficient for maintaining a decent standard of living of all – social transfer payments are needed to pull out of poverty considerable proportion of people of all ages.

Regarding the distribution of prosperity and poverty across ages in terms of housing and consumer durables the author recorded age based disparities but also generational changes in the perception of needs and expectations. The self-perception of elderly appears to indicate that they are more satisfied with their activity status, income, housing conditions and leisure than the active-age population. In terms of sociability they do not appear to have less casual contacts with neighbours and friends than the active age population. Elderly are however over represented among singles and are as a rule inactive and thus are more prone to be isolated from others in their daily life.

Lack of material means as one of the features of social vulnerability – measured in terms of income poverty – shows that elderly are over represented among low income and poor groups. In terms of poor non-material means – measured by education – elderly are over represented among low education groups. In terms of poor health substantial proportions of elderly are more hampered in their daily activity by illness or disease. In terms of potential competitiveness of elderly in the regular labour market lower educational level and age-related health difficulties make them more fragile runners.

Avramov’s analysis shows that it is the overlapping of income precariousness, bad health and poor housing both in terms of quality and adaptability to age-specific needs that increases risks of social exclusion from the access to levels of prosperity accessible to other age groups. The worst off, in terms of income and housing conditions, and the least satisfied with their situation in society are elderly living in countries with less-well developed welfare regimes, more particularly in the Southern European countries.

Regarding the policy discourse on active ageing the author notes that the overwhelming majority of today's elderly are satisfied with their economic inactivity and concludes that changes in public policies and public opinion may be needed to promote the policy aim of working longer and retiring later and more gradually. Activating the elderly may require public funding for enhancing their skills in view of the generational changes in educational attainment and labour market requirements. Participation in the regular labour market of the present day elderly must also take into consideration the health distribution in this age group that may require forms of sheltered employment. Both the macro economic cost/benefit of elderly employment and the individual needs and preferences of the elderly will have to be taken into consideration by policy actors.

Up to date the trend towards early retirement well below the statutory limit has coincided with such factors as the disenchantment of older people with work, the self-interest of employers in removing from the labour market the elderly who are less skilled or more expensive than younger workers, and the needs of families to use the pool of early retired relatives to provide informal care both to (grand) children and elderly parents. Much adaptation and reform appears to be needed in the way labour markets operate as well as in social protection policies that aim at enhancing independence and personal autonomy of people in all stages of life.

The research on ageing, intergenerational solidarity and age-specific vulnerabilities in the national population institutes in Europe

In their overview of the recent and ongoing research on ageing and elderly in the national population institutes in Europe, most NIEPS partners also presented a synopsis of the research in their country in general. From this overview it appears that many countries are characterized by the presence of a multitude of research projects on various aspects of ageing and the elderly. In most cases, however, the research is not co-ordinated, neither at the national nor at the international level. Only a few countries have, in addition to the traditional research of individual university or other research institutes, governmentally co-ordinated and integrated national research programme which then include also large-scale sample surveys or longitudinal investigations or which result in comprehensive research or policy reports. A typical example is the Netherlands with its six-year programme of research on determinants of successful ageing, funded jointly by the Netherlands National Research Council, the Ministry of Health, Welfare and Sports and the Ministry of Education, Culture and Science. The Belgian Federal Office for Scientific, Technical and Cultural Matters had in its Programme on Societal Research a project on ageing. In some countries the government produced or commissioned comprehensive reports on population ageing or the living conditions of older people. In Germany there are the successive comprehensive national reports on ageing and the elderly of the Federal Ministry of Family Affairs and Senior Citizens (1993; 1998; 2001) and the interim reports of the Study Commission on Demographic Change of the German Federal Parliament (1994; 1998). In the Netherlands we know the biannual reports on the status of the elderly produced by the Social and Cultural Planning Bureau (e.g. de Klerk, 2001). Another example is the "Seniorenbericht 2000" published by the Bundesministerium für soziale Sicherheit und Generationen (2000) in Austria.

Only a small fraction of the research undertaken on ageing and the elderly is undertaken in the national population institutes in Europe, but in many cases their studies form an essential contribution to the ageing knowledge base, mainly in the domain of the socio-demography of ageing and the aged, and through the organisation of representative sample surveys on the aged population.

Indeed, virtually all national population institutes have been undertaking, are implementing or planning specific research projects on population ageing and/or the living conditions of elderly people. There are, however, quite some differences in the degree of involvement in this domain. For some institutes ageing was so far not a priority, but others incorporated

research projects on ageing and/or the elderly in a systematic way and spent, sometimes over a period of several decades, a relatively substantial part of their resources to those topics. The Flemish Population and Family Study Centre (CBGS) is a good example in this respect: it undertook, at regular intervals, nationally representative sample surveys on living conditions of elderly, in between a large variety of specific studies on particular aged groups or problems (e.g. Dooghe et al., 1988; Vanderleyden, forthcoming). Numerous representative sample surveys or opinion polls on the elderly population, its living conditions and health status have also been undertaken by the Hungarian Central Statistical Office or its Demographic Research Institute. From the literature are also well known the earlier INED surveys on the aged (Paillat, 1964-1981). In some countries, however, important surveys on the aged have been undertaken by other, specialised institutions (e.g. Kohli & Kunemund, 2000)

There are only a few countries that undertook longitudinal surveys, mostly in specialized institutes. Examples are the Longitudinal Ageing Study Amsterdam (LASA) in the Netherlands (<http://sbg.scw.vu.nl/lasa/>), the Berlin Aging Study (Mayer & Baltes, 1996), and the Italian Longitudinal Age Study (ILSA) (<http://www.aging.cnr.it/>).

The extensive reference lists on ageing and elderly studies in the reports of the NIEPS partners show that a broad variety of issues have been or are being studied. The description, analysis and prediction of general demographic trends with respect to population age structure are obviously quite generally present (e.g. KDGD, 1999; Katus, 1995; Roloff, 2000; IRP, 1999; Höhn & Roloff, 1994). Several population institutes pay also more and more attention to the health situation of the elderly, the provision of health care and social services and their costs, the demand for institutional and other forms of formal care, and the question of the compression of morbidity, following the trend in bio-medical, gerontological and epidemiological research (e.g. Doblhammer & Kytir, 1999).

Studies on economic-demographic interrelations are also quite common (e.g. Spéder, 2000; Szulc, 1999). The perception of ageing as an economic and social burden seems to affect research orientations. Policy issues are limited to the social security system (pensions, disability, health care, care insurance, labour market participation, age at retirement) (e.g. Fraczak & Józwiak, 1991; De Rose & Pinnelli, 1992; Pöldma, 1999; Kytir & Münz, 1992).

Virtually all surveys on elderly undertaken deal extensively with living conditions, income and housing (e.g. Dooghe et al., 1988; Knipscheer et al., 1995; Kohli et al., 2000). Also living arrangements, social networks, family and intergenerational relations, and care-taking are usually dealt with (e.g. Knipscheer et al., 1995; Lindgren et al., 1999). Another important group of items are health and validity, well-being and life satisfaction (e.g. Dooghe et al., 1988). Some institutes deal with several of these items in a life course perspective (e.g. Liefbroer & Dykstra, 2000; Fraczak, 1992).

Research on attitudes in the general population towards questions of population ageing, pensions, age at retirement, elderly care, etc. often forms part of opinion poll surveys on population and family matters. The ageing module in the Population Policy Acceptance Surveys I and II is a classical example (Moors & Palomba, 1995; Palomba & Moors, 1998; Höhn, 2002).

Institutes with substantial research programmes on ageing and elderly usually develop also separate research projects on specific elderly groups such as the oldest olds (e.g. Dooghe et al., 1989), elderly women (e.g. Vanderleyden & Dooghe, 1993; Holzner, 1997; Kucerová, 1998), elderly in residential care (e.g. Vanden Boer, 1996).

A few institutes investigated regional differentiations in population ageing or in the living conditions of elderly (e.g. Cantalini & Lori, 1990; Sakkeus, 2000).

Several national population institutes were or are involved in international co-operation projects such as the 1985-1991 project on "Economic and Social Implications of Changing

Age Distribution in Selected ECE Countries”(Cliquet & Vanden Boer, 1989), the 1993-1994 project on the “Dynamics of Population ageing in selected ECE countries” (UN/ECE/PAU, 1998), and the forthcoming project on “Gender and Generations” (United Nations Economic Commission for Europe and United Nations Population Fund (2000) of the UN/ECE/Population Activities Unit in Geneva, Switzerland, the 1988-1991 project on “Social Security, Family and Households in Ageing Societies” of IIASA in Laxenburg, Austria (Gonnot et al., 1995), the 1983-1991 project on “Demographic and Socio-economic Aspects of Population Ageing” of CICRED in Paris, France (Légaré et al., 1993), the CBGS project on elderly women in Europe (Doogle & Appleton, 1995), the “Population Policy Acceptance Surveys” I (Moors and Palomba, 1995; Palomba & Moors, 1998) and II (Höhn, 2002), and the project on “Ageing without children” of NIDI (Dykstra & Hagestad, forthcoming).

The NIEPS partners reported on the following research activities in the domain of ageing, intergenerational solidarity and age-specific vulnerabilities:

Population and Family Study Centre (CBGS), Belgium:

The CBGS research on elderly people and ageing centres around three axes:

1. Network and care relationships between grown-up children and their parents in need of care. The extent and intensity of the support given by elderly parents to their children is studied as well.
2. Elderly people’s housing: independent housing in their own surroundings, housing alternatives, various forms of support and promotion of independent housing (among which service flats are regarded as a form of supported independent housing). Consideration is also given to accommodation like rest-homes and rest-homes with nursing facilities.
3. Heterogeneity of the elderly population: specific categories and/or high-risk groups, such as ageing women, widows, very old people, elderly persons needing care and elderly migrants. They are more often “poor” not only in the socio-economic sense, but also with regard to relationships and social participation.

In 2000 CBGS started a new research project on elderly people’s living conditions. The study is intended to gather relevant basic data on life histories of elderly people, former and present living conditions and expectations of life. Aspects of quality of life are tested against biographical data (gender, age, type of household, education, career history, income). Important modules are: personal autonomy (including health), housing, labour, leisure and recreation, relationships and networks, provisions, well-being. The study is longitudinal. The aim is to re-interview the persons selected after a 5-year period in order to provide an instrument for representing the elderly population’s profile at regular points in time. Results are expected to contribute to formulating answers to relevant social problems like:

- Entry into the care chain and contribution of various care circuits;
- Intergenerational solidarity (at micro- and at macro level);
- High-risk groups within the elderly population;
- Labour versus non-labour.

The survey is built up around three key features that constitute useful instruments for the authorities to achieve their aims, namely, prevention, customised care and participation. The study has three parts:

1. In the first part people between 55 and 90 are questioned on relevant subjects from daily life.
2. The second part aims at an in-depth section. The survey is restricted to one cohort and especially focuses on the intergenerational networks: inter-assistance between elderly people and their children and relatives, different relationships in terms of quantity and quality.
3. Screening of the population of the rest-homes constitutes the final piece of this large-scale survey. It concerns a section of the population on which nowadays only fragmentary research material is available.

Bundesinstitut für Bevölkerungsforschung (BiB), Germany:

In addition to traditional gerontology research, surveys concerned specifically with demographic ageing and the life situation of the elderly are gaining increasing significance in Germany. The following focal points of research can be listed:

1. Elderly policy: long-term care insurance; infrastructure designed to suit the elderly, such as service centres for the elderly; care for old people in need of long-term care in local communities.
2. Work in old age: change in performance potential; opportunities for the elderly on the labour market; Innovation and ageing at work; life-long learning.
3. Life situations and lifestyles in old age: household and family; housing and housing environment; income and assets; health; and leisure and social participation (e.g. honorary activities). The national Old Age Survey (2000) and the Berlin Old Age Survey (1996) on the above aspects of life situation deserve attention.
4. Material security in old age: The question is whether the material security of the elderly of the future can still be guaranteed by the traditional (pay as you go) pension systems. Improving pensions for women, particularly mothers, is also a constant subject for discussion.

Demographic ageing, its economic and social impact, is one of the focal points for research at the Federal Institute for Population Research. The major projects on this topic are the following:

1. Expectations of life in old age. 960 persons were surveyed, aged from 40 to 59 years of age. The main points of this survey were: anticipated standard of living in old age; anticipated age at retirement; and assessment of the life situation of elderly people and potential for an active life in old age.
2. The elderly of the future - a demographic statistical data analysis. The question was whether, and to what extent future elderly will have different lifestyles those of today. A preliminary estimate of the household and marital status, need for assistance and long-term care, and extrapolation of education levels was carried out for the next four decades. Additional research areas included future pension entitlements; the status quo of participation in gainful employment and the work status of middle-aged men and women; ageing process in EU member states; ageing of foreign population living in Germany; and the development of the very old.
3. Demographic ageing and economic growth: the project aimed at examining the impact of demographic ageing on macroeconomic growth, on consumption, on savings and on investments and capital forming, on the labour market and on the social security systems. Opportunities to use economic policy decisions in order to cushion the undesired effects of demographic trends – e.g. taxation and changes in contributions – were also discussed.
4. Demographic trends in the Federal Länder in Germany. This detailed regional analysis showed clearly that the trends in the three main components of demographic ageing – fertility, mortality and migration – ran similarly in both the Western and Eastern German Federal Länder, but with differing intensity. These regional demographic differences will continue in the long term, if only because the demographic starting situation in the Federal Länder continues to be different.
5. The transition from gainful employment to retirement, health-related conduct and state of health. On behalf of the BiB, a repeat survey of 3,936 persons was carried out in western Germany in 1998 (1986/1988 = first survey) and of 905 persons in eastern Germany (1991/1992 = first survey), the data set of which has been available for evaluation since 1999. The aim of this survey on "Lifestyles and their influence on health and life expectancy (life expectancy survey)" is to use retrospective and actual questions relating to conduct in investigating the current life situation and the change in living conditions in their impact on the earlier, present and anticipated state of health, including subjective evaluations. A special analysis on this is presently underway at the BiB, asking to what degree the transition from gainful employment

into retirement leads to possible changes in the subjective evaluation of people's state of health. Additionally, it is a matter of examining what links may exist between, on the one hand, the individual's prior professional status (wage-earner, salaried employee, civil servant, self-employed) and, on the other, between their prior working conditions (e.g. long daily working hours, shift work, considerable responsibility for people, etc.) and their state of health on retirement. The results of this survey are intended, at least in part, to close remaining gaps in information and research in the above mentioned area.

6. Module on ageing in the Population Policy Acceptance Survey (PPA II). BiB intends to have the PPA II collected in 2002. The ageing module is to contain, inter alia, the following groups of questions: attitudes on the demographic ageing process; the status of old people in society – an asset or a burden?; personal ideas on housing and on the need for long-term care and assistance in old age; attitudes on the state's future pensions policy; attitudes on possible age at retirement; and attitudes on making the transition into retirement more flexible.

