

FINAL REPORT

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Title: Improving Policy Responses and Outcomes to Socio-Economic Challenges: changing family structures, policy and practice (IPROSEC)

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PREFACE

Within the Fifth Framework Programme of the European Union for Research and Technological Development (RTD), 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.

Since the launch of the Key Action in 1999 more than 1600 research teams from 38 countries have been mobilised. While most of these collaborative efforts involve researchers from EU countries, the participation of accession countries and new member states is already noteworthy with 189 research teams from these countries.

The Key Action was implemented through the launching of three calls for proposals addressing different but interrelated research themes which contributed to the objectives outlined above. These themes can be regrouped under a certain number of areas of major policy relevance, each of which is 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
16 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.

The insights and information that the reader will obtain in the following pages constitute the main scientific findings and the associated policy implications of the research project "**Improving Policy responses and outcomes to socio-economic challenges; changing family structures, policies and practices**". The work undertaken by this project, which brought together 10 research teams in a collaborative endeavour lasting 38 months, has certainly contributed to the advancement of knowledge particularly in the areas of **societal trends and structural changes** and of **gender, participation and quality of Life**.

The abstract and executive summary presented in the report offer to the reader the opportunity to take a first glance on the main scientific and policy conclusions, before going into the main body of the research provided in the other chapters of this volume.

As 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 in fostering research in the field of social sciences and the humanities.

A. SORS
Acting Director

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1. Executive Summary of Findings

The IPROSEC project was designed to inform policy by developing a greater understanding of socio-demographic change in Europe, the social and economic challenges such change presents, and the efficacy of the policy responses formulated by national governments and at EU level. The project was particularly concerned with changing family structures and relationships and their interface with policy. The project team analysed the policy process, inputs, outcomes and impacts and assessed the potential for cross-border learning and policy development.

Comparisons of socio-economic change in EU member states and candidate countries showed that, in the closing decades of the twentieth century, trends were generally moving in the same direction. However, not all countries started from the same base, and change has been occurring at a different rate and pace both between and within countries. What is seen as problematic in one society may not be considered as a cause for concern elsewhere. Nor is the level of debate and of policy interest necessarily commensurate with the extent of change and its actual or potential implications. Although the challenges raised may be similar, the approaches adopted by governments in response to change vary according to the policy environment, the political and economic climate and the legitimacy and social acceptability of state intervention in family life.

POPULATION DECLINE AND AGEING

Fertility rates are falling

Women in Europe today are producing only 1.48 children. Among the IPROSEC countries, in 2000, East Germany (1.22), Italy (1.24) and Spain (1.23) displayed the lowest total fertility rates. Ireland (1.89) and France (1.88) recorded the highest rates.

The main challenge presented by declining fertility and rising childlessness, not only where fertility rates are very low, as in Germany, the southern European and candidate countries, but also where they are above the EU average, as in Sweden and France, is whether governments should intervene to curb falling birth rates and encourage childbearing and, if so, what measures they should take.

Responses to falling fertility vary across Europe. Most societies reject prohibitive and pro-natalist policy measures to influence population size. However, legislation in Poland restricts abortion and contraception, and abortion is illegal in Ireland.

All IPROSEC countries except Spain and the UK provide higher levels of benefit for larger families or supplementary benefits. Tax breaks are granted for children in France, Germany, Greece, Spain and Hungary, and tax relief is given from the third child in Estonia.

The outcomes of policy measures are difficult to assess. No evidence is found that negative or prohibitive measures increase fertility. Nor is unequivocal evidence available to show that supportive family policy measures necessarily result in an increase in the birth rate or family size. However, the lack of such measures and of effective economic and employment policies would seem to be contributing to falling birth rates.

Population is not being replaced

By 2000, completed fertility rates across the Union had fallen below the replacement level of 2.1 children for women born in 1960, except in Ireland and France. The lowest levels were reached in West Germany (1.60) and Italy (1.67). In West Germany, Ireland, Italy and England and Wales, one woman in five is remaining childless.

The challenge presented by non-replacement of population is primarily how to sustain the future labour supply and ensure continued economic and social development.

Government responses are focused on proactive measures to bolster the labour supply, including the removal of barriers to labour market entry for young people, tax and social insurance incentives for employers taking on unemployed and underemployed workers in areas of labour shortage, and measures to retain older workers.

It is too early to assess the long-term outcomes of most of the responsive measures being put in place to offset the negative effects of non-replacement of population. However, employment levels appear to be rising among underemployed population groups, especially women, in northern Europe and Ireland.

Measures to achieve more balanced funding of benefits and services appear, as yet, to be having very little impact on levels of spending.

Population growth is negative

Natural population growth has slowed down to 1 per 1000 across the Union. By 2000, it had fallen below 0 in Germany, Greece, Italy and Sweden, and in 8 of the 10 candidate countries. The Union as a whole could experience negative natural population growth within the next decade.

An important challenge raised by the prospect of negative natural population growth is whether to relax control over non-EU immigration, while intervening to promote the integration of foreign workers into the host community and prevent racial tensions from developing.

The responses of governments indicate a reluctance to relax control over non-EU immigration, except for the recruitment of well-qualified working-age migrant labour in areas of labour and skills shortages. Supportive measures are being implemented to integrate migrants and their families and relieve ethnic tensions.