Netherlands Interdisciplinary Demographic Institute (NIDI), the Netherlands:

The paper considers elderly research in the Netherlands initiated after the publication of an EC Ad Hoc Advisory Committee survey on European research in ageing. Reference is made to

1. A six-year program on the determinants of *successful ageing* (started in 1998) with the aim to encourage research on improving the autonomy and self-reliance of older adults;
2. A report published in 1999 on '*generationally-aware*' policy (www.wrr.nl) examines the unequal distribution of economic, social and technological risks across generations and argues that publicly funded pension and health care is not the only form of intergenerational transfer;
3. A programme on the *sustainability of public finances*, including sensitivity analyses for the major determinants of long-term projections for government budget;
4. Bi-annual reports are published on the *status of the elderly from 1993*, e.g. the 1999 report considered older adults of ethnic origin;
5. A ten year *Longitudinal Ageing Study Amsterdam* (LASA) was published in 2000, to provide a basis for developing and evaluating central and local elderly-related policies. (<http://sbg.scw.vu.nl/lasa>).

Ageing issues have been a central focus of the NIDI research programme for several years. Some projects are primarily scientific, whereas others are more directly linked with social policy issues:

1. Older adults' living arrangements and social networks (NESTOR-LSN) (<http://sbg.scw.vu.nl/lasa/lbn>);
2. Ageing without children;
3. The simulation of older adults' kin networks;
4. Regional distribution of eldercare facilities within metropolitan areas;
5. Target groups or wholesale policies for the elderly;
6. Global ageing;
7. Labour market behaviour of older workers;
8. The communicating vessels of early retirement;
9. Ageing scenarios for the educational sector;
10. Periodic survey of opinions on population issues;
11. Changing lives;
12. Diversity in late life.

Istituto di Ricerche sulla Popolazione (IRP), Italy

IRP's research on elderly dates back to the late 1980s. Studies on attitudes towards the third age have confirmed Italians' strong attachment to the family as the expression of

intergenerational solidarity. These areas of solidarity should be resuscitated and supported at policy level, even if the doubt naturally arises as to whether this is also the result of the inefficiency of the public sector to deal with the problem.

In 1999 IRP made a survey on the behaviour of elderly people (4,300 persons aged 60-74) to shed light on their expectations, hopes and fears as regards to the last part of their lives: in particular, concerning retirement, leisure time, and the relations with their children, spouses and friends. In order to better define the subjects of the survey two focus groups were held in Rome beforehand – one with elderly men and the other with elderly women. A lexical analysis was also made on the material gathered in these focus groups. The report summarises the main results of the survey under the following headings:

1. After age 60: adult, elderly, or very old? (change in physical condition, mental attitude and health is emphasised);
2. Work and pensions. (the public image of the pensioner - socially passive, isolated, dependent on health and welfare systems - is being changed for the better);
3. Leisure time: an 'à la carte' menu (lot of new and interesting options, above all for the middle-upper classes, but largely under-utilised, partly because for many people of these generations leisure time was not a necessity but frowned on as a waste of time; activities vary by gender);
4. The family and social relationship (marriage and family are in the centre of the respondents' social life, family relationships are not interrupted when the children leave home);
5. The new technologies (practical difficulties in keeping up with the opportunities offered by electric and electronic appliances and the information society, dependent on age, sex, education and income);
6. The world viewed by the elderly (lexical analysis of texts expresses some inherent frustration: a refusal of being considered as old but still 'living on the margins' of social and productive life; women address more personal, men address more impersonal spheres of life).

Population Research Institute (PRI), Finland:

Research on ageing and the elderly in Finland has four focus areas:

1. Social policy research on ageing (e.g. how to cope with the 'pension bomb' or immigration as a necessary or unnecessary consequence of ageing and early retirement);
2. Comparative research in EU perspective;
3. Research on longevity (improvements in database);
4. Relatively underdeveloped research areas include regional aspects of ageing and intergenerational solidarity (elderly care is regarded primarily as a societal responsibility in Finland).

Research on ageing and the elderly at the Population Research Institute is not a central area. In 1999 a report was written on the income and household arrangement of the aged. This study concluded that:

1. Very few senior citizens consider their economic situation to be bad;
2. In Finland, more often than in other EU countries, the second-most important prerequisite for a feeling of security is good housing;
3. Loneliness and isolation are intimately related issues. Children and other relatives are often thought to be unable or even disinclined to assist their older kin, at least over the longer term. Indeed, senior citizens mostly prefer to use municipal social services rather than seek assistance from children or relatives.
4. Besides a satisfactory income and good housing, senior citizens also need medical and health care. If less money is devoted to health care and services as a consequence of neo-liberal ideas increasingly prevalent in Finnish society, the present and relatively comfortable position of senior citizens could worsen.

As for future research on the aged in Finland, two trends seem to develop:

1. The social policy emphasis of the research will remain, but demographic interpretations will be increasingly integrated into it (for example, through immigration).
2. International co-operation will increase. A good example of this is NIEPS and the joint research it will potentially spawn. With regard to ageing-related research, we should not forget the opportunities for co-operation offered by the Population Policy Acceptance project. There is a lot of discussion in Finland today about whether the so-called 'Nordic Welfare Model' will withstand the ageing of the baby-boomers. We believe that European co-operation will help us create the preconditions that are needed to maintain that model, as well as the preconditions that are needed for the continued quality of life for the ageing that is worthy of a human life.

Department of Demography and Geodemography (KDGD), Czech Republic:

In the 1990s the basic characteristics of the elderly population such as mortality and health status, marital status, urban/rural residence, living arrangements, and mobility/migration have been investigated. Also the socio-economic implications of the ageing process was researched.

Particular attention has been paid to research in the field of chronic and degenerative ailments associated with the ageing populations. Health status is mainly measured by ability tests and individuals' self-assessment. During the past five years surveys on specific causes of disability (e.g. hearing impairment, osteoporosis) and age-associated dementia were carried out and a broader investigation was made into the determinants of healthy ageing.

Besides mortality, morbidity and disability, also patterns of health care utilisation and provision are investigated. Efforts are being made to assess the cost-effectiveness of alternative health care strategies, including that of a broader implementation of preventive measures.

Studies on living arrangements of older persons concentrate on family structures since the family is the major care-provider for older people. In addition to kin availability, research has been conducted on the effects of health and economic resources on the living arrangements of elderly.

Due to earlier rural-urban migration, the elderly population in the Czech Republic became more concentrated in urban areas. Projection studies analysed the future differential growth of the elderly population in urban and rural areas. Data are also being collected on the volume and intensity of migration of older adults.

Studies are also being undertaken on the labour force participation and (early) retirement of elderly people and on their wealth, income and pensions. With respect to policy issues, the research focus has been on the income security of current and future generations of retired population and the financial costs of their economic security.

Institut für Demographie (IFD), Austria :

Research on ageing in Austria dates back to the early 20th century with roots in gerontology. Intensive developments followed in the 1970s and during the 1990s but research situation remains unsatisfactory due to lack of co-ordination and lack of institutionalised interdisciplinary scientific community. There is no systematic documentation. Long-term research and longitudinal data base is particularly missing. On the whole it can be, however, said that the issues of ageing policy and help for the aged are being increasingly dealt with by researchers. The situation of older immigrants is also beginning to attract research interest.

Over and above this, problems associated with material conditions are constantly in the focus of scientific research.

The research experience of the Austrian Institute of Demography (IFD) in ageing is far not so rich as it is in the fields of fertility, migration, mortality and morbidity. Nevertheless, participation in PPA I (1992) and PPA II (2001) enables both international and dynamic comparisons. The PPA module “Ageing” contains the following main issues:

- Attitudes to the demographic process of ageing;
- Evaluation of the position in society of older people;
- Views on housing needs and on the need for help and nursing in old age;
- Attitudes towards the state's future pensions policy;
- Attitudes towards the possible age of retirement;
- Attitudes towards a flexible transition into retirement.

As for the future, IFD plans to set up an “Age-Panel”. It aims to anchor empirical research in Austria with a specific survey design so that basic research may be carried out, a social reporting system established and an internationally comparable data base set up. Three waves of survey are planned to cover a period of nine years and about 3,000 persons of Austrian nationality aged between 40 and 70.

Estonian Interuniversity Population Research Centre (EKDK), Estonia

Research activity of the EKDK was centred around the UNECE project on *Dynamics of Population Ageing in the countries of ECE Region*. Data on ageing was assembled from all previous censuses (from 1881 up to 1879) and micro-data of the 1989 census were used. Data were made comparable over time and space. There has been no survey focussing exclusively on aged population, but the cohort range in the samples of the Labour Force Survey, the Health Survey, the FFS and National Minority Survey covers the conditions of elderly.

In the second round for FFS (GGS), transition into old age is planned to be covered by the main survey, with extended cohort range. The need for surveys focussing on multiple aspects of the status of older population, particularly the oldest old, is well-founded.

Demographic Research Institute (DRI), Hungary

Low fertility and high mortality levels in Hungary explain that until recently demographic ageing was predominantly discussed in the context of decreasing number of children and young active population.

Studies on the elderly in Hungary include specific surveys made in connection with censuses and micro-censuses, household income surveys etc. in order to have information on the demographic composition, economic activity, living arrangements and housing conditions, health status, family relationships and social network of old people – the definition of which varied. The threshold was either put at the age of retirement (which was, for a long period 55 for women and 60 for men) or at the ages of 60, 65, or 70.

The first social-statistical survey of the elderly population (covering retired people living in Budapest) was made in 1963 to study the attitude of the aged towards retirement. In 1965 a specific survey was made on people living in long-term residential social institutions. The first comprehensive study on the elderly population was based on a secondary analysis of the 1968 micro-census and a representative sample survey of the population of retirement age (women born in 1913 and earlier, men born in 1908 and earlier) conducted in 1969. The well structured, detailed questionnaire has been used as a point of reference in similar surveys ever since.

In 1987 the Hungarian Central Statistical Office published extensive quantitative and qualitative information on the elderly (retired population) pooled together from various sources.

A new series of surveys started in 1982 in the co-operation of the Demographic Research Institute and the Mass Communication Research Institute. The inquiry concentrated on opinions and prejudices concerning old age. A block of similar questions was included in a 1989 public opinion poll on various population issues permitting comparison.

In November 1990 the HCSO made a comprehensive survey on the living conditions and health status of people born in 1920 or earlier. Sampling was made on the 1990 census address list, and it involved 4,200 persons.

Since retirement has become an attractive alternative to unemployment following transition, a specific survey addressed this issue in 1994. Questions asked from persons aged 50+ focussed on economic activity, intentions to work, working conditions, risks of unemployment, and planned activities following retirement.

The most recent HCSO study on the elderly (population aged 60+) is based on the 1996 micro-census and the 1998 household survey. The publication summarising the results contains seven papers focussing on: demographic features; economic activity; housing; household and family; family relationships and physical activity; expenditures; economic situation.

Centre of Demography (CDL), Latvia

Research on ageing and elderly in Latvia developed in the 1980s within the framework of the former USSR scientific program "*Prolongation of life*". It was co-ordinated by the Institute of Gerontology in Kiev. A large majority of the collected information was only for official use. In the beginning of the 1990s, the statistical database and classifications of population have changed. Comparability over time became complicated because the special contingent with its staff and family members left the country without appropriate statistical registration. Latvian Civil Population register was established in 1992 and the first census in independent Latvia was carried out in April 2000. Detailed data are not published yet. Due to insufficient quality data on population structures, research focussed on data derived from sample surveys and polls.

Latvia was one of the first countries to participate in the project "*Dynamics of population ageing in ECE countries*" via the Centre of Demography at the University of Latvia.

Several studies (many of them prepared in international co-operation) concentrate directly or indirectly on the aged in Latvia. They include trends in life expectancy, demographic projections, demographic policy options, public health, labour market, household budget, living conditions, way of life, use of time, etc.

The first nation-wide survey of pensioners aged 55+ was carried out by the Baltic Data House in collaboration with the Ministry of Welfare in October 1999. The sample size was 2011 persons. The questionnaire had about 90 questions on living arrangements including socio-demographic and socio-economic issues, social assistance and help received by respondents, security, health and bad habits, communication, perspective, participation in political activities and the use of leisure time.

The first research project on health behaviour among adult population was carried out by the Centre of Health Promotion, using the FINBALT methodology, in 1998. The sample covered 2322 persons aged 16-64. The mailed questionnaire contained 87 items and 9 subsections. The survey was repeated in 2000.

Some projects on the elderly are carried out by medical scientists. The 1997 study of the Institute of Cardiology focussed on the prevalence of cardiovascular diseases and risk factors in Riga population as well as on the evaluation of health care costs. The study was based on a random sample of 3500 persons aged 20-69. The survey applied methods approved by WHO. The study of Health Statistics and Medical Technology Agency on "Morbidity of Latvian population associated with the availability of health care and health insurance" focussed on able-bodied population up to the age 65. The Medical Academy of Latvia carried out the project "Estimation of changes in the biological status of Latvian population by anthropometric and environmental factors" which studied changes of growth process in children and youth population during a long-term period. Another project named "Investigation of biomechanical features of human coronary, main brain arteries and developing of novel vascular grafts" empirically defined the biomechanical features of human coronary, main brain arteries in men and women aged up to 80.

Institute of Statistics and Demography (ISD), Poland

Poland participated in international projects on ageing in the 1980s and 1990s:

1993-1995 WG "Planning and Technology" under COST ACTION A5, EC.

1988-1991 Project „Social Security, Family and Households in Ageing Societies” IIASA.

1983-1991 Project „Demographic and Socio-Economic Aspects of Population Ageing”. CICRED.

1985-1991 Project „Economic and Social Implications of Changing Age Distribution in the Selected ECE Countries” PAU, EC., UNFPA.

13-15 December 1999. Conference "*Status of the Older Population: Prelude to the 21st Century*", *Sion Switzerland* organised by PAU ECE UN, Institut Universitaire Kurt Bosch (IKB) and US National Institute on Ageing (NIA).

3-5 July 2000. Meeting "*Generations and Gender: Research into their Behaviour and Quality of Life*", *Geneva, Switzerland* organised by PAU UN, ECE.

Future international projects should:

concentrate on a few selected research topics;

include surveys;

employ in-depth studies based on comparable questionnaires;

elaborate demographic projections;

analyse the economic efficiency of pension schemes.

The Second Workshop on ageing, intergenerational solidarity and age-specific vulnerabilities

This Workshop was organised by the Netherlands Interdisciplinary Demographic Institute (NIDI) and was held in The Hague on 27-28 September 2002.

The Workshop had as main objectives first to deal with the policy implications of population ageing and more in particular with its repercussions for intergenerational transfers and, second, to reflect, on the basis of the outcome of the Technical Meeting on Ageing, Intergenerational Solidarity and Age-specific Vulnerabilities on possible future cooperative research in Europe. For the first issue, the organiser focused the Workshop on three public policy contexts: pensions, active ageing and health and welfare care.

The discussions at the Workshop were first introduced by solicited papers:

Creation of a good pension system: A challenge for Europe (presentation by Marek Marek Góra, Warsaw School of Economics, Warsaw, and discussion by Casper van Ewijk, Netherlands Bureau for Economic Policy Analysis, The Hague);

The future of pension systems (presentation by Michal Rutkowski, World Bank, Washington, and discussion by László Habliczek, Demographic Research Institute, Budapest);

EU policy for older workers (presentation by Philip Taylor, University of Cambridge, and discussion by Kène Henkens, Netherlands Interdisciplinary Demographic Institute, The Hague);

Active ageing (presentation by Irene Hoskins, World Health Organisation, Geneva, and discussion by Giuseppe Gesano, Istituto di Ricerche sulla Popolazione, Rome);

Healthy life expectancy (presentation of Jean-Marie Robine's paper by Emanuelle Cambois, Institut national d'études démographiques, Paris, and discussion by Katalin Kovács, Demographic Research Institute, Budapest);

Differences in older adults loneliness and depression across Europe (presentation by Theo van Tilburg, Vrije Universiteit Amsterdam, and discussion by Thérèse Jacobs, Population and Family Study Centre, Brussels).

Next, the Workshop discussed the report of the Warsaw Technical Meeting on future European research co-operation in the field of population ageing (presentation by Irena Kotowska, Institute of Statistics and Demography, Warsaw).

The executive report on the Workshop was prepared by Irena Kotowska (Institute of Statistics and Demography (ISD), Warsaw). The proceedings of the Workshop were published by the Netherlands Interdisciplinary Demographic Institute (Dykstra, 2003).

Pension systems in the EU and CEE countries and the future of pension systems

Marek Góra's presentation on the creation of a good pension system in Europe starts by reminding us that the traditional pension systems in Europe were created a long time ago, when few workers retired because of high mortality. Moreover the systems were designed on the assumption that the relatively stable demographic structure would last forever. However, the demographic structure has changed substantially in the last decades of the 20th century and is expected to keep changing. The demographic dependency ratio is, on average, expected to more than double by 2050 in the OECD countries.

The old-age pension systems were designed to divide the current GDP between the working generation and the retired generation. The method of a division of GDP defines the pension system itself while the value of GDP to be divided determines externalities. The public defined-benefit pension schemes (DB scheme), predominantly funded on a PAYG basis, strongly depend on the contributors-beneficiaries relation. They are sustainable if the demographic situation is stable in the long run. However, in the short run the part of GDP

paid to the retired fluctuates. It means that contributions go up and down, so the individuals of consecutive generations are unevenly burdened. This may cause a kind of generation cycle in employment and GDP growth. The system is unsustainable if there is a long-run growing tendency in the scale of redistribution from the working generation to the retired generation. The DB system degenerates to the social tax system that creates strong undesired effects on employment and the GDP rise.

The increase in life expectancy as well as improvements in the health status of the elderly population, faced by more and more countries, changed the pension system objective – from transferring money to the old people, unable to work, to income allocation over the life cycle. Since the probability to retire is now close to one, the economic nature of participation in a mandatory pension system is similar to savings rather than insurance against the old-age risk.

Population ageing, foreseen to accelerate in the future, creates a strong pressure on the social security system, especially on pension systems. They promise much more than they actually provide. Pension debts reached high levels in EU and EUA countries. Servicing these debts is impossible unless contributions or taxes are increased. However, high tax wedges devastate labour markets and economic growth.

Despite widespread rationalisation of the pension system in the OECD countries old-age pension expenditures are expected to increase by roughly 50% on average till 2050. Also, a weak economic growth observed in many countries is partially an effect of the inefficient functioning of the traditional pension systems in these countries. Moreover, the increased fiscal burden would contribute to probably even weaker economic performance in the future.

Economists used to treat the pension debt as a kind of a “soft debt”. It is not soft any more. It is worth mentioning that in the majority of OECD countries the pension debt is much larger than the open debt. The author strongly advocates for a public debate on the unsustainability of the DB schemes, including also waiting costs, i.e. costs of delays in pension reforms. Turning the traditional pension system into a system, which automatically adjusts revenue and expenditure, is the only reasonable reform option. A new system can use financial markets or not. There are different externalities of choices. Probably the best is a mixture of both possibilities.

Further Góra argues that the current national pension systems partially prevent free movement of labour throughout the EU. If we want to promote free movement of labour – one of the key principles of the EU - the pension systems in Europe will have to be integrated, i.e. put out of the national fiscal policies. Traditional pension systems will have to be terminated and replaced by new ones based on individual pension accounts.

Finally the author attempts to sketch the key features of a good pension system. In his view, economic neutrality is the key feature of a good pension system. The neutral pension system will provide European citizens with pensions not creating strong negative externalities. The author develops a formal model, which describes such type of pension systems.

Discussant Casper van Ewijk agreed with the opinion that pension systems cannot be perceived as social protection systems. However, in their changes towards a neutral system not only the distribution among generations but also insurance issues have to be considered. The system has to be robust to demographic risks. In reforming pension systems it is necessary to separate public (social security) and private (savings and investments) components. He stressed the need to discuss pension reforms within a broad framework of the welfare system in terms of distribution of work and leisure over time for the longer life.

Future of pension systems

Michał Rutkowski is of the view that pension systems around the world are in the stage of crisis primarily because of population ageing. Population ageing is not only a European, but a world-wide phenomenon. Although the pressure from ageing affects both pension and health

expenditure, the impact is not equal. Pension expenditures appear to be more influenced by the demographic structure of societies.

The causes of population aging have to do both with decreases in the fertility rate and increases in life expectancy, especially at the age of 60, a key variable for pension systems. As a result of those developments the old-age dependency ratio is going to worsen considerably, increasing the strain on pension systems. This situation poses two very important questions for policy makers: how realistic are the underlying demographic assumptions and what can public policy do to deal with the above trends and reduce the effects of the demographic trends. The author considers the first question very hard to answer, as there has been a persistent underestimation of life expectancy throughout the twentieth century, and some alternative estimates predict a gain in life expectancy of some three to six years above the official data. Moreover, he esteems that the total fertility rate may stay below the replacement level.

Rutkowski is of the opinion that policy measures to increase fertility rates have not been very successful. Although there may be some room to reduce the opportunity costs of motherhood through, *inter alia*, making sure that pension rights are earned during the motherhood period, by and large, one should not expect significant changes as a result of pronatalist policies. Similarly, increases in migration can help stabilize the total population size but does little to reduce the actual ageing.

Rutkowski esteems that the consequences of ageing for social protection systems are going to be quite serious. On the one hand, there will be an increase in expenditures on old-age income provisions, health care and long-term care. On the other hand, expenditure pressures on child care, maternity benefits, and, perhaps, unemployment benefits, are likely to be reduced. Important changes, however, will be required within those programs, especially within the retirement pension system.

As far as the retirement pensions systems are concerned Rutkowski considers flexibility as the key issue in responding to the demographic changes. All other measures, such as introducing partial prefunding, increases in labour force participation, increasing retirement age, reducing benefits, etc. do not address the key issue which is that along with demographic changes, there are changes in education/work/life patterns happening worldwide, especially in industrialized countries, including Europe.

The author observes that a lot of hope is often associated with the prefunding of pensions. However, the prefunding of pensions is – *per se* – not a leeway for coping with the ageing of populations, as both unfunded (pay-as-you-go) and pre-funded pensions need the next generation to complete the inter-generational contract. In the case of unfunded pensions the intergenerational contract requires paying pension contributions to finance the transfer, while in the case of funded pensions it requires buying assets from the older generation. However, the evidence so far indicates that having a funded part of the pension system brings important pro-growth externalities and helps to deal better with demographic, economic and political risks, thanks to a diversified nature of the pension system, and to better insulation from day-to-day political impacts.

Moving towards more flexible pension systems is also needed because of labour market changes. They require flexibility between education, work and retirement spells over the life cycle, incentives for life-long learning and labour mobility between professions and member states. In reality, however, the situation is not rosy, as pension issues are not yet fully on the world or European Union agenda, the pension schemes are fragmented and largely unreformed, and any discussion and tough decisions on harmonization/coordination needs have, so far, been avoided.

Next Rutkowski raises the question what are the main elements of a flexible pension scheme? First and foremost, it has to be a scheme that closely links contributions and benefits in a

framework which is actuarially fair, that is, which does not lead to incentives to retire early or late and which, instead, makes the choices neutral and therefore dependent on individual preferences of the participant. Defined contribution funded schemes are by definition like that. However, it is also possible to build a PAYG DB scheme that bases pensions on lifetime contribution records and introduces actuarial increments and decrements for late or early retirement. Recent Italian and German reforms go in this direction. Some of the attempts in Europe, in Sweden but also in some EU accession countries, such as Latvia and Poland, go even further in the direction of flexibility of PAYG schemes by introducing an idea of notional defined contribution (NDC) systems.

An NDC pension system mimics a defined contribution system, except that it stays unfunded with contributions immediately used to pay current pension benefits. Every participant has his or her own individual account, where his or her contributions are recorded and notional interest rate is credited. At retirement, the pension is calculated by dividing accumulated amount by life expectancy at the age of retirement, a so-called “G-value”.

Rutkowski argues that an NDC system is not easy to run. It requires good capacity to run individual accounts and making choices about the notional interest rate, G-value, as well as reserve funds against demographic shocks. However, an NDC system also has a unique capacity to introduce modern and affordable pension systems, at least in EU countries, where the institutional capacity is relatively high. Introducing NDC can break reform deadlocks, as it responds to main postulates: fairness, transparency, and links between contribution and benefits. It makes harmonization between different occupations easy, as pension rights can easily be carried across. It facilitates labour mobility between EU member states. Last but not least, it could be easily integrated with funded schemes as the NDC logic is extremely close to the logic of funding. In a world of lifelong learning, changes in professional careers, and large movements of people, and in a world of high transition costs of introducing funded schemes, an NDC scheme is a big opportunity and hope.

All this suggests, argues the author, that the demographic problems are really not insurmountable, but they need an open public discussion about issues and reform options followed by policy decisions. This discussion is likely to lead to a support for partially funded pension schemes using an NDC principle in its unfunded part. This would be an important step forward. To start, however, in the current and future enlarged EU, the demographically-induced reform need to be debated at the same level of importance as reforms resulting from establishing fully integrated markets.

In his discussion László Habcsek argues for a more in-dept look in the components of ageing (low fertility, high life expectancy, negative net migration, old age-composition of migrants, and the initial age structure). The new ageing wave in this century requires careful analyses of long-term demographic change, different ageing patterns and redefining of the age burdens of the working age population. Population dependency ratios should be linked to the size of the age groups. Pension system perspectives depend mainly on the contributors/beneficiaries ratios that are affected not only by population ageing but also by labour market developments. Labour force participation rates are relatively high but decreasing in the EU countries and low in the EUA countries. Under the high degree of under-utilisation of labour force, widespread across Europe, conditions for an increase in demand for labour, which would be met by increased economic activity rates, should also be debated.

Habcsek is of the opinion that a need for a multi-pillar system with a funded pillar cannot be deduced from the demographic challenges. The PAYG systems can also be adapted to the foreseen changes. The EUA countries are additionally facing problems related to transition effects. Rapid increase in the number of pensioners, declining employment, rising numbers of self-employed, shrinking number of contributors resulted in dramatically growing system dependency ratios. However, expectations still exist that „the state solves the problem”.

Preparing for a long life: Older workers and active ageing

Older workers

In his presentation on “European Union policy for older workers” Philip Taylor first sketched past trends and prospects of labour participation of older adults against the background of the increasing ageing of the population and more particularly of the population of active age. In most EU member states there has been a marked decline in labour force participation rates among older men in recent decades. However, first signs of a slow-down, stabilisation or even a reversal can be observed, more particularly among those in their fifties. There are also striking between-country differences. In general, EU lags somewhat behind the US and strongly behind Japan.

The picture for women differs from that of men in two respects: in most countries labour participation rates of older women still lie substantially below those for men, but those rates are increasing instead of decreasing, as a result of the increasing propensity of successive age cohorts of women to work, at least among the younger old.

Taylor identifies several possible causes for the early exit trend: the establishment of pre-retirement schemes to facilitate the exit of older workers in view of creating jobs for younger people, although these schemes have provided few job opportunities for younger workers; the attitude of employers regarding the performance of older workers as being lower, despite evidence that their higher earnings may be compensated for by their accumulated experience and greater know-how; ill health being one of the most important reasons for early retirement; the attractiveness of life in retirement, creating opportunities to take up a secondary career, undertake voluntary work or to enjoy (new) hobbies; the negative attributes of jobs in later life.

Next, the author dwells on the emerging new public policies aimed at extending working life at older ages. He sees several drivers for this policy change: demographic ageing, high levels of pension costs, increasing or expected labour shortages, the weak effect of early retirement on the provision of jobs for younger workers, the general shift from passive to active employment policy, and the recognition that employment problems should be tackled directly rather than offloaded on to the state. However, he esteems that, despite the increased focus in the European Employment Strategy on the need to prolong working life, there has so far only been limited progress on the development of policies on active ageing.

Finally, Taylor examines the implications for future public policy. He advocates the development of a holistic policy in which employment, retirement, health and welfare policies are integrated, promoting at the same time increasing employment opportunities for older people, reducing too easy exit pathways, and protecting the most disadvantaged and vulnerable workers. An integrated policy should also include a life-long learning strategy and an awareness raising strategy focused on combating prejudices and negative attitudes towards older workers. Future policies should also take into consideration the diversity existing among older people in fields such as sector of employment and occupation, health and family circumstances, and consequently foresee flexibility in retirement and employment provisions.

In his discussion of Taylor’s presentation, Kène Henkens mainly examines why the success of policy reforms aimed at raising the retirement age is quite limited. He esteems that policy makers are very reluctant to introduce harsh policy measures because of the danger that the most obvious and effective reforms could create new vulnerable groups of retirees and/or hamper the employment prospects of other vulnerable groups on the labor market. Moreover, older workers who are at risk may be forced to extend their working career involuntarily, prompted by a lack of financial resources. The emphasis in most countries is therefore on introducing painless reforms; measures that may stimulate older workers to retire later, but leave the social protection element largely untouched.

Henkens sees two major ways to introduce painless reforms: include long transition periods in the pension reform plans and stimulate older workers' participation by giving them fewer obligations and more privileges, such as additional leave, increased holiday entitlement, a workload reduction, age limits for irregular work, or exemption from working overtime, part-time retirement regulations. Many older workers do not simply retire because the workload is too high, but because the content of jobs and tasks and the work environment have nothing new or rewarding to offer anymore. He concludes that the success of raising participation levels of older workers will largely depend on the extent to which labor market conditions will make the older worker an essential part of the work force.