The available evidence on outcomes suggests that non-EU immigration is sustaining population growth in Germany, Greece, Italy and Sweden, and that measures to promote multiculturalism have moved onto the political agenda in many countries.

The population of Europe is ageing

The proportion of older people in the population is increasing at a faster rate in the Union than in other developed countries except Japan. In 1975, at birth, average life expectancy was 70 years. In 2015, most people will live to be at least 75, and in France, Germany, Italy, Spain, Sweden and the UK, they can expect to live to be 80. Life expectancy is much lower in the three candidate countries.

The challenges raised across Europe by population ageing are how to mitigate its negative financial effects on society, how to ensure the future viability of pension schemes and the provision of good quality, affordable social and medical care for older people, and how to prevent age discrimination (ageism).

Governments in northern Europe and the UK are responding by encouraging research into diseases associated with ageing and by promoting campaigns to reduce health risks. Ageism is being outlawed. All countries are reforming their pension systems. Ireland, Italy, Spain, the UK, Estonia and Poland are developing public-private partnerships and fostering greater involvement of voluntary organizations in service delivery.

The full impact of population ageing on pension schemes has yet to be felt. The measures being taken may help to alleviate the situation, but probably at the cost of higher contributions from employees, lower pensions, a longer working life and greater expenditure on care provision. The 'business case' for retaining older workers is being recognized in some countries.

CHANGING FAMILY STRUCTURE

Family formation is being postponed

Age at marriage and childbirth are being postponed. Across the Union, between 1960 and 2000, age at first marriage rose by 4 years to 30 for men and 28 for women. Average age at childbirth reached 29. The number of teenage pregnancies has been falling across the Union, but in the late 1990s the level remained very high in Estonia with 132 per 1000 women aged under 20, Hungary with 119 and the UK with 145, compared to 35 in Sweden.

Although changes in patterns of family formation are similar in many respects across Europe, the challenges they present are perceived differently. Few governments show concern about delayed marriage and first births. In the UK and Hungary, they are looking, rather, for ways of dealing with the high level of teenage pregnancies. In Estonia, the challenge is the large number of teenage abortions.

Some governments are responding with measures designed to influence the timing of family formation. In Sweden, a speed premium is paid to women who have their second child within 21 months of the first. Measures have been taken to discourage teenage pregnancies in all IPROSEC countries except Germany, Greece, Estonia and Poland. They include guidance on contraception in sex education programmes and, in Sweden, counselling clinics.

Contraceptives are made available in schools in France. Reproductive health is being promoted in Estonia, and incentives are given in the UK for teenage girls to engage in education and training, and to enter employment.

Delayed family formation has not been reversed. Teenage pregnancy rates have fallen in the UK, but not to the same extent as in Sweden. Data on teenage pregnancies and abortion rates in Estonia indicate that both rates are falling. In all three countries, it is difficult to determine whether the decline is due to specific policy measures or to wider socio-economic pressures.

Families are becoming de-institutionalized

Marriage rates have been falling across Europe since the 1970s. By 2000, among the IPROSEC countries, Estonia recorded the lowest level, with 4 marriages per 1000 population, compared to 10 in 1960. The number of marriages ending in divorce has been increasing. By 2000, the highest level was reached in the Nordic states, the UK and Estonia, where more than 40% of marriages contracted in the early 1980s ended in divorce. Much lower rates were recorded in the southern European countries, Ireland and Poland.

Unmarried cohabitation is a widespread living arrangement in northern Europe, accounting for about 20% of all cohabiting couples. In southern Europe, rates fall to 1–5%.

Extramarital births are most widespread in Sweden and Estonia, accounting for over 50% of all births, compared to single figures in Greece and Italy, and 12% in Poland. By the late 1990s, almost 10% of children aged under 15 were living in lone-parent households across the Union, ranging from 20% in the UK to 3% or less in Greece and Spain.

Concern is expressed in Germany, Greece, Ireland, Italy and Poland, on religious and moral grounds, about the extent to which family de-institutionalisation poses a threat to social order. More widely, the challenge for governments is whether to intervene in the private lives of families to discourage the development of alternative family forms, and/or to extend the rights and duties of unmarried cohabiting couples and of children in relation to their biological parents.

An issue for governments that commands considerable support is how to deal with instability and insecurity within families and, more especially, with domestic violence and abuse.

In countries, such as Ireland, Italy and Poland, where the public is more accepting of government intervention to prevent the development of alternative family forms, divorce law is restrictive. Tax incentives are used to encourage conjugal families in Germany, Italy, Estonia and Poland.

Most governments are introducing permissive measures to formalize rights and duties within alternative living arrangements, including the creation of legal contracts for unmarried cohabitantes, extending to same-sex couples in France, Spain (in some regions) and Sweden.

Everywhere, parents are obliged to maintain their children, and legislation is being implemented to make parents responsible for their children's misdemeanors. The absent parent is pursued after divorce or separation, except in Greece. A few countries are laying down the legal obligations of step-parents in reconstituted families.

Cases of domestic violence and abuse are being taken up in the courts. Voluntary associations are actively involved in providing support services.

Prohibitive legislation restricts the number of divorces, though not the number of formal or informal separations.