Active ageing

“Active ageing and health” was the subject of Irene Hoskins' paper. She focused her presentation mainly on the new WHO approach to enhance health and to further compress morbidity at high age by promoting active ageing which is defined as “the process of optimising opportunities for health, participation and security in order to enhance quality of life as people age”.

A major change in the WHO paradigm of the last decades is the shift from viewing issues surrounding ageing as those pertaining only to a specific chronological age group to an approach which explicitly recognises the process of progressive change in the biological, psychological and social structure of individuals throughout the entire life course. WHO's unit dealing with ageing issues is presently called “Ageing and Life Course”.

The life course approach to ageing first of all recognises that older people are not a homogeneous group and that individual diversity tends to increase rather than decrease with age. Secondly, it acknowledges that interventions creating support environments and fostering healthy choices are important at all stages of the life course and lead to better health in later life. As individuals age, non-communicable diseases such as coronary heart disease, stroke, and diabetes become the leading cause of morbidity, disability and mortality. Known risk factors such as unhealthy diet, lack of exercise, and tobacco use which are associated to high blood pressure, obesity and dyslipidemia, should be decreased in the course of the entire life span.

In his discussion paper “Old-age from ‘medicalisation’ to ‘active ageing’”, Giuseppe Gesano first reminds us of the various groups of ailments which prevail in old age, and more particularly those which are not behaviourally induced. He also recalls the fact that, under pressure of the midlife-centered models of health, elderly people are less and less able to accept that a progressive decline during the ageing process is normal, nor to learn how to live with the increasing ailments of the old age.

Next he argues that the life course approach to active ageing cannot resolve all health problems of old age. In his view, this approach entails the danger of conceiving the health problems of the aged in a too individualistic way and to reduce the responsibility for one's health or illness to the individual's life history. Cultural, socio-economic and environmental living conditions and historical processes play also a considerable role in the emergence and development of disease patterns among older people. This is more particularly the case in developing countries, in countries in transition and among the poor in the more advanced developed countries. Holding people individually responsible for their health status might e.g. disguise the effects of the reduction in public medical care that have occurred in the eighties and nineties in most eastern European countries. Also, the restructuring of public welfare care and the privatisation of health services, which are about to be enforced in some western European countries, might have similar effects, surely at a lower scale, but probably reversing the positive trend in health which has been lasting for more than a century.

Finally, the discussant draws attention to the worsening of the global and local environment and the increasing insecurity in our way of living that may unfavourably influence the elderly

people's health status. More than charging old people individually with the relevant responsibilities coming from their present and past behaviour we should charge present active and ruling generations for having created living circumstances and models of life which are detrimental to a long-term healthy lifestyle. He concludes that the world-wide ageing population problems call for realistic and diversified interventions on the general and specific causes of unhealthy and unhappy old-age.

Health and welfare: healthy life expectancy and subjective well-being

Trends in health expectancies

The paper of J.M. Robine, I. Romieu and J.P. Michel, presented by Emmanuelle Cambois, gave an extensive overview of the recent trends in the relation between life expectancy (LE) and disability-free life expectancy (DFLE) in developed countries for which such time series are available. The authors first sketch the historical background of the REVES (*Réseau Espérance of Vie En Santé*) network, the aim of which is to gather and interpret internationally standardised chronological series of disability-free life expectancy. Earlier studies, indeed, had fuelled the hypothesis that the increase in life expectancy at higher ages in the second half of the former century was accompanied by an increase of years in disability.

The detailed overview of the trends in DFLE in North America and North-Western European countries in the last quarter of the former century reveals contradictory results. Whereas the increase in LE at age 65 appears to be universal and regular in the low mortality countries, DFLE – all disability levels combined – appears to have roughly stagnated. More subtle results are obtained when the data are differentiated according to the time period, the degree of disability, the type of behaviour, the educational level or occupational activity: in recent years the increase in life expectancy seems to be accompanied by a pandemic of light and moderate, but not of severe disabilities; people with lower risk behaviours (no smoking, appropriate diet, physical exercise) experience fewer years of disability before death; higher educational levels and tertiary sector occupations are associated to larger increases in disability-free life expectancy. It is expected that improving levels of education, improving nutritional status, better working conditions and better health behaviours will improve the functional abilities and performance of essential activities of daily life of future generations of older people and may lead to a further compression of disability in later years of life.

In her discussion Katalin Kovacs presented some results of studies on mortality in Hungary, which illustrate the positive impact of education on life expectancy.

Loneliness and depression

Finally Theo van Tilburg briefly presented some results of international comparative studies on loneliness and depression among older adults across Europe. Feelings of loneliness are present in a minority of older people, but there are wide variations between countries. A systematic finding is the significantly higher prevalence of loneliness in Southern European countries compared to North-West countries.

Analyses based on data from the World Values Studies show that, after controlling for individual variables (marital and parental status, self-reported health, socio-economic status, education, and gender), loneliness still varies between countries. However, several aspects of social integration, such as participation in personal networks and organisations were not included. Analyses carried out on data from the European Value Study, focusing on religion and religious activities, revealed that regular church attendance is related to a lower prevalence of depression but country differences still exist. A third study referred to analysed the association of feeling of loneliness of elderly people living alone with the frequency of living alone in the country: people feel more often lonely in countries where single

households are less frequent. The results corroborate the hypothesis on the interplay between individual experiences and the societal context.

Discussant Thérèse Jacobs considers loneliness and depression to be relevant social problems. The Madrid Plan of Action and the Berlin Regional Plan implicitly mention them in relation to health and quality of life. Also the WHO has launched an initiative on depression in public health in order to, *inter alia*, increase an awareness of this problem. Loneliness and depression are important research subjects that bring the quality dimension in demographic analyses.

Jacobs esteems that some conceptual clarifications are needed. She expresses doubts about the desirability to analyse loneliness and depression together and even to treat them as proper indicators of well-being. Depressed people not always feel lonely, and loneliness of depressed people cannot be grounded only in loss of contacts and/or in a deficit of quality of contacts. Even extremely well surrounded persons can become depressed. Similarly, lonely people are not always depressed.

The discussant also comments the North-South paradox. She is inclined to believe that the cross-country differences will disappear when older persons will share the same opportunities for building social relations and participating in social life. In her view, not the socio-economic structure is a problem, but the fact that in some countries family life monopolises social relationships. When family life becomes less intensive, loneliness is a consequence. This hypothesis, however, requires much better and more precise measures of social participation and social capital.

Finally, Jacobs argues that one cannot expect changes towards standardisation all over Europe. Coping with the harshness of life could be linked to socialisation processes with deep roots in culture and tradition.

Proposals for future comparative research

The Workshop discussions on possible future comparative research in Europe in the field of ageing, intergenerational solidarity and age-specific vulnerabilities was introduced by the report of the NIEPS Technical Meeting drafted by Irena Kotowska in co-operation with Janina Józwiak and Ewa Fratzak (Institute of Statistics and Demography, Warsaw School of Economics). The NIEPS Technical meeting was held in Warsaw on 27-29 September 2001.

The results of the NIEPS Technical Meeting

The Technical Meeting on Ageing, Intergenerational Solidarity, and Age-specific Vulnerabilities undertook an in-dept examination and evaluation of recent surveys and worked out a framework for a future comparative large-scale sample survey on people of higher age in Europe. This survey should be embedded in a broader research project including a contextual analysis of demographic ageing and policies related to ageing and living conditions of elderly and the formulation of policy alternatives and their potential impact.

The Technical Meeting proposal includes an outline of the contents and structure of the survey questionnaire and the sample composition.

As far as concerns the contents of the survey the following major domains were identified: living conditions, family/intergenerational relations, including intergenerational transfers, economic and other activities, health, disability and autonomy, well-being, supply and demand for care, self-perception of ageing, and background information on socio-demographic variables and values. For some of those domains major life events should be recorded in the form of life histories.

The questionnaire should be conceived in a modular form, each module corresponding to major issues that should be investigated. In each module policy relevant questions should be included. Wherever appropriate, both subjective and objective measures should be used.

The survey should be coordinated and integrated, but not merged with the survey on gender, family and work that NIEPS proposed in its second Workshop on 'gender, family building and work patterns. The survey should also include a common core of background and other covariates with both the surveys proposed on the two other NIEPS themes. The new survey should, in specific segments, be comparable to the major surveys that were undertaken by NIEPS partners in the past.

The survey should address independent samples of men and women in the age range 50-89 (i.e. complementary to the age range 15-49 fixed in the NIEPS proposals for a comparative survey on gender, work and family).

Framework for a future comparative survey on elderly in Europe

The Workshop endorsed and amended on some points the proposals of the Technical Meeting on the organisation of a future comparative large-scale sample survey on people of higher age in Europe, associated to a policy sensitive contextual analysis.

The Workshop is aware of the fact that some countries have already organised specific surveys on aged, whereas others investigated the older population as part of general surveys on demographic questions, health or well-being issues. A lot of information is already available that undoubtedly needs further, more thorough analysis. However, a profound international comparative analysis is only possible on the basis of the use of a common methodology with respect to contents of the research, the samples to be investigated and the analysis to be performed. Moreover, a real international comparative study requires international research teams.

Although the Warsaw Technical Meeting relied upon a number of recent survey instruments, it is considered of great importance that future co-operative initiatives should carefully screen all ongoing research activities and that, in case of a future initiative, the European national population institutes should involve specialised social-gerontological institutes in the different countries.

4. CONCLUSIONS AND POLICY IMPLICATIONS

The conclusions regarding the three themes addressed, namely gender, family and work, specificity and integration of migrants, and ageing and intergenerational solidarity, as they result from the presentations, the theme-specific discussions and the general debates can be summarized in the following clusters: (1) issues addressed and main findings, (2) research policy implications and (3) social policy implications.

GENDER-RELATIONS, FAMILY BUILDING AND PATTERNS OF WORK

Issues addressed and main findings

NIEPS took stock of substantial achievements that have been made in gender equity and equality during the past century. The gender perspective and the empowerment of women are increasingly recognized and pursued as important societal goals. However, the setting up of a facilitating framework by means of integrated policies and measures still varies significantly across Europe. Parallel to the achievements there are clear indicators of persisting gender inequalities at the detriment of women. The relevant data to document the impact of inequalities are often incomplete and poorly comparable across countries and do not allow for the development of informed policies.

The two key domains through which gender inequities and inequalities are manifested relate to work patterns and family dynamics. It appears that for increasing proportions of women the pursuit of one's place in the workforce in terms of timing takes precedence over family formation.

Female labour force participation is increasing, in particular in countries in which it was traditionally low, and the between-country differentials in this respect are decreasing. However, there are still persistent inequalities in the position of men and women in the labour market regarding wages, professional segregation, job security and unemployment risk. The weaker position of women in the labour market does not always result from differences in educational attainment but is also associated with differences in job structure by branch and employment status. Women are less and less willing to drop out of the workforce after childbirth. Different patterns in labour force participation after childbirth can be observed throughout Europe and appear to be associated with both labour and social policies. The increasing female availability on the labour market is also reflected in the increasing female unemployment. A growing proportion of women at younger ages tend to give higher priority to achieving professional inclusion than early motherhood.

Indeed, family formation, both in terms of marriage and childbearing is increasingly postponed towards older ages. Non-marital cohabitation and Living-Apart-Together relations are becoming a standard phase at specific stages of the life course of increasing proportions of individuals, more particularly in advanced welfare states. An increasing number of children is born outside marriage mainly as a result of the spreading of new family forms. Fertility remains below long-term generational replacement, albeit with strong between country-differences with lowest levels observed in the Southern European and transition countries. The analysis of the impact of radical structural transformations rather than the 'preference theory' appear to provide better insight into the recent extremely strong declines in fertility levels in the countries in transition.

Combining family life and labour force participation continues to be difficult in most countries, in particular for women. Part-time labour is pursued by large numbers of women in order to reconcile family life and paid labour. Institutional support aimed at correcting market

mechanisms continue to be necessary to improve the interaction between gender, family and work, especially with regard to neo-liberal economic developments that are leading to increasing work pressures and 'flexibilization' in favour of employers rather than for the benefit of employees. A typical example is part-time working, which may be experienced as an opportunity by a significant proportion of women in countries where the state has a strong mediating role between market and citizens by both protecting part-time workers in terms of social insurance, working hours and working conditions and providing affordable child-care facilities for working mothers. Part time work, however, remains a 'no-choice-condition' in countries with weak public support to families and is frequently associated with unconventional working hours and poor or no work-related insurance-based social security for women.

The burden of childcare and housework are still disproportionately on the shoulders of women. Combining work and family appears to penalise women, whereas it favours the position of men. Given the gender inequalities women experience or perceive regarding within-family relations, more and more women give precedence to their professional commitments. Unemployment contributes to the postponement of childbearing as women tend to wait to secure a job before having a child. Structural factors, particularly relating to the labour market, prevent or do not encourage men to invest more time in family life and consolidate the gender divide more particularly regarding family care functions. Several recent demographic processes, such as couple dissolution and increasing sexual differences in life expectancy, combined with differences in employment history and levels of insurance based benefits accumulated in gainful employment, contribute to the feminisation of poverty.

Childbearing is becoming increasingly dependent upon the labour market situation, with women seeking to establish their place before having children. There appears to be a marked increase in incompatibility between work and family particularly at the arrival of the third child. In advanced market economies fertility is lowest in countries where it appears to be more difficult for women to reconcile employment and childrearing.

Well-defined and integrated social policies appear to alleviate the incompatibility between labour force participation and family life. Improvement of the position of women in the labour market and strong family friendly policies and measures facilitate childrearing and enable women to have the number of children they wish. The different value orientations regarding family formation both at individual and societal level impact gender relations. However, the latter are not only a question of value shifts, but also of societal security and of state support.

Female labour participation is increasing and appears to be an irreversible phenomenon requiring profound societal adaptations and changes in male attitudes and behaviour. The societal (and male) lagging in adapting to the new roles women are performing often forces women to adopt strategies in the fields of production (part-time work) and reproduction (postponement of births, fewer births) which, ultimately, result in perpetuating gender inequity on the one hand and below replacement fertility on the other.

The increasing female participation rates bring to the fore the questions of the reconciliation between family and work and gender equality. Women's labour participation must be considered to be an irreversible trend to which societal structures and processes will have to adapt. Enrolment rates of young women in secondary and post-secondary level education imply that the overwhelming majority, if not all are preparing themselves for gainful employment. There is a striking positive relation between the higher level of education and the workforce participation of mothers with young children.

Reconciling family life with work patterns is a major and increasing challenge in modern society. Contemporary policies in the EU on family and employment contain important elements of contradiction: neo-liberal economic developments resulting in increasing

performance pressures and labour market flexibilisation are promoted alongside the encouragement of family-friendliness in employment.

In view of the high proportions of women and men attending post-secondary levels of education, reconciling higher education with family formation by opportunity enhancing public policies and measures may be an option to be examined in view to remove obstacles to childbearing among young adults in their 20s.

Policies regarding (low) fertility are shifting from traditional family policies, supporting the male breadwinner/female homemaker family model to policies aimed at reconciling family and work obligations and then to genuine gender equity. Existing policies concerning the reconciliation of family life and work patterns succeeded in enabling women to behave with respect to employment more like men, but are less successful in encouraging men to behave more like women regarding commitment of time to household work and child care.

Policy goals and implemented policies with respect to the relations between gender, family building and work and their mutual relations vary between and even within countries in Europe. So far the documented effects of traditional family policies on fertility have been weak. There are few, if any, policies aimed at making the task division in the household more equal.

Fathers today do, however, devote more time to childcare, than did older generations of men, more particularly in the most enjoyable activities like playing and reading. On the whole, however, men have changed less than women who still devote much more time to household tasks, even when full-time employed.

Care for elderly is becoming an important issue in relation to the division of work between women and men. The high demands placed on families in the context of weak public support are a cause for dissatisfaction and general stress, more particularly among women, since much of this care provision comes from a gender-based division of labour both within the family and the labour market.

The societal lagging in adapting to the new roles women have adopted in the workforce forced women to adopt a strategy of postponing births, reducing the number of children and/or reducing the number of hours in paid work. The incompatibility largely experienced by women between family duties and work can be considered as one of the major causes of below replacement fertility levels in Europe.

However, the recent strong fertility decline in the transition countries is to be interpreted also as a behavioural adaptation to a transitional crisis situation.

Research policy implications

The overview of the interaction between the issues addressed shows that there are important new developments that need to be addressed in research.

Gender relations, family building and labour force participation are increasingly subject to research but are fragmented as separate topics and/or lack multidisciplinary approach. Likewise, the effects of existing policy measures on gender equity, family life and work and the needs for new forms of integrated public support remain under-researched areas.

There is a clear need for an all-European synergy in view of developing comparative research projects based on micro level data collection and other research instruments. Lack of adequate data sources to address the interrelationship between gender equity, work and family life are particularly felt in transition countries. Many of the ongoing societal transformations as they affect families are not properly documented. Thus the development of informed policies based on the analyses of needs and preferences is lagging behind.

The possible emergence of a divide between people who choose not to have children at all and families with children and its consequences for individuals, families and society is a pressing issue for future research.

The changing role of fathers appears to be a disputed area: some argue that modern society is confronted with a 'shrinking fatherhood', others perceive signs of the emergence of a 'new fatherhood'. The role of men in family building, childrearing and family care needs to be more thoroughly investigated.

The current sequence of events in the life course of young adults – long studies, pursuit of a stable job, acquisition of modern consumer durables in conjunction with the enjoyment of leisure opportunities modern culture offers or imposes – pushes childbearing up to higher ages at which women get increasingly confronted with bio-medical problems (subfecundity, genetic impairments) or/and where getting children interferes with established non-child oriented lifestyles and customs. Research is needed to explore the possibilities of assisting people to adapt the sequence of events related to work, leisure and family building in a life course perspective.

In general, all three main domains, gender relations, work and family building, and their interrelations, need to be more intensively studied in a life course perspective. They need to be addressed also in view of value orientations that may change in the course of the family building and labour career processes and of policies influencing behavioural outcomes.

Research about gender, family and work need to deal with these issues in a comprehensive manner, paving the way for informed policies to meet the needs related to maternity, childbearing, childcare, family care and work in an integrated way, including also the broader societal context and background in which people are living. Research on gender, family and work needs also to address broader family and kinship networks.

Theoretical and methodological challenges that require a more in-depth approach in future research on the relations between gender, family and work pertain to:

The undertaking of more theory-driven research with respect to the interrelations between the three domains;

The development of the methodology of gender research;

The improvement of the methodology of comparative research;

The recording and analysis by means of event history methods of the interrelations of the biographies of gender relations, family development and work;

The recording of larger numbers and more diversified and new types of co-variables, among others in the domains of values and norms and political elements, in survey and other research pertaining to gender, family and work.

In reviewing the available data and their quality, NIEPS stressed the need for the development of comparable indicators and co-ordinated data collection and analysis at the all-European level. Allocation of appropriate resources, especially in countries in transition, is a necessary prerequisite for both scientific and policy development breakthrough. Statistical data and scientific knowledge on the interactions between gender, family and work are unevenly developed across Europe, and are particularly weak in Eastern Europe. Consequently, future comparative European research should actively involve Eastern European countries, many of which are a long way behind in micro-level research on gender, family and work and are confronted with profound socio-economic and demographic changes.

NIEPS endorsed the proposals of the Technical Meeting on Gender, Family Building and Work Patterns to organise a new and innovative comparative all-European large-scale sample survey on gender, work patterns and family building in which the latter is ultimately aimed as the dependent dimension. This new survey should be conceived in an interdisciplinary way and hence should not only involve population institutes, but also institutes in gender studies and in work relations.

It was agreed that this Network works towards developing and implementing a coordinated survey with a European added value targeted on gender, family and work, as an alternative to a series of national surveys. European resources are necessary to develop a European research area.

Social policy implications

In view of the implementation of standard setting norms recognised at the European and national level regarding gender equity and equality, enhancement of family choices and work opportunities, major inputs are needed to reconcile family needs and work patterns which may also contribute to bringing fertility levels closer to generational replacement. A gender perspective in policy-making leads to a better policy and to social progress.

Women need to be encouraged to acquire skills and pursue career in more technical and specialised fields in order to avoid exclusion from better paid and more secure occupations. Public policies need to combat traditional value orientations on gender differences, gender based (in)abilities and gender biased relations. They need also to eliminate remaining forms of gender discrimination in the labour force regarding employment selection, wages, occupational positions and alike. Public policies need further to strengthen measures reconciling labour and family life, more particularly in the fields of childcare facilities. Moreover, work time flexibility and variability, adapted to family needs, should be promoted. Furthermore, public policies should promote greater job stability for both men and women. Last but not least, family friendly and child related policies need to be universalistic and benefits granted irrespective of the type of family and household forms.

Lack of clarity on population- and family- related policy aims

In terms of population policy as statement of intent and practice in various countries we observe that differences in the ideological conceptualisation of the roles of families and competing interests of the key socio-economic and political actors have as consequence a lack of consensus on the scope and focus of population and family-related policies. Population policy goals are rarely, if at all, explicit. There is a need for more clarity in policy goals with respect to family building, gender equity and work patterns and their mutual relations. There is in particular a need for clarifying policy goals regarding macro-level phenomena such as population rejuvenation due to below replacement fertility levels and its relationship to gender relations and to the way work patterns can be modelled.

Lack of family-friendly climate

European societies are characterised by the existence of diversity in values and attitudes with respect to family building, which are underpinning both welfare regimes and within-family relations. In the domain of partnership obsolete attitudes concerning gender roles and power relations, gender based abilities and remaining forms of gender discrimination in the labour force regarding employment selection, wages, occupational positions and alike are still strongly present and impair both the conceptualisation and implementation of modern family- and population-oriented policies.

Two findings are relevant to reproductive behaviour. On the one hand, women appear to want more children than they eventually have. On the other hand, even if the majority of women achieved the number of children they wanted, in most countries the generations would not be replaced in the longer term. This is because a substantial proportion of three and four-child families are required to compensate for those who for one reason or another remain childless or have only one child.

Macro-level differentials

At the macro-level policy-relevant findings relate to between-country differences and similarities and are drawn from the general contextual and micro-data analysis and the social policy analysis both in terms of the statement of intent and commitment to implementation.

Regarding between-country differences it was observed that in the eastern European countries significant demographic changes were associated with the economic and political transition. For this group of countries it was shown how demographic phenomena have been affected by the dismantlement of the social protection system of planned economies when adaptations had to be made by a broad population base to the weakening of the welfare system in general and public provisions to families in particular. The most striking demographic consequences have been a sharp fertility decline to very low levels in all transition countries and a remarkable decrease of life expectancy, and increase of mortality among the working age population, particularly men, in some transition countries.

In the Nordic countries, by contrast, there is strong evidence that reinforcement and fine-tuning of the family-friendly policies and measures, more in particular with respect to the position of women, as part of a risk-reducing universalistic welfare model have contributed to stabilizing fertility levels at levels that are only slightly lower than replacement levels.

Much has been said in the policy discourse about the benefits of 'familism' and the existence of stronger family support in southern European countries than in western and northern Europe. As a consequence of this, it is often concluded that the Mediterranean countries are more likely to rely on family support and embrace family-care solutions in their policies for the needy.

Between-country comparison shows that families in southern Europe do in fact more often support and care for their less able and needy members. However, high demands placed on families under conditions of weak public support, are a cause for dissatisfaction and general stress, more particularly among women since much of this care provision comes from a gender-based division of labour both within the family and the labour market. Furthermore, a comprehensive research approach also shows that this support may largely be a result of a 'no-choice-situation' due to the weakness of public support in terms of scope, level of public transfers and targeting. It is in the southern European countries that we find the lowest fertility levels, the highest proportions of people reporting dissatisfaction with their life chances and the highest proportions that consider themselves to be in bad or very bad health. Research in the eastern countries, although less well empirically documented points to a similar conclusion.

Persisting gender inequality in combining family and work

Improvement of the position of women in the labour market and family-friendly policies and measures facilitate childrearing and contribute to enabling women to approach more closely the number of children they wish. A strong gender perspective in family policy-making appears to be indispensable. This perspective needs also to foster policies and measures that may contribute to changing attitudes and behaviour of men with respect to household and child-caring tasks. Experience in the Nordic countries shows that the take-up by men of opportunities made available through public policies to be care-providers is still relatively low. In general, policies should more concentrate on changing attitudes and behaviour of men. Institutional (state) supports, aimed at correcting market mechanisms, continue to be necessary to achieve non-destructive post-breadwinner employment and family arrangements.

Between-country differences in fertility levels associated with differences in policies suggest that measures that effectively address women's emancipation, enhance personal security and autonomy and gender equality are associated with higher fertility levels. The striking differences in the fertility levels and gender policies between the Scandinavian and the Mediterranean countries suggest that measures aimed at fostering gender equality in matters of labour and family life positively influence fertility, even when this is not the primary aim

of the policy. National family policies in the broader sense and fertility policies (family planning and reproductive health policies, measures and services favouring childbearing and rearing) could draw lessons from this example.

Gender equality in the domain of family-work relations might be favoured by a generalised reduction of working time. A promising field of action seems to consist of involving private firms, via various channels or procedures, in the development of work patterns which develop a family friendly labour organisation, enhance gender equality and facilitate workers to have the number of children they want.

The development of an adapted audit instrument on family and professional life, consisting of a diagnostic instrument and a management plan, for the realisation of an emancipated and family friendly labour organisation in public services as well as in private companies is advocated. In the domain of public policies, the adoption of a gender mainstreaming strategy is suggested to be an innovative and active instrument to foster gender equality.

Increasing work stress

We observe heightened stress at work, precariousness of jobs, unemployment, and earlier forced retirement. These phenomena, in combination with the ever-increasing expectations regarding quality of life and consumption make people more reluctant to assume long-term risks and responsibilities of child rearing.

Institutional supports aimed at correcting market mechanisms are considered to remain necessary to improve gender-family-work interactions, especially with respect to the neo-liberal economic developments leading to increasing work pressures and 'flexibilisation' in favour of the employers rather than for the benefit of employees. A typical example is part time working, which may be experienced as an opportunity by a significant proportion of women in countries with a strong mediating role of the state but remains a 'no-choice-condition' frequently associated with unconventional working hours and weak or no work-related insurance-based social security for women in many European countries.

Universal general schemes versus targeted policies

Universalistic regimes appear to provide a broad range of advantages over targeted measures.

Firstly, policy measures that intend to produce population effects have to reach a broad population base. It is not by traditional anti-poverty measures targeted at a small minority of the population that demographic effects can be achieved.

Secondly, it is by creating a climate of protection by guaranteeing social rights before material deprivation occurs that significant numbers of women can be encouraged to take the risks of having and raising more children than they currently do.

Thirdly, universalistic policies contribute to the greater democratisation in society with respect to parenthood. Higher fertility is no longer the result of larger families realised at the two poles of the social ladder, among the poor and less educated women or very prosperous ones – in both cases child-bearing patterns largely stemming from a gender-based division of labour within the family and the labour market. Average, double-income families see their opportunities enhanced, as do lone working mothers.

Finally, while there is still much room for improvement, the currently operating more universal general schemes appear to work. In advanced welfare states the majority of women can realise the desired family size without having to opt out of the labour market. This opportunity enhancement for free choice regarding the timing and number of births is transposed at the societal level into fertility levels that are close to generational replacement and lower levels of dissatisfaction of people with their life chances.

Protection against long-term risks

Social protection systems in most countries lack effective ways of spreading the risks associated with competition in the labour market, the low-income/high needs nexus, and high demands on time in the workplace and family over the entire life-course. The incompatibility between family life and paid work is currently predominantly concentrated in the early stages of family building. Stress is particularly high for young adults during the early stages of family formation, as well as for families with children in general. At present, of the various household types, families with co-residing children are least satisfied with their work or main activity, income, housing condition and leisure. Resources and free-from work time need to be redistributed in a life course perspective in a more family friendly way.

An important measure of well-being is the subjective appreciation of satisfaction with living circumstances. Equally important is the subjective feeling of security that comes from being sufficiently well equipped to help oneself and/or turn to public institutions for support and care in circumstances when individuals lack the capacity to compete in the labour market, when they bear and rear children, suffer from ill health or become elderly.

The awareness of risks is an important component of responsibility sharing between the individual and the state. Many people do not appear to be prepared to tackle the life-course risks which they may have to face, especially in view of the high prevalence of divorce, single parenthood and the increasing probability that large proportions of people, especially elderly women, will spend a considerable number of years living alone.

The current toolbox of family-friendly measures appears to be insufficient to resolve the dilemmas facing individual women and men with respect to genuine gender equity, on the one hand, and on the other hand, dilemmas of modern societies with respect to intergenerational continuity and redistribution of resources between generations.

To reconcile the peak years of family formation with competition in the labour market, the entire life course perspective of employment and retirement might have to be rethought so as to give more free time and resources to young families and to create conditions for active ageing that entails also the option of working at higher ages long after children have gained autonomy.

DEMOGRAPHIC AND CULTURAL SPECIFICITY AND INTEGRATION OF MIGRANTS

Issues addressed and main findings

Basic patterns and trends of Europe's migration field, stocks and flows of migrants, national origin of migrants, types of migrants, economic and demographic context, costs and benefits of migration and policies were addressed.

The foreign population in Europe forms, on average, only 4 percent of the total population. However, proportions of foreigners vary considerably from country to country, although they have been rising generally. The greater part of the foreign born population is resident in Western Europe. During the last decade, the total foreign stock in Western Europe has increased by 35 percent.

In Eastern Europe, flows and stocks remain relatively small. The fall of the Iron Curtain promoted an increase in migration flows within and from countries of Central and Eastern Europe, but numbers are modest, although probably underestimated. In this area there is evidence of regional self-containment.