Proactive measures to promote the formal two-parent married couple are not associated in the statistics with markedly higher marriage rates or consistently lower unmarried cohabitation rates.

In countries where de-institutionalised family forms are widespread, law reform extending rights to non-conventional families has largely removed the stigma by legitimising and normalising de facto situations. Cases of domestic violence are attracting media attention. They are being more widely reported to the authorities and are, more often, being brought before the courts.

Inequalities between families are growing

Increasing disparities are found in the standards of living of families within and between countries. Within societies, lone-parent and large families, and older people living alone are most exposed to poverty. The gap between work-rich and work-poor families has widened.

While the social benefits received by families and children by head of population rose during the 1990s across the Union, regional variations increased. The highest level of spending on families was recorded in Ireland and Germany, and the lowest in Italy. The proportion of persons in households receiving family-related benefits ranged from 63% in Ireland to 4% in Spain, and 7% in Italy.

Differences in income, provision and delivery of services are found between north and south in Italy, East and West Germany, the regions in Sweden and the UK, and rural and urban areas in Ireland, the southern European and candidate countries.

An important challenge for governments is how to reduce the marked disparities in the standards of living of families between and within societies.

The problems of poverty and indebtedness have heightened the debate about the extent to which governments should intervene in the private lives of families and about the relative merits of universal as opposed to targeted benefits and services for families at risk of falling into poverty.

Many governments have been responding to inequalities within society by targeting support on families most in need, although the case for targeted child benefits and family allowances is not supported in all countries, as illustrated by the case of Estonia.

All IPROSEC countries, except Greece, Italy and Poland, operate income redistribution schemes, including national minimum income guarantees. Free medical and housing subsidies are provided in most countries for low income groups. In some cases, provision is made for lone parents, increasingly through incentives such as subsidized childcare, to enable them to become self-sufficient.

National governments in Germany, Italy, the UK and Estonia are directing resources towards less developed regions. The urban–rural divide is being addressed in Sweden, the UK and Estonia through schemes to improve rural infrastructures.

Policies to redistribute incomes between social groups and regions are credited with having a positive impact on income inequalities in some countries, for example France, but they have not eliminated pockets of poverty. Policy measures targeted at families during periods of family transition offer a safety net and security for families and help to prevent them from falling into poverty, particularly in northern Europe. They also play a redistributive role, since they are often means-tested and operate according to the principle of social solidarity.

In southern Europe, governments are strongly criticized for the low level of provision, which is considered inadequate to prevent poverty and is no substitute for family support. In the candidate countries, the substantial reduction in public policy provision and the withdrawal of certain benefits and services for families in the post-Soviet era have had a detrimental impact on family well-being by creating and, at the same time, fuelling widespread unemployment and poverty.

CHANGING GENDER RELATIONS

The life course is gendered

On average women in Europe can expect to live 6 years longer than men. Life expectancy at age 60 is 24 for women and 19.6 for men. The discrepancy between the sexes at birth is most marked in Estonia, with 11 years. More women are likely to be living alone in old age: 57% of women aged over 75, compared to 24% of men, ranging from 69% of women in Germany to 13% of men in Spain.

In all the IPROSEC countries except Germany, women outnumber men in tertiary education: by 130 to 100 in Sweden, Estonia and Poland by 2000. In Germany, men outnumbered women by 100 to 90.

Women are spending longer – three-quarters of their life span – outside activities associated with childbearing and raising, but they remain under-represented in public life and government.

Parity has been reached in Sweden in national government. In the southern European and candidate countries, women account for fewer than 20% of members of national governments.

Disparities in life expectancy between men and women, the under-representation of women on public bodies and the underperformance of men in education raise challenges for governments, who have to decide whether to use positive discrimination or other measures to support women in old age and in public life, and men in education.

Gender inequality in old age is not being directly addressed by specific measures targeting women in most IPROSEC countries, though the state provides some form of pension credit in recognition of time spent out of the workforce performing caring tasks.

In France, Germany, Sweden, the UK and Estonia, media campaigns and quotas are being used to attract more women into public life, and efforts are being made to recruit more men into teaching, in an attempt to provide male role models for boys.

Measures recognising time spent out of the labour market are contributing to improved pensions, but are not helping older women who do not have a sustained employment record.

More women are being attracted into public life in northern European countries, where campaigning is most active and where awareness of opportunities for women is greatest, even if parity is far from being achieved.

Working patterns are gendered

Across the EU, women with higher levels of education come closer to male patterns of employment. The disparity in employment rates among women by level of education is over 40% in Italy and Spain.

In the EU, women are taking more than half the new jobs being created. The overall employment gender gap for working age population fell from 24 points in 1990 to 18 points in 2000, with the smallest gap in Sweden and the widest in Greece. In the candidate countries, employment rates for both women and men fell sharply during the 1990s.

In 2000, women accounted for over 44% of the total population aged 25–49 in employment in France, Germany, Sweden and the UK, and for less than 40% in Greece, Italy and Spain. Female rates were closest to male rates in Sweden with 80%, compared to 84% for men, and furthest from them in Spain, with 53%, compared to 86% for men.

In the context of declining birth rates, an ageing labour force, skills shortages and strong economic imperatives, the main challenge for government is how to strike a balance between the need to maintain and widen the fiscal base, generate a flexible labour force, and use the available skills to the full, while preventing gender discrimination and ensuring effective implementation of equality law.