Trends in naturalisation are significant and numbers are going upward, indicating that the real total stock of citizens of foreign origin in Europe is considerably above the recorded foreign population. The high, though lowering fertility of non-European immigrants also contributes to the increase of the proportion of second-generation migrants.

The majority of immigrants are from European origin, but there might be an increasing inflow from outside Europe, also via undocumented immigration. There is a considerable diversity of foreign migrant origins and a complex set of geographical locations and histories. Recent trends reinforce this diversity.

Due to the combination of a variety of reasons – *inter alia* difference in appearance and/or cultural features of particular migrant populations, increasing volumes of illegal migrants, asylum seekers and refugees, incomplete integration in employment and higher level education, rejection and discrimination by the native population, cultural self-containment and migrant ethnocentrist reactions or re-ethnisation, in-group family formation and traditional gender relations, high fertility, residential concentration - some migrant subgroups are becoming more visible.

There are several changes in the type of migration towards Europe: shifts from documented labour migration towards family reunification and family formation; growth in numbers of refugees and asylum seekers; shifts from legal towards illegal migration; shifts from unqualified towards qualified migrants.

Migration appears to some to be increasingly a business in which numerous actors are involved. It includes institutionalised networks, states, organisations, agents and individuals, each of which stands to get some benefit from international movement. Part of this business is illegal immigration as a result of organized criminal trafficking and smuggling in human beings.

Economic demands for immigration in Western Europe concern very specific and qualified occupational sectors (IT, health services, some forms of engineering). In contrast, existing immigrants feature prominently in the unemployment figures or have, more particularly in the case of women, a lower labour participation. There are clearly differences in interests and benefits of labour migration for private firms who can take up short term engagements and social needs for long-term strategies of social and cultural integration of immigration and adaptations of a society as a whole.

It appears that the demographic effect of migration is, for receiving as well as for sending countries, only of marginal importance. Hence, the migration debate should concentrate on the societal and policy implications of migration and not on the demographic impact. It was also stressed that recent immigrant populations and historical ethnic minorities, albeit they show many sociological similarities, should, in research as well as in policies, be dealt with separately.

Integration studies on migrants need to build on greater clarity about concepts, definitions and theories, forms of integration, target groups of integration studies, measurement of integration, context of integration, outcomes of integration and policies.

Integration of immigrants relates to the inclusion of new populations into existing social structures and the quality and manner in which these populations are connected to the existing system of socio-economic, legal and cultural relations. Four forms of integration were considered: structural integration, social integration, cultural integration, and identificational integration. In this context it appears that the concept of foreigners has become too narrow and both research and policies should at least look at those foreign born and possibly also at the populations with an immigrant background. Inquiring about the self-perceived cultural or ethnic identity might be another information useful for the sociological study and policy

implications of the presence of people of alien origin and their degree of assimilation, integration or insertion in the national population and their multiple identity.

Theories of integration can be classified into four groups: (1) the stages model, aiming at the relative duration of the integration process; (2) theories starting from the characteristics of the receiving society, and (3) theories starting from the immigrants' characteristics and (4) the integrating rational choice approach. Different patterns of ethnic incorporation may evolve, e.g. integration, ethnic minority formation, racial exclusion, dual labour market, ethnic enclave economy, ethnic stratification models.

NIEPS confirmed that migration issues especially as they relate to the needs for integration remain heavily loaded with ideological approaches both with respect to conceptualisation, choice of issues to be researched, methods of approach and interpretation of findings.

NIEPS pointed out that both scientists and policy makers should avoid to get carried away by some of the conceptually vague political/ideological discourses related to the assigned place of immigrants in the social structures – e.g. “multiculturalism”, “melting pot”, “mosaicism” – which does incorrectly or insufficiently represent reality.

With respect to integration of migrants, the following issues can be highlighted. First it appears that various indicators of demographic behaviour of migrants (nuptiality, fertility, morbidity and mortality, gender differences in morbidity and mortality) can be used as indicators of the degree of integration. With respect to benefits of demographic adaptations in terms of gender equality and improvement of health conditions there are also indications that, in some cases, in addition to benefits for immigrants themselves, they may be contributing to the speeding up of the demographic modernisation in their country of origin through interaction with their family and friends. With respect to social integration it appears also that second generation migrants are sometimes socially worse off than their parent generation, notably are at higher risk of unemployment. This is a salient indicator of a failed integration policy.

Research policy implications

Several circumstances ranging from the continuous influx of migrants from more distant regions and cultures, increasing migration push from developing countries, enlargement of the EU, incomplete integration of existing migrant populations, increasing xenophobic reactions within national populations, to the prospect that European countries might want to invite important numbers of qualified immigrants, lead to the necessity to intensify different types of policy oriented research on migration and integration of migrants.

There is a need for new and better basic statistical data, including the type of migration, sex-age structure of migrants, their generational identity, their ethnicity (ethnic identity) and language, their family status and composition, education, employment, level of income and housing. International cooperation in this domain, also between sending and receiving countries, is a necessity. The further development of the European Migration Information System (EMIN), including central and eastern European regions, would be a valuable tool.

Data collection requires the development of a coherent set of migrants' integration indicators (including demographic indicators). Indicators should also include variables allowing the identification of second and third migrant generations. Several approaches may be envisaged in this domain going from the identification of the population with an immigrant background to the recording of the ethnic identity.

Integration research traditionally concentrated on the migrants' descendants ('second generation migrants') and compared them with the parental group. This approach is too narrow and integration studies need to address also the native population as a reference group.

Studies that want to focus on discrimination issues should as a rule have one or more immigrant groups as reference groups as well as the native population.

In addition to population registration data via national or local population registers and censuses, there is a need for more in-depth research by means of a variety of specific surveys, preferably organised on an internationally comparative basis.

It is necessary to study migration and integration processes in a multi- and interdisciplinary perspective, involving scholars from different human and social sciences.

The costs and benefits of migration should be researched in a comprehensive way and in a longer-term view, taking into account not just the short-term demand for labour and its immediate benefits, but also the total benefits and costs of the integration process, including the costs of meeting the education, health and housing needs of immigrants and their descendants, the net effects on public order and long terms social protection system.

NIEPS identified needs for research on a variety of subjects and the necessity to include in the survey research the different components of integration and inclusion: structural, cultural, social and identificational. Regarding issues, the following priority research areas are identified:

Scenario research on the possible consequences, benefits as well as costs, in different fields – e.g. employment, social security, demography, inter-group conflicts – of different migration policies;

Prognostic research on the potential migration flows emanating from a further extension of the EU;

The volume and kind of undocumented migration;

Research on the demographic behaviour of migrants and their integration in this respect in the receiving country;

Research on the social inclusion and work-related integration of second and third generation migrants;

Multidisciplinary research related to the ageing of European population, in which migration might be considered as part of a broader and multidimensional policy response;

Regarding conceptualisation of replacement migration it is necessary to undertake multidisciplinary research in which all of the demographic, economic, social, cultural and psychological aspects of inter-group relations are included;

Research of implications of the emigration of skilled specialists from developing and transition European countries for the sending countries;

In the event of policy developments that might favour immigration, research of the needs side would include assessments of numbers and qualification of migrants.

There is the obvious need for further improving migration data and forecasts. However, the latter should not be limited to simple demographic scenarios, but be broadened to multidisciplinary scenario studies.

It was repeatedly stressed that the effects of migration policies should not only be assessed from a short-term, but also from a long-term perspective. It was also concluded that the assessment of migrants' degree of integration should take into account the selective processes that operated in migration as well as in return migration.

NIEPS endorsed the proposals of the Technical Meeting to undertake an internationally comparative, multidisciplinary study on the integration of migrants, mainly based upon the organisation of an internationally comparable sample survey in Western as well as in Eastern Europe and whereby immigrant populations originating from same country and now living in different political and cultural settings would be investigated. In the relation between immigrant populations and the national population two opposite forces appear to be at work: the drive towards identity preservation versus the pressure towards acculturation. The degree to which migrants have moved between those two poles along a continuum should be

investigated and differentially evaluated for the various domains (structural, cultural, social, identificational).

Social policy implications

Lack of consensus on migration questions

A major difficulty for the development of migration policies lies in the existence of profound differences in views regarding benefits and costs of immigration. There is no consistent view about ways to manage migration flows and facilitate social and cultural integration of immigrants. Divergent views are often drawn from fragmented empirical evidence but also on often non-explicitly expressed ethical or ideological convictions. Whatever option with respect to migration countries may chose, the development of a coherent and comprehensive implementation strategy is necessary. In view of the free movement of people within the European Union some aspects of migration policies and integration measures should evidently be designed and coordinated at the European level.

Need for adequate integration policies

Migration flows need to be accompanied by integration policies related to the different aspects, namely structural, social, cultural and identificational integration. Candidate immigrants need to be provided with information on their rights and obligations in the host country. Immigration needs to be accompanied by active integration measures, comprising language courses, skill enhancement, information on job opportunities, access to public services and social networking.

Integration of migrants is a process involving both immigrants and natives. Attitudes related to racism, xenophobia, and ethnocentrism, both among the immigrants and the domestics need to be combated.

Literature review shows that demographers have a difficulty in transcending statistical figures and looking at the sociological and political implications of their investigations. Nevertheless, NIEPS systematically discussed matters of policy relevance. The following points should be highlighted.

Replacement migration is not a solution for population ageing

The UN-Population Division report on replacement migration has been severely criticised in quarters of European experts as being too narrowly conceived, but it must be admitted that it has also largely been misunderstood and incorrectly quoted in the media and by various interest groups and lobbyists. There appears to exist a virtually general expert view that replacement migration is not an appropriate strategy to compensate for population ageing in a long perspective, since migrants also age. Ageing requires a basket of measures of which migration might be one of the minor components. Possible shortages on the labour market should first be addressed by valuing, mobilising and integrating the existing reserves of manpower of foreign origin, confronted with higher than national average rates of unemployment, instead of enabling enterprises to recruit labour at no cost for themselves but shifting the cost to the society at times of economic restructuring of firms.

Brain drain remains an important issue for sending countries, especially now that European countries seem to turn to more selective immigration policies.

In their resumed nation-building process several Eastern European countries have to develop subtle policies to integrate their immigrant population components resulting from post WWII foreign occupation. The forthcoming EU enlargement will transform some of the current international migration towards the EU into internal EU migration and will require the further improvement of the enlarged EU immigration control machinery.

The assimilationistic-multiculturalistic controversy

There are indications that assimilation policies may be more conducive to successful integration than so-called multicultural approaches that encourage immigrants to maintain their original in-group characteristics and do not equip them to acquire skills for optimal integration in their new society. The maintenance of traditional gender inequality among some immigrant groups is discriminatory for immigrant women and the immigrant group as a whole. Equality and equity principles that immigrant men rightly claim for themselves, should not only be seen in the context of between-group relations (migrants and nationals) but also within immigrant groups (men and women).

The demographic characteristics (marriage, consanguinity, birth-rate, adolescent and late fertility, short spacing of births etc.) of some recent immigrant populations are sometimes rather backward. Integration policies should include adequate measures for promoting reproductive health, gender equity and a faster demographic transition. Traditional gender inequality and inequity customs of some immigrant groups (e.g. discrimination of girls,

genital mutilation, forced marriages, polygamy) should, in the interest of immigrant women and the immigrant group as a whole, be discouraged.

Selective educational measures may be necessary to enable gifted immigrant second-generation youth to enter high-level schools and institutes. Mixed marriages between immigrants and the host population, which are likely to enhance integration, may be indirectly encouraged through a policy of housing integration aiming at more mixture among different population and the eradication of the *de facto* self-contained urban areas which are now the dominant form of residence of many immigrant populations.

Naturalisation and integration efforts focussed on the immigrant populations should be complemented by anti-discrimination policies addressed to the national population and by anti-racist and anti-ethnocentric policies addressed to both nationals and immigrants.

AGEING, INTERGENERATIONAL SOLIDARITY AND AGE-SPECIFIC VULNERABILITIES

Issues addressed and main findings

Population ageing is a universal phenomenon in Europe, but large differences still exist in its extent, pace and relative impact of its various determinants. Its speed and intensity are subjects of concern, particularly in countries with a strong dejuvenation process due to extremely low fertility levels. Although a more balanced view on population and individual ageing is developing (going from negative, alarmist and depreciative attitudes towards more positive attitudes, values and norms), ageism and age discrimination are far from being eliminated.

Gender differences in mortality result in significantly larger ageing prospects for women than for men; these differences are even more pronounced according to marital status or living arrangements, single, widowed or divorced men showing a less favourable profile in longevity. There is a salient, and in some respects even an increasing diversity in biological, demographic, social and economic characteristics within the older adult population: these concern not only differences between women and men, but also between young-old and old-old, between singles and people living in couples, between poor and rich. The compression of morbidity at very high ages enhances the variance in the aged population, improving the health of the younger old and worsening that of the very old.

A remarkable fact is that the trend towards earlier retirement evolves in the opposite direction of the improving health and educational situation of older people. *De facto* ages at retirement are far below the official ages. Life expectancy has been increasing throughout the 20th century and the causes of death have largely shifted from infectious disease to senescent deterioration. As a consequence younger elderly people aged between 65 and 75 years reach today the third age in relatively good health and the bulk of elderly live under conditions of income security. The health and socio-economic profile of the oldest old is less favourable as a consequence of the individual ageing process and disparities in life chances of the oldest generations.

Statutory age at retirement has, meanwhile, remained unchanged in most European countries while *de facto* age at retirement has even been declining for men throughout the 1970s, 1980s and 1990s. Effective age at retirement has been increasing for women although it is still considerably below statutory retirement age and economic inactivity is still very high among elderly women in many European countries.

The situation in many Eastern European countries is of particular concern due to the negative side-effects of the transition, where the aged were hit very badly by the socio-economic changes: increased unemployment and forced earlier retirement, decreasing public support for

vital services and goods, loss of savings due to inflation, low pensions, etc., all resulting in higher dependency ratios and higher burden placed on families.

As far as concerns the determinants of population ageing, it is clear that both low fertility (and more particularly below replacement fertility) and increasing life expectancy at higher ages are contributing to the population ageing process. However, significant between-country differences in the combination of fertility levels and longevity exist. Structural ageing (ageing due to longer duration of life), resulting from societal goals aimed for, is to be accepted and will have to be subject of adapted policies, whereas contingent ageing (ageing due to lower-than-replacement fertility) is a phenomenon which, ultimately, will have to be subject of policies aimed at change.

With respect to the vulnerability, risks and resources of elderly it was stressed that not only vulnerabilities and risks of high age, but also positive strengths and resources of the elderly should be considered in research and policy. There are two types of challenges that may be faced in later life: relatively sudden and unexpected changes such as retirement, divorce, accidents, death of partner or kin, and relatively gradual changes such as smooth deterioration of health, level of income, quality of housing, social roles. Frailty risks are especially salient where several individual risk factors, such as very high age, bad physical or mental health, low capacity for autonomy, living alone or poor social ties, and low income cumulate. The effect of divorce on support for older people and on intergenerational relations in general may become an important issue, since children from divorced parents have weaker links with their parents and especially with their fathers.