Under EU law and in the employment guidelines, governments are formally committed to increasing employment rates among women. They are using incentives such as (re)training schemes and support

services to encourage more women to enter and remain in employment. Maternity leave and the reinstatement of women returners are mandatory.

Most of the new jobs being taken up by women are in the public sector, where working conditions are more strictly protected and monitored. Domestic service jobs have been regulated to bring employees into the formal labour market and provide social insurance cover in France, Spain, the UK and Estonia.

Maternity leave is funded in all the IPROSEC countries from social insurance. The cost for employers of paid parental is being alleviated in Germany, Italy, Sweden, Estonia and Hungary by funding leave through social or parental insurance. In France, childrearing benefit is financed by the family insurance fund. Employers in France, Italy, Sweden, the UK, Estonia and Hungary are, however, expected to meet the cost of paying for replacements recruited during the leave period.

Governments in France, Ireland, Sweden and the UK have developed formal structures for monitoring gender equality and for hearing complaints.

The cost of policing and of bringing cases of sexual discrimination and harassment before the courts may be met from legal aid in France, Spain, Sweden and the UK.

Employers in countries with effective systems for monitoring, policing and sanctioning gender discrimination in recruitment, training and employment are more likely to be aware of gender policies and to implement them, thereby reducing gender disparities. Where employers are able to offset the costs of maternity against insurance concessions, they are less hostile towards the employment of women.

The public sector is widely seen as gender aware and woman friendly. Where domestic and services jobs are regulated and protected, women's work has been brought into the formal economy. However, both types of employment reinforce gender segregation and the pay gap.

Work-life balance is gendered

Dual earning became increasingly common during the 1990s. The presence of children is still associated with a fall in dual earning in Germany, the UK, Ireland and France, but with a higher rate in Greece and Spain. In Italy, the level remains unchanged. The number of children has a depressing effect on mothers' employment rates in Germany and the UK for the first child. Employment rates are affected in all countries as the number of children increases. The smallest effect is found in Greece.

Female part-time employment rates in IPROSEC countries range from almost 45% in the UK, where relatively large numbers of women are in the labour force, to 8% in Greece, where small numbers of women are in employment. In the candidate countries, few women are employed part time, and both men and women work long hours.

Across Europe, irrespective of their employment status, women continue to perform a larger share of domestic tasks than men. Over 80% of employed women claim the main responsibility for housework and shopping; 45% perform child and elder caring tasks, compared to 20% and 25% for men.

Rising employment rates among mothers present two main policy challenges for governments: whether and how to help couples reconcile family life and employment; and whether and how to assist both men and women in balancing employment and other activities, including domestic and care work.

Governments in France, Germany, Sweden and the UK, in particular, are encouraging employers to promote a family-friendly workplace, by introducing practices such as job sharing, flexible working arrangements, including part time, reduced, compressed and annualized working hours, term-time working and teleworking. In the UK, governments have argued the business case for work-life balance in partnership with industry.

In northern Italy, schemes have been introduced to make opening hours of schools, shops and services, and the provision of public transport more amenable to work-life balance.

Governments in France, Germany, Ireland, Sweden, the UK, Estonia and Hungary are committed to ensuring adequate provision of good quality affordable child and elder care. In Germany and the UK, the voluntary sector is closely involved in delivery. Ireland, Italy, the UK and Poland are developing public-private partnerships, with a view to reducing the cost for public funds.

To encourage greater involvement of men in parenting, in all the IPROSEC countries men are entitled to take paid paternity leave. In Sweden, in an attempt to change attitudes at the workplace towards men taking leave for family reasons, full leave entitlement is conditional on take up by men.

In some countries, strict regulatory frameworks have resulted in employers developing avoidance strategies that militate against gender equality. Elsewhere, less rigid practices in the framework of human resource policies are proving to be effective.

Public policy enforcing statutory working conditions and time policies can make paid work and family activities more compatible for both men and women, and can have a positive impact on decisions about family formation and the sharing of household tasks.

CHANGING INTERGENERATIONAL RELATIONS

The dependency imbalance is growing

In 2000, the population aged 60 and over accounted for a larger proportion of total population than that aged under 20 in Germany, Greece and Italy. Within the EU, Sweden, Italy and Greece, respectively, recorded the highest old age dependency ratios in relation to working age population, and Ireland the lowest. The age dependency ratio was more heavily weighted towards the younger population in the candidate countries due to relatively low life expectancy.

A major challenge for governments is how to manage the impact on the labour force and on government spending of the growing imbalance between the population of working age in employment, who are producing wealth and paying taxes, and the young and older dependent populations, who are primarily consumers of goods, benefits and services.

Governments in EU member states are committed to producing national strategies to promote solidarity between and within generations. They are also under an obligation to control public spending.

Within the EU, since the mid-1990s emphasis has been on childcare strategies to enable women with children to participate fully in the labour force. Schemes are being introduced to enhance the employability of older people through retraining programmes in Italy, Spain and Sweden, and lifelong learning in France, Germany and the UK. The age of retirement is being postponed to delay labour market exit in Germany, Italy, the UK and Estonia, and disincentives have been introduced to curb early retirement in Italy, Spain and Sweden. Flexible, or phased, retirement, is being brought in everywhere except Greece, Ireland and Poland.

Public childcare strategies are credited with enabling more women to enter and remain in employment when they have young children, raising parents' expectations of public service provision. Solidarity contributions and pension reserve funds are proving to be effective in countries such as France and Spain, where the age imbalance in some occupations had become critical.

Intergenerational dependence is increasing

Young adults everywhere are experiencing longer periods of financial dependency due to later labour market entry. In southern Europe, in particular, young people are delaying leaving the parental home. In 2000, the youngest age at which at least 50% of young people were no longer living with their parents was over 29 in Italy, Spain and Greece.

Northern Europe is characterized by relatively high proportions of one-person households, and southern Europe and Ireland by the relatively large number of multigenerational households. Ireland records the largest proportion of households with three or more adults living with dependent children, and Sweden the smallest proportion.

In southern Europe, older people receive a relatively large proportion of social transfer payments: in Italy, 41% of persons live in households that receive an old-age or survivor's pension, compared to 22% in Ireland. In Germany, Italy and Spain, children below the age of 16 are most exposed to poverty. In Greece, Ireland and the UK, the group aged 65 and over is most at risk of falling into poverty.

In the face of the growing awareness of the threat posed by the demographic time bomb for the intergenerational contract and for solidarity between the generations, the challenge for governments is whether and how to enforce family obligations and responsibilities and how to deal with growing tensions between the generations.

In the Nordic countries, the state assumes the main responsibility for the well-being of young and older dependants. In France and Germany, families are held legally responsible for their dependants. The state plays a strong supportive role in the provision of services, together with the voluntary sector in Germany. In the transition countries, families are legally responsible for their members, and are less reliant on the state and employers for support than during the Soviet era. In Ireland and the UK, family relationships are not strictly regulated. State support is combined with heavy reliance on the private sector. In southern Europe, in law and practice, families have primary responsibilities for their own members, with minimal support from the state.

Punitive legislation is applied against family members who fail to carry out their responsibilities. Except in Greece, children can be taken into care if parental control is inadequate or children are at risk. Governments in France, Germany and the UK are implementing measures through the courts, to protect older people from abuse by family members.

Cutbacks in public spending on services, such as childcare, and residential homes for children and older people, together with the growing need for financial, social and medical support in old age have placed greater pressure on families, to the extent that they are beginning to question the moral, legal and financial obligation to assume responsibility for their relatives.

Caring needs are becoming greater

The changing age balance, in combination with later labour market entry and earlier labour market exit, has resulted in a concentration of economic activity over a shorter proportion of the life span and a heavier burden of financial and practical caring for the pivot or sandwich generation, particularly in the southern European countries. Everywhere, women are more likely than men to be involved in childcare on a daily basis. With very few exceptions, they also provide more elder care. Much larger proportions of men and women provide childcare as compared to eldercare.

As traditional carers are unavailable or reluctant to assume the burden of care work, the challenge for governments is how to ensure the provision of good quality affordable care for children and older people.

The state intervenes in the provision of care for dependants through a mix of cash benefits and services, often in conjunction with the private and voluntary sectors, and involving varying degrees of commodification. France and Sweden make relatively generous provision for childcare, and other EU countries are committed to raising their level of provision. In the candidate countries, the formerly generous provision of childcare has been cut back since transition. Public childcare is limited in Germany, and provision depends heavily on the voluntary sector. In the UK and Ireland, public-private partnership arrangements operate at local level. Public provision of childcare in Greece, Italy and Spain is minimalist. In France, Germany, Italy, Spain and Hungary, tax relief is provided for home helps and childminders, and the UK low income tax credit has a childcare component.

Care work for older people is being increasingly regulated and protected. In most countries, direct payments are made to care givers and/or receivers, in some cases including close relatives, for care at home. Provision is often funded and delivered at local level. It is most generous in northern Europe.

More women are being paid to care for the relatives of other women who are in full-time employment. Payment to relatives is lending social recognition and a monetary value to family care work, but the future provision of quality elder care remains critical.

2. Background and Objectives of the Project

As set out in the Technical Annex to the project, the IPROSEC team was seeking, primarily, to address the issues and challenges raised under the theme for Societal Trends and Structural Changes in the Framework Programme 5 call. The research was particularly concerned with Task 1, taking family change as its frame of reference to investigate the multiple, interlocking dimensions of socio-demographic change and their relationship to policy from a comparative perspective.

The research aimed to inform policy by developing the knowledge base on the social situation in the European Union, to increase the understanding of the policy process, of the policy options available to meet socio-demographic challenges, and of their possible social and economic impacts. The research, thus, set out to enhance the decision-making capability of policy actors.

To achieve the overall aims of the project, the project team undertook a multidisciplinary comparative analysis of changing family structures, policy and practice in eight EU member states (France, Germany, Greece, Ireland, Italy, Spain, Sweden, United Kingdom) and three applicant countries (Estonia, Hungary and Poland), representing different socio-economic, cultural and political environments. The researchers were seeking to make proposals for improving the efficacy of policy responses and outcomes to socio-economic challenges at EU and member state level, taking account of national diversity.