One of the major policy relevant issues relates to ageing as it impacts pension systems. It is generally agreed that the traditional pension systems in Europe should be reformed and adapted to the new demographic regime. They should be neutral, fair, and robust with respect to the further expected increase of longevity. Pension reforms should, however, be part of an integrated policy together with population policies and welfare and labour market reforms. No single measure, after all, is believed to be able to resolve in a miraculous way the societal problems resulting from population ageing.

Within this framework, the age at retirement again was discussed at length. In most EU member states there has been a marked decline in labour force participation rates among older men in recent decades. However, first signs of a slow-down, stabilisation or even a reversal can be observed, more particularly among those in their fifties. The picture for women differs from that of men in two respects: in most countries labour participation rates of older women still lie substantially below those for men, but those rates are increasing instead of decreasing, as a result of the increasing propensity of successive age cohorts of women to work, at least among the younger old.

Several possible causes have been suggested for the early exit trend: the establishment of public pre-retirement schemes to facilitate the exit of older workers; the attitudes of employers regarding the lower performance and higher costs of older workers; ill health as one of the most important reasons for early retirement; the attractiveness of life in retirement; the negative attributes of jobs in later life.

New public policies are emerging aimed at extending working life at older ages. Also here several drivers for this policy change have been suggested: the smaller birth cohorts of the coming baby-bust generations may need older workers to compensate the demographically induced labour force decrease; pension costs are high and are expected to further increase; early retirement schemes have had weak effects on the provision of jobs for younger workers; there is a general shift from passive to active employment policy; it is recognised that employment problems should be tackled directly rather than offloaded on to the state. However, there has so far only been limited progress on the development of policies on active ageing.

The labour force participation of older people was discussed within the larger framework of active ageing. Special attention was paid to the health dimension at higher age. It was argued that healthy ageing has to be considered in a life course perspective. The life course approach to ageing first of all recognises that older people are not a homogeneous group and that individual diversity tends to increase rather than decrease with age. Secondly, it acknowledges that interventions creating support environments and fostering healthy choices are important at all stages of the life course and lead to better health in later life. It was, however, also pointed out that in addition to life-course-linked behavioural processes, biological features and cultural, socio-economic and environmental living conditions and historical processes play also a considerable role in the emergence and development of disease patterns among older people. Hence, healthy ageing involves both individual and societal responsibilities.

Much attention was paid to the recent trends in the relation between life expectancy (LE) and disability-free life expectancy (DFLE). The results of the research in this domain are still somewhat contradictory. In general, however, whereas the increase in LE at age 65 appears to be universal and regular in the low mortality countries, DFLE – all disability levels combined – appears to have stagnated. More subtle results are obtained when the data are differentiated according to the time period, the degree of disability, the type of behaviour, the educational level or occupational activity: in recent years the increase in life expectancy seems to be accompanied by a pandemic of light and moderate, but not of severe disabilities; people with lower risk behaviours (no smoking, appropriate diet, physical exercise) experience less years of disability before death; higher educational levels and history of tertiary sector occupations are associated to larger increases in disability-free life expectancy. It is expected that such features are conducive to a further compression of disability.

Research policy implications

Thematically, the following suggestions are made: investigation of the future trends in the compression of morbidity among the aged and their consequences for the reorganisation of health and welfare care; study of active and dynamic ageing, in which thresholds are not based on age, but on health, occupational risks, attitudes towards work and other lifestyle activities; investigation of the social differentiation of vulnerabilities, risks, resources and reserves of the elderly; comparing demands with respect to vulnerabilities and risks to available and needs supplies of care of dependent elderly; surveying the very old and the institutionalised elderly; investigation of new arising dilemma's and controversies such as the public desires and policies to increase age at retirement and the private (individuals as well as firms) strivings to get or put people on pre-retirement schemes and the public policies to promote informal care versus the move away from family-provided assistance under the impulse of individualism; research on policy making in the domains of population and individual ageing.

Suggestions of methodological nature are formulated as follows: the traditional gerontological research efforts should be broadened to more balanced, multidisciplinary research approaches, including demographic, socio-economic and socio-psychological domains; there is a need for more micro-level analysis, more particularly in life course, cohort and longitudinal perspectives, of the vulnerabilities and risks on the one hand and resources and reserves on the other hand, in different domains of life of the aged; subjective (attitudes, expectations, satisfaction) as well as objective indicators of quality of life in the fields of health, work, income, housing, social life should be measured.

After reviewing the available data and their quality, NIEPS stresses the need for the development of comparable indicators and co-ordinated data collection. Allocation of appropriate resources is a necessary prerequisite for both scientific and policy development breakthrough. There is a clear need for an all-European synergy in view of developing comparative research projects based on micro level data collection and other research instruments. Lack of adequate data sources to address the living conditions of the aged are particularly felt in transition countries where many of the ongoing societal transformations as they affect individuals and families are not properly documented. Thus the development of informed policies based on the analyses of needs and preferences is lagging behind.

It was agreed that the NIEPS network works towards developing a co-ordinated survey with a European added value targeted on a comparative European micro-level survey on the living conditions of elderly.

Research on pension reforms should be integrated with population policies and welfare and labour market research in multidisciplinary research projects in view to identify both possible future scenarios and the assessments of effects of implemented policies in the domain of labour market, social protection and population policy.

The deficient labour force participation of older workers and problems of active ageing in general is another group of topics that require intensified research efforts. Barriers facing older workers are the result of highly complex interactions between a number of economic, psychological, social and organisational factors: research should disentangle these relationships. The limited success of reforms in these domains demands a continuous assessment of these policies for their results and cost-effectiveness.

The importance given to the life course approach to healthy and active ageing justifies the development of extensive research efforts in this domain, also of a longitudinal nature. However, also the respective effects of individual behaviour and social living conditions on healthy and active ageing should further be investigated.

The complex association and contradictory research results concerning the relationship between life expectancy and disability-free life expectancy require the continuation and even extension of the within- as well as between country comparative research on these issues. This type of research should, moreover, be extended to other countries that have not yet such research tradition.

NIEPS endorsed also the proposals of the NIEPS Technical Meeting on ageing, intergenerational solidarity and age-specific vulnerabilities to undertake, in co-operation with specialised socio-gerontological institutes, an internationally comparative sample survey on older people, embedded in a policy sensitive contextual analysis, and complementary to the proposed survey on gender, family building and work patterns.

Social policy implications

The mainstream research-based policy response to population ageing suggests institutional adaptations involving working longer and increasing employment rates. A repeatedly up surging topic in this respect is the need to increase, via appropriate stimulating measures, the formal and *de facto* age at retirement, albeit taking into account intra- and inter-individual variability with respect to desires, needs and abilities. Indeed, a general increase of the age at retirement might strongly increase expenses for medical leave. Therefore, flexible age boundaries for retirement and financial incentives to remain economically active are considered to be appropriate measures. In this domain we will also have to deal with the controversy appearing from the demographic need to increase activity rates at higher ages and the individual desires to retire at earlier ages as well as the tendency of private companies, boosted by international competition and profit enhancement, to pension off middle-aged employees.

Obviously the various components of the social security system (and not only the pension system) will have to be adapted, more particularly in a long-term perspective, but fine-tuning adaptations in multiple domains might suffice to preserve the European social security model. The PAYG system can be improved by relatively small adaptations like modification of the minimum age at retirement, activation of part of the inactive working age population, adaptations of contribution rates, a multi-pillar approach to social protection. It might also be important to consider and fit-in the required adaptations for the aged in a general revision of the organisation of the entire life course. Hereby, we should not only take into account the newly arising needs at higher ages, but also the burdens related to the reconciliation of work and family development at young active ages (cf. conclusions of the Workshops on gender, family building and work patterns).

Other policy suggestions are: give increasing importance to preparation to ageing, and to prevention and rehabilitation; increase the independence and autonomy of the elderly; adjust the increasing gaps between demand and supply in young-needed services (e.g. surplus of teachers) and old-needed services (e.g. shortage of formal and informal care services for the aged).

Active ageing

A new conceptual approach to population ageing and its related policies, adapted to the new demographic regime, is necessary. The aged should no longer be defined on the basis of a static chronological age, but on the basis of a dynamic ageing concept, taking into account the total age composition of the population, its social and biological functionality, validity and diversity.

Again it was stressed that substantial reforms are necessary in the field of the age at retirement. Given the complex nature of the problem and the different and opposite interests that are involved, it is recommended that a holistic policy be pursued in which employment, retirement, health and welfare policies are integrated, promoting at the same time increasing

employment opportunities for older people, reducing too easy exit pathways, and protecting the most disadvantaged and vulnerable workers. Policies should be developed by means of soft reforms, i.e. measures that may stimulate older workers to retire later, but leave the social protection element largely untouched. Examples of such types of reform are the inclusion of long transition periods in the pension reform plans and stimulate older workers' participation by giving them fewer obligations and more privileges, such as additional leave, increased holiday entitlement, a workload reduction, age limits for irregular work, exemption from working overtime, part-time retirement regulations.

The life course approach to healthy ageing requires a vast array of policy measures involving not only public health, labour and environmental policies, but also policies aimed at reorienting educational programmes and influencing public opinion and behaviour.

Adapting the social security system

The traditional pension systems in Europe should be reformed and adapted to the new demographic regime. They should be neutral, fair, and robust with respect to the further expected increase of longevity. Pension reforms should be part of an integrated policy together with population policies and welfare and labour market reforms.

Each specific adaptive measure to population ageing on itself – pension system reforms, changing labour participation, activating older people, increasing immigration, redressing fertility – will help but will not resolve the problem. An integrated, multi-sectorial policy, involving all of those measures, will be needed to address adequately the long-term challenge of population ageing.

Compression of morbidity

Last but not least, all policy efforts aimed at or resulting in a further extension of life expectancy should focus on having that extension free of severe disabilities and should strive at a further compression of morbidity in the life course.

AN INTEGRATED APPROACH TO FAMILY DYNAMICS, INTEGRATION OF MIGRANTS AND POPULATION AGEING

This section aims at looking at the relations between the three themes of the NIEPS project. Starting from the observation that much of the research and policy making on the three major NIEPS themes occurs in a secluded way, the need for a more integrated approach is argued.

The institutional fragmentation and need for integration of research domains

The population research community in Europe is, due to the European multinational and multilingual composition and the national organisation of academic research and education, in large majority split up.

The 11 national population institutes members of NIEPS have been at the forefront of European population research over past several decades. However, much of that research has been implemented at the national or regional level as national funding agencies have not shown interest in funding comparative transnational research. Each institution had to obtain resources at the national level and the transnational component, when pursued, relied mainly on the initiative and enthusiasm of individual researchers. Lack of comparable data has been a permanent stumbling point in comprehensive comparative research. The resources for transnational projects that include data collection in the case of the World Fertility Survey and Fertility and Family Surveys (FFS) came from UN co-funding and in the case of the most recent project Population Policy Acceptance Study (PPAS) co-funding comes from the European Union. An international umbrella organisation appears to be indispensable both at the organisational and financial level for comprehensive transnational cooperation in the European research area.

On the one hand, as consequence of the organisational specificities in Europe in the domain of population research and the scientific requirements and pressures on individual researchers national research units have to concentrate on one single or a very limited number of subjects. Interrelating or integrating different population phenomena remains thus out of reach. On the other hand, some national or academic population research institutes be it due to their specific mission with respect to governments or due to quick changing nature of market-driven research, address a very broad range of population issues – partnership, fertility, migration, mortality – but in rather general or fragmented manner.

Looking at the research programmes or publication output of the 11 population institutes, one can observe that often a thematically quite broad and diverse research programme exists, but that the different population research topics are studied in secluded projects, and sometimes even separate research department or sections.

The relations between family dynamics, integration of migrants, and population ageing

The three themes studied in NIEPS – gender relations, family building and work patterns / demographic and cultural specificity and integration of migrants / Ageing, intergenerational solidarity and age-specific vulnerabilities – are complex phenomena on themselves, both for research and policy aims.

They are, however, also, in several respects, mutually interrelated:

Family dynamics

Integration of migrants

Population ageing

Family dynamics – integration of migrants

As has been shown the interrelations between gender relations, family building and work patterns are not only complex phenomena, both for research and policy making, for the autochthonous populations in modern societies, but they are even more critical issues for immigrants, more particularly originating from ethnically more distant and religiously more different populations. Such populations usually originate from cultures with more patriarchal values and norms with respect to gender relations, family building and work division. In modern culture, those populations have to adopt values and norms in gender relations with respect to individual emancipation and rights, in particular for the females, which must appear, more in particular for the earlier prerogatives of the male beneficiaries, as ideologically blasphemous and socially degrading. They have to adapt their reproductive behaviour in such a way that their children and grandchildren get the same opportunities and quality of life as the nationals in their host country. They have to acquire skills that allow them and their descendents to function adequately in their host society and to compete successfully on the labour market.

Integration of migrants – population ageing

It appeared that some researchers and policy makers suggest that the population ageing and future population decline should be compensated by immigration. They think that immigration is a kind of easy and handy shortcut to offset the difficult and seemingly unavoidable societal problems resulting from population greying and population dejuvenation. Others have, on the contrary, argued that immigration is not an appropriate or desirable means to deal with population ageing and decline. This controversy was addressed by NIEPS. The conclusion was unequivocal: replacement migration is not a fundamental and long-term solution to population ageing. It can only be a temporary means to slow down or compensate for population decline.

Indeed, all population scenario exercises – also the controversial recent UN report on replacement migration - show that immigration is not a solution to demographic ageing, because the average age of immigrants is only a little lower than that of natives and the initially higher fertility of immigrants soon decreases to lower levels. Immigrants themselves age and both natives and immigrants need ever more immigrants to compensate for the population ageing and to replace them. Only huge numbers of migrants would succeed in slowing down or neutralize the ageing process, but would result in a phenomenal increase in population size.

Population studies reviewed under NIEPS also show that additional large volumes of immigrants are likely to face serious social and political objections. The existing literature, indeed, shows that the acceptance of large numbers of immigrants coming from culturally

distant populations, requires substantial efforts of social, cultural and identificational integration or leads to social and political strife.

Thus immigration is not a tool for fixing population ageing but it is a complex social process.

The ageing of immigrants themselves requires appropriate measures to safeguard their rights to pensions, health and welfare care. Specific problems exist here, since some migrants may have spent part of their active life in their country of origin or another country than the one in which they may reach the age of retirement.

Population ageing – family dynamics

Population ageing is not the only demographic change modern societies are experiencing. It occurs concomitantly with changes in relational and reproductive behaviour, family structures, women's participation in paid labour, and increase in the number of simultaneously living generations. And all this occurs parallel and in interaction with fast cultural, socio-economic and technological changes.