In identifying the challenges that changing family structures pose for society over time, the analysis was attempting to capture the relationship between family change, shifting attitudes towards paid and unpaid work, working patterns, quality of life and leisure (Task 2). It investigated the ways in which family change impacts on welfare systems and the shifting balance between public and private provision of services, including education and training (Tasks 3–5). The gender dimension was a major theme underpinning all aspects of the research. Thematically, it was central to an understanding of new family structures, since the reproductive function of women continues to determine their identity within families. The research thus contributed to an evaluation of the effectiveness of the mainstreaming approach and of the political commitment at EU and national level to the promotion of gender equality.

The project was designed to update previous work carried out by members of the research team, to extend the knowledge base to candidate countries, and to undertake systematic cross-national comparisons. It involved new empirical work, not only with policy actors but also with policy users, investigating the policy process and the factors impinging on decisions about family life for both men and women. The research team aimed to provide more satisfactory answers to the key issues raised by the interactive relationship between policy and practice. The team members examined why certain policy settings are more receptive than others to policy diffusion, with reference not only to economic and political factors but also to public opinion, with the focus on the impacts of policy decisions on the everyday lives of individuals within their family contexts.

The research incorporated the European dimension by adopting a multilevel analytical framework, reflecting the multi-tiered governance of the EU. At the macro-level, it addressed the concerns of the EU as a supranational form of governance, and drew on datasets harmonized at EU level and on surveys conducted by European agencies. At the meso-level, it examined national social situations, the policy process and compliance with EU legislation. At the micro-level, it probed the phenomenon of changing family structures in relation to different socio-economic, cultural and political settings. The research was relevant to the concerns of the EU in that it demonstrated how membership of the EU can impact on national law and practice, and how national governments, reflecting different socio-economic and political structures, contribute to the policy process within EU institutions. For the European Commission, the project aimed make a contribution to knowledge about the social situation in member and applicant states, and thereby to EU-level policy formation, particularly with reference to the family and gender dimensions of the issues of employability, social inclusion, population ageing and enlargement, highlighted in the *Social Action Programme for 1998–2000* (COM(98)259 final).

The countries selected for analysis are members of the EU or applicant states. Although they all, therefore, fall within its sphere of influence, they represent different waves of membership, political economies, patterns of welfare provision and concepts of civil society. Membership of the EU confers a certain identity of purpose through the common goals to which governments subscribe as a condition of membership. At the

same time, they exhibit cultural and social diversity at national and subnational level, due to the specific ways in which their legal, political, economic and socio-cultural systems have developed and operate. The four waves of membership between the 1950s and 1990s altered not only the size but also the socio-cultural structure of the Community/Union. The addition of new members from Central Europe, the Baltic and Mediterranean regions in the twenty-first century is expected to bring further changes in the shape of social Europe. The analysis of phenomena at micro-level within their societal context was intended to make it possible to identify and explain similarities and differences in the reasons for behaviour, attitudes, policy inputs and outcomes, to establish linkages between policy and socio-demographic change, and to assess the transferability of policy solutions between national contexts mediated by the EU, and the potential for policy learning.

The research design was explicitly comparative. The research process was carefully monitored to provide a database of examples of good practice for other work sponsored by the European Commission. Although the project was co-ordinated by experienced cross-national researchers, it involved a number of less experienced researchers and included countries that have hitherto had relatively few opportunities to participate in international projects. The proposal required the mobility of researchers between countries (workshops, cross-border interviews, academic visits), thus affording opportunities for the exchange of ideas and information and for training European researchers. The project also contributed to the Commission's target of encouraging women to engage in European research: the co-ordinator was a female academic, and 21 of the 29 researchers working on the project were women, a larger proportion than was originally planned.

3. Scientific Description of the Project Methodology and Results

The research was designed to ensure that the materials collected at each stage could be compared across disciplines and nations. The countries were chosen to represent different waves of EU membership and a range of socio-economic, political and welfare regimes. The participation of candidate countries allowed their interests to be taken into account in the future development of European social policy.

3.1 ORGANIZATION OF THE RESEARCH

The schedule for collecting information about the social situation and the policy process, and for conducting the empirical work was agreed between the participants, the methods and findings were monitored and compared throughout the duration of the research, and the data were analysed from a comparative perspective in the consolidated reports drafted at the end of each of the three stages. The three stages of the project overlapped, to enable the participating countries to begin the next stage of the work while the Co-ordinating Team was drafting the consolidated reports. In addition, Stage 2 built on work carried out in Stage 1, and Stage 3 was a development from the analysis produced in Stages 1 and 2.

Stage 1 (15 months) of the project was concerned with the socio-demographic and political context of the research, and combined secondary analysis of quantitative trends with background information about the policy environment. In conjunction with the partners in France, Germany, Ireland, Italy, Spain and Sweden, the Co-ordinating Team updated and supplemented European and national data collected in the course of an earlier study for the Commission (Project No SOC 97 100931). The contractors in each of the participating countries for which data had not previously been collected in the form required by the project (Estonia, Greece, Hungary and Poland) assembled and collated national data from statistical offices, media, and policy documents, with support from the research assistants. The changes observed in family structures were catalogued for all the countries participating in the project, and an inventory was provided of the policy and media debates surrounding them. The statistical data and policy context documents were distributed to the partners on CD-Rom.

The Management Team agreed the schedule for the interviews. The contractors in all the participating countries then conduct interviews with policy actors (local and central government, trade unions, employers organizations, NGOs). The materials were logged onto a database, examined comparatively and critically by the Co-ordinating Team, and presented in a consolidated report. The national reports were also distributed to partners on CD-Rom.

Stage 2 (15 months) involved a combination of qualitative research methods (telephone/postal surveys, focus groups and in-depth interviews), with the purpose of generating the maximum amount of information about the family decision-making process within selected family types in each of the participating countries. The qualitative approach was adopted to investigate the factors contributing to individual decisions about family building and changing family structures during the life course. After receiving appropriate training, the research assistants undertook the fieldwork, according to a common, agreed schedule and respecting a strict ethical code of practice. Telephone and postal surveys were used to question approximately 250 respondents, followed by up to 50 in-depth interviews and focus groups and vignettes, with individuals selected to represent different family arrangements, and also regional and ethnic diversity within nation. Each team extracted the information required from the surveys and interviews, situated it in relation to other national studies and to the findings from the first stage of the project, and forwarded it, together with their own interpretation, to the Co-ordinating Team for comparative analysis. The materials were again be logged onto the database, examined comparatively by the project Co-ordination Team and presented in a consolidated report. National reports were made available to team members on CR-Rom

Stage 3 (12 months) was devoted to comparative analysis of the quantitative and qualitative materials from the first two stages, using a societal approach to assess whether, and if so how, policy solutions can be transferred from one country to another. During this stage of the research, the Co-ordinating Team worked closely with the contractors in carrying out the comparisons and preparing the reports. The dissemination activities were structured around a series of end-user dialogue group meetings between project team members, and end-users in the participating countries, culminating in a dissemination conference at which the focus was the potential for, and obstacles to, policy transfer and policy diffusion. The findings were

presented in working papers and a final report, which were disseminated through a series of publications, including several book-length publications.

3.2 METHODOLOGICAL ISSUES

Selection of country cases

For practical reasons, it was not feasible to include all EU member and applicant states in the IPROSEC project. Nor would it have been appropriate to limit the research to only two or three countries. To ensure that the country mix was sufficiently diversified to enable the project team to meet the aims and objectives of the research, a form of stratified sampling was adopted in selecting countries from successive waves of membership of the European Economic Community (EEC), European Community (EC) and European Union (EU). Although the 11 countries share a common reference point by virtue of their actual or potential membership of the EU, they represent quite different socio-economic, cultural and political environments, as well as varying stages and types of welfare development (Appleton and Hantrais, 2000, pp. 4–6). They all subscribe to a common set of goals and are required to comply with European law. However, due to the multilevel system of European governance, they also contribute to supranational policy formation through their representation within European institutions. As nation states, they have clearly defined territorial boundaries and their own administrative and legal structures. At the same time, they exhibit considerable internal diversity in terms not only of socio-demographic and economic characteristics but also of policy development and delivery.

Three countries were selected from the founding member states of the European Economic Community (EEC) that set the initial parameters of the governing treaties: France, Germany and Italy. Although they shared a similar approach to social protection, based on corporatist employment-related insurance schemes, and have been rated high on ‘conservative’ attributes in welfare regime theory (Esping-Andersen, 1990), they offer very different levels of social protection for their citizens. Two countries from the second wave of membership of the European Community (EC) in 1973 – Ireland and the United Kingdom – were chosen to represent the tradition of universal provision of services outside the market (Titmuss, 1974), and the subsequent shift towards a more residual welfare model, increasingly reliant on means-testing and the private sector for funding and delivery. Greece and Spain, the southern European countries that joined the EC in the third wave of membership in the early 1980s, had in common with Italy that their welfare systems were based on employment-related social insurance, but social protection was, and continues to be, less developed and underfunded compared to their northern neighbours. Sweden, the fourth wave member state that joined the European Union (EU) in 1995 represented the Nordic, social democratic welfare model. Three of the candidate countries set to join the EU in 2004 – Estonia, Hungary and Poland – were included in the project as examples of post-communist welfare systems. In seeking to meet the conditions laid down for membership of the EU within the context of an emergent European social model, they had in common their experience of profound restructuring of their social, economic and political systems as they moved away from a regime that had relied heavily on bureaucratic state collectivism to deliver welfare.

The mix of countries was a central concern in determining the aims and objectives of the project in that it was intended to enable the research team to compare and contrast the family policy process within different welfare environments, in an attempt to identify context-specific ways of improving policy responses and outcomes to the challenges presented by socio-economic change. The combination of countries with different conceptions of welfare provided a very fertile terrain for the analysis of inputs, outcomes and processes in an area of policy that involves a complex interweaving of multiple levels of governance and the frequently conflicting interests of numerous policy actors.

Statistical data collection and analysis

Many of the data issues that had to be confronted by the IPROSEC project team were already addressed in a study conducted in 1998 for Directorate General Employment and Social Affairs, and are reported in 1999 in *Cross-National Research Papers*, 5 (1) *Interactions between Socio-Demographic Trends, Social and Economic Policies*.

The main data sources used in the IPROSEC project were Eurostat, Council of Europe and United Nations, supplemented by data supplied by partners from national sources. The notes below indicate how the data were compiled and where caution needs to be exercised in interpreting them.