These simultaneous changes in population age structure and family dynamics are at the core of the problems NIEPS wanted to address with respect to the questions on intergenerational solidarity and age-specific vulnerabilities of the elderly.

The larger number of longer living elderly goes hand in hand with smaller and more frequently disrupted or reconstituted families, living at greater distances, with less family members available for care and social contacts. Not only family and social structures and relations are changing, but also attitudes, aspirations and expectations, more particularly with respect to providing and receiving assistance, help and care. New equilibrium has to be found to reconcile individual and social needs and responsibilities more particularly with respect to intergenerational solidarity, aid and care.

The need for an integrated approach

The simultaneous scientific and policy consideration of the changing family dynamics, the integration of migrants and the population ageing compellingly points to the need for an integrated approach both in the domains of research and policies.

The NIEPS project convincingly showed the necessity to consider research and policy making in the domains of gender relations, family dynamics and work patterns simultaneously and in their mutual interrelations. Gender relations, task divisions and co-operation in the domains of family building, household roles and out-of-the-house labour probably form one of the most important factors in reconciling family life and work and in the future redressing fertility close to the intergenerational replacement level. More in particular fundamental changes in the timing of events during the life course might become necessary to resolve the dilemmas and controversies related to gender relations, childbearing and gainful employment and retirement.

The question of the integration of migrants coming from culturally more distant countries not only raises the same problems, but even reinforces challenges of the basic gender equality, and more particularly the position and role of women and girls.

The important ageing wave which the industrialised countries can expect in the second quarter of this century will require a revision and adaptation of past research strategies and social policies. For this complex problem there seems to be no simple or quick policy solution. Adapting to the new and evolving demographic regime is a gradual process which started already many decades ago and which, also in the future, will require further adapted policy responses. There is certainly no way back to pre-industrial living circumstances where

the (extended) family network took care of the aged. Also the opposite extreme solution – public provisions in publicly run institutions – appears to be illusory because of its costs and other unfavourable or undesirable side-effects, such as decreasing quality of life, loss of privacy and dignity. On the contrary, a well-designed mix of welfare measures, combining public provisions with community-, family- and self-help might be the obvious path to take. This mix concerns also, although in different proportions, the combination of publicly funded private-market agencies providing institutional care and citizen's associations. Some societies with a stronger family oriented cultural background might appear to be currently in a more favourable situation than others. However, everywhere modernisation is increasingly involving women - the traditional caretakers of the old and diseased – in family transcending social activities which will make them less available for traditional family caring tasks.

The balanced approach that takes into account societal, family and individual needs does not counter-pose family versus public responsibility but promotes varying degrees of choice for individuals to use both. This of course implies the existence of well-developed chains of publicly funded or co-funded services that are made available to individuals and families.

A largely unexplored path of reasoning and policy design with respect to the care of the aged is to reconsider this problem in a total life course perspective and taking into account intergenerational equity. A prudential life course approach of welfare care by which scarce resources would be differentially allocated and rationed over the life span, taking into account the protective effect they have on opportunities over the entire life span, should obviously take into account the complete social security system, – including health insurance, child allowances, unemployment benefits, and retirement pensions. A life course perspective might also give individuals a much greater involvement and say in the way they want to spend both their own resources and public resources in the different stages of their lives.

Such an approach may involve some form of rationing in particular phases of the life course, more particularly at very high ages with respect to costly medical interventions which do not entail improving the quality of life of older people but enable them medically extend life beyond the 'natural' lifespan.

Strategies for an integrated approach

In the domain of scientific research several strategies can be applied with a view to promote an integrated approach in the fields of family dynamics, integration of migrants and population ageing.

In the first place, the conceptualisation of research needs to consider simultaneously the major issues dealt with in the NIEPS project and to look at their interrelations and interdependencies in an interdisciplinary perspective. Such an approach has important organisational implications. The necessity to stimulate and organise multi- and interdisciplinary research is an Achilles tendon of current-day researchers, wanting and pressed to be highly specialised in their own, narrow field, with its own hypotheses, theories, methodologies, results and often also its values and prejudices. But, complex societal phenomena and problems such as discussed in the NIEPS project, require precisely discipline-transcending operative research.

Research centres should organise inter-centre co-operation and pool together and co-ordinate their research efforts and potentials, within and between institutions, within and between countries, - undoubtedly a difficult assignment in research quarters where competitive and co-operative drives are not always well balanced.

An important mission is granted here for national (and European) policy makers. All too often the interest of policy makers is too narrowly focused on national policy relevant research issues, forgetting that most problems transcend the national borders and that, moreover, international comparative research is a crucial instrument to illuminate and resolve alleged national problems.

Up to date there has been a striking lack of allocation of resources by the national research councils or other funding agencies to transnational research projects in view to learn from good and bad practices of others. The few rather old research initiatives such as the World Fertility Survey or Fertility and Family Surveys in Europe and North America have been co-funded by the United Nations. The European Union remains today the sole umbrella organisation that can foster transnational comparative research.

The need for integrated and multidisciplinary research does not necessarily mean that all good should be expected from giant research projects with all-embracing surveys. A solution might be the organisation of simultaneously organised or closely linked and conceptually unified smaller projects such as the surveys with conceptually and methodologically integrated research contents and instruments proposed by the NIEPS.

An often advanced critique of current-day politics in the field of family and population matters is its lack of an integrated approach. Policies regarding gender, family, labour, migrants, elderly are often the responsibility of different ministers and administrative departments, the conceptual integration and co-ordinated implementation of which is weak, if not completely absent.

It must also be admitted that our pluralistic societies house ideologically quite different views on family and population matters. Not so long ago, some key policy actors wanted our populations further to increase, opposed measures in favour of the spreading of modern contraceptives, and claimed to be pre-eminently the defenders of the family. Some are today holding the view that below-replacement fertility will lower the pressure on our environment, that immigration will contribute to the creation of a multicultural society and delete the family notion from their political jargon; still others keep total silence on population matters, not wanting to be suspected of sympathy of ancient pernicious population policies or to intervene in matters which they consider to be private matters of individual citizens – and choose thus to ignore the societal implications of the sum of individual behaviours. A coherent and generally supported integrated view on a present-day population-related policy is virtually absent in all European countries. Yet needs for public support ‘in private matters’ are extensively documented in population research and clearly articulated by the population. Also benefits for the society as a whole of universalistic coverage of social protection that fosters a climate of security of individuals and families in face of multiple risks are well documented.

A prerequisite for the development of a more integrated population-related policy might reside in the development of a more integrated and comprehensive family and population research. Since policies are more and more knowledge-based, vanguard research ideas and results might be an inspiring conceptual source for policy making. At least, some current misconceptions might be cleared up.

Obviously, the major change in approach will have to come from policy-making quarters themselves. Here again, conceptually vanguard policy directives of European political bodies – European Commission, European Parliament, Council of Europe – and policy relevant population-related documents of other intergovernmental bodies such as OECD and the United Nations might have a stimulating effect. Examples of good practice are the communications from the European Commission to the Council and the European Parliament on immigration (Commission of the European Communities (2000; 2001) and on active ageing (Commission of the European Communities, 2002), the OECD studies on population ageing (e.g. OECD, 1996; 2000), the UN charters and the ECE/UN recommendations on population and development (e.g. United Nations, 1994; United Nation Economic Commission for Europe, 1994), the WHO strategy on active ageing (WHO, 2002).

5. DISSEMINATION AND EXPLOITATION OF RESULTS

Deliverables

All of the deliverables foreseen in the project have been produced.

The deliverables are:

1. NIEPS and KDGD (2000), *Workshop 1: Gender Relations, Family Building and Patterns of Work. 15-15 September 2000, Zahradky Castle, Czech Republic*. Brussels: Centrum voor Bevolkings- en Gezinsstudie, pp.242.
2. Katus, K. (2000), *Executive Report 1st Workshop on Gender Relations, Family Building and Patterns of Work, Zahradky Castle, Czech Republic, 15-15 September 2000*. Brussels: Centrum voor Bevolkings- en Gezinsstudie, pp. 55.
3. Spéder, Z. (2000), *Report on the Technical Meeting on Gender Relations, Family Building and Patterns of Work, Budapest 6-9 December 2000*. Brussels: Centrum voor Bevolkings- en Gezinsstudie, pp. 8.
4. NIEPS and CBGS (2001), *Workshop 4: Gender Relations, Family Building and Patterns of Work, Oudenaarde 30 November-1 December 2001*. Brussels: Centrum voor Bevolkings- en Gezinsstudie, pp. 166.
5. Zvidrins, P. (2001), *Executive Report 2nd Workshop on Gender Relations, Family Building and Patterns of Work, Oudenaarde 30 November-1 December 2001*. Brussels: Centrum voor Bevolkings- en Gezinsstudie, pp. 31.
6. NIEPS and BiB (2000) *Workshop 2: Demographic and Cultural Specificity and Integration of Migrants, Bingen,10-11 November 2000*. Brussels: Centrum voor Bevolkings- en Gezinsstudie, pp. 252.
7. Zvidrins, P. and Z. Krisjane (2000), *Executive Report 1st Workshop on Demographic and Cultural Specificity and Integration of Migrants, Bingen 10-11 November 2000*. Brussels: Centrum voor Bevolkings- en Gezinsstudie, pp. 62.
8. Hintermann, C. (2001), *Report on the Technical Meeting on Demographic and Cultural Specificity and Integration of Migrants, Vienna 15-17 February, 2001*. Brussels: Centrum voor Bevolkings- en Gezinsstudie, pp. 22.
9. NIEPS and PRI (2002), *Workshop 5: Demographic and Cultural Specificity and Integration of Migrants, Helsinki 22-23 March 2002*. Brussels: Centrum voor Bevolkings- en Gezinsstudie, pp. 150.
10. Katus, K. (2002), *Executive Report 2nd Workshop on Demographic and Cultural Specificity and Integration of Migrants, Helsinki 22-23 March 2002*. Brussels: Centrum voor Bevolkings- en Gezinsstudie, pp. 34.
11. NIEPS and IRP (2001), *Workshop 3: Ageing, Intergenerational Solidarity and Age-specific Vulnerabilities, Rome 20-21 April 2001*. Brussels: Centrum voor Bevolkings- en Gezinsstudie, pp. 470.
12. Daróczi, E. (2001), *Executive Report 1st Workshop on Ageing, Intergenerational Solidarity and Age-specific Vulnerabilities, Rome 20-21 April 2001*. Brussels: Centrum voor Bevolkings- en Gezinsstudie, pp. 70.
13. Kotowska, I. (2001), *Report on the Technical Meeting on Ageing, Intergenerational Solidarity and age-specific vulnerabilities, Warsaw, 27-29 September 2001*. Brussels: Centrum voor Bevolkings- en Gezinsstudie, pp. 8.
14. NIEPS and NIDI (2002), *Workshop 6: Ageing, Intergenerational Solidarity and age-specific vulnerabilities, The Hague, 27-28 September 2002*. Brussels: Centrum voor Bevolkings- en Gezinsstudie, pp. 160.
15. Kotowska, I. (2002), *Executive Report 2nd Workshop on Ageing, Intergenerational Solidarity and Age-specific Vulnerabilities, The Hague, 27-28 September 2002*. Brussels: Centrum voor Bevolkings- en Gezinsstudie, pp. 20.
16. Avramov, D. and R. Cliquet (2003), *Critical Population Issues in Europe: Implications for Integrated Policies on Gender, Migration and Ageing*. Brussels: NIEPS (forthcoming), pp. 270.
17. NIEPS (2003), *Final Report on the Network for Integrated European Population Studies*. Brussels: Centrum voor Bevolkings- en Gezinsstudie, pp. 145.

Dissemination during the EU Contract

The following deliverables have been published. They have also been made available on the website of the NIEPS Coordinator (www.CBGS.be). Several other partners have also disseminated information on the NIEPS activities via their websites.

The NIEPS publications are:

NIEPS Workshop Proceedings

Kucerová O., T. Kucera (eds.) (2003), *Gender Relations, Family and Work*. Solicited Papers of the First NIEPS Workshop, Zharadsky Castle, Czech Republic, 15-16 September 2000. Prague: DemoArt 2003.

Jacobs, T., L.B. Knudsen, J.A.F. Cordón, G. Frinking, T. Willemsen, R. Crompton (2002), *The Impact of Policies on Family Formation and on Division of Labour*. Centrum voor Bevolkings- en Gezinsstudie in co-operation with the Network for Integrated European Population Studies (NIEPS). CBGS-Werkdocument, 2002/2. Brussel: Centrum voor Bevolkings- en Gezinsstudie.

Höhn, C. (ed.) (2001), *Demographic and Cultural Specificity and Integration of Migrants*. 1st Workshop organised by the Federal Institute for Population Research in Co-operation with the Network for Integrated European Population Studies (NIEPS), 10-12 November 2000, Bingen, Germany. *Materialien zur Bevölkerungswissenschaft, Heft 103*. Wiesbaden: Bundesinstitut für Bevölkerungsforschung.

Söderling, I. (ed.) (2003), *Workshop 5. Demographic and Cultural Specificity and the Integration of Migrants*. March 21-23, 2002, Helsinki, Finland. Population Research Institute/Vaestoliitto Working Papers E/16. Helsinki: Population Research Institute/Vaestoliitto.

Gesano, G., C. Höhn, (eds.) (2002), *Ageing, Intergenerational Solidarity and Age-specific Vulnerabilities*. Workshop organised by the IRP-CNR – Institute for Population Research and National Council for Research in collaboration with NIEPS – Network for Integrated European Population Studies, Rome, 20-21 April 2001. *Materialien zur Bevölkerungswissenschaft, Heft 103b*. Wiesbaden: Bundesinstitut für Bevölkerungsforschung.

Dykstra, P. (ed.) (2003), *Proceedings of the Second NIEPS Workshop on Ageing, Intergenerational Solidarity and Age-specific Vulnerabilities, The Hague, 27-28 September 2002*. NIDI Report No. 65. The Hague: NIDI.

NIEPS Monograph

Avramov, D., R.L. Cliquet (2003), *Critical Population Issues in Europe: Implications for Integrated Policies on Gender, Migration and Ageing*. Brussels: NIEPS (forthcoming). Table of contents included as Annex 1.

Follow-up Dissemination

The publication of papers in journals and monographs, presentations at scientific conferences and interaction with policy makers continue far beyond the lifespan of the EU funded project. Examples of scheduled activities in 2003 are:

- Policy implications of the NIEPS findings will be presented at a Hearing of the Parliamentary Assembly of the Council of Europe in Budapest, 6 May 2003;
- Survey methodological recommendations issuing from the NIEPS activities will be presented at an EU funded Workshop on Comparative Research of Fertility and Family surveys, Rome 30 June-2 July 2003;

- The scientific results of the NIEPS project will be presented and discussed at a special session of the forthcoming European Population Conference of the European Association for Population Studies (EAPS) in Warsaw, 26-30 August 2003.

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