A number of problems were unresolved due to missing time series data, as can be seen in many of the figures, changes in variables over time, for example for employment data, and incompatible, unreliable and non-harmonized sources, particularly for the candidate countries, which are not, for example, included in the European Labour Force Survey (ELFS) or the European Community Household Panel (ECHP) survey. Where Council of Europe data were used, for example in Figure 4.2 (see Deliverable n° 7.3.1.8 for figures), no EU15 weighted mean was available.

The following method was used to compile the four composite graphs (Figures 3.9, 4.9, 5.17, 6.9). For each indicator, the standard deviation (SD) was calculated for EU15. For each country cell, the deviation of each data point was calculated from the EU15 mean (x-mean) and was compared with the value of the SD for each indicator. Positive or negative values were then assigned according to the number of SDs (0.5 points for $\frac{1}{4}$ SD, 1 point for $\frac{1}{2}$ SD, 2 points for 1 SD, 4 points for 2 SDs). The scores for each group of indicators were then added together and plotted on the x and y axes.

These graphs provide useful summaries of the relative situation in each of the countries and an indication of change over time. However, it must be remembered that they are constructed with reference to an EU15 mean and do not necessarily reflect the trend in a single country. It was necessary in some cases to calculate the mathematical mean when the EU weighted average was not supplied by the data source. Where data were missing at one of the data points, a proxy or estimate was used to avoid a skewed result. Using EU15 as the mean presented problems when producing indicators for the candidate countries, particularly for 1980s data, because their positions would have been off-scale, as for example in Figure 4.9.

The United Nations' Gender-related Development Index (GDI), used in Figure 5.17, is based on the same variables as the Human Development Index, covering life expectancy at birth, educational achievement, and income, but the results are adjusted according to the level of gender inequality, thus producing a global ranking for human development and gender equality.

Figures 5.9, 5.10 and 5.13 were compiled by Anthony Abela from the University of Malta, one of the project's advisors, from the 1999/2000 European Values Survey for the IPROSEC countries, based on weighted cases by country. They use the IPROSEC average rather than the EU15 average.

The data used in Figures 5.16, 5.17 and 6.8 on household tasks and caring were supplied in 2003 by the European Foundation for the Improvement of Living and Working Conditions from their 'Third European Survey on Working Conditions', carried out in 2000. Indicators for the distribution of household tasks must be interpreted with caution, particularly over time and space, due to incompatibilities in the phrasing of questions and reporting bias.

Indicators for household living arrangements, for example as used in Figures 4.8, 5.3, 6.5, 6.6, were problematic due to inconsistencies in data from the ELFS, compared to census and ECHP data. Unmarried cohabitation, lone parenthood and family reconstitution are particularly difficult to track (Figures 4.4, 4.7). Consistent time series datasets are not available for poverty measurements throughout the period covered by the research (to 2000) (Figures 4.10, 6.7).

No data were available for employment rates by number and age of children for the candidate countries (Figure 5.11). The ELFS changed the age groups in 2000 to 25–49, which meant that the new data were not comparable with those for 1990, 1995. Data for 2000 were obtained directly from Eurostat for the same age group, but excluded Ireland, which had to be calculated using estimates from earlier data points.

Policy context analysis

The information collected on national policy contexts drew on policy documents, opinion surveys, scientific studies and media debates about the four overarching themes of the project: population decline and ageing; changing family structure; changing gender relations; and changing intergenerational relations. Participants

were asked to respond to an agreed set of questions, involving analysis of what the literature has to say about the policy challenges that are facing governments as a result of socio-economic trends; the ways in which the issues raised by socio-change are being addressed by policy actors in different national contexts; and the possible impact of social, family and economic policies on socio-demographic behaviour.

The aim in answering the first set of core questions was to determine to what extent, according to the literature, the socio-demographic trends recorded are perceived by the scientific community (academic studies), the population at large (national surveys, press coverage) and by policy makers (policy documents and reports) as giving rise to problems.

In the second set of questions, partners were asked to report on the level (insurance, taxation, public spending, institutionalization) and form (prohibitive, permissive, proactive measures) of state intervention considered in the literature to be necessary, appropriate and/or legitimate in defined areas.

The aim in answering the third set of core questions was to identify the extent to which policy is intended to affect behaviour and the extent to which policy measures are said to determine or influence behaviour.

The information collected using this approach was used to contextualize the statistical and interview materials assembled in subsequent stages of the project.

Elite interviews

The empirical work carried out in the 11 countries participating in the IPROSEC project involved the collection of new data using elite interviews with political, economic and civil society actors. In the first stage of the project, key informants were selected from policy actors at national and local level, including government officials, representatives of employers, trade unions, service providers and NGOs.

The interviews were designed to identify how the challenges arising as a result of the socio-demographic changes observed at national level are perceived in different policy contexts, and to assess how policy actors are engaging with issues concerning family change. A list of core questions was drawn up in consultation with the project partners, covering policy formulation and implementation in areas concerned with changing family structure, gender and intergenerational issues. The interviews were conducted by the partners and research assistants in 2000–01, as recorded in Table 1.

Table 1 Elite interviewees

	FR	DE	EL	IRL	IT	ES	SE	UK	EE	HU	PL	Total
Political	12	7	14	4	6	3	6	4	5	5	5	71
Economic	5	7	6	3	6	5	4	12	4	4	7	63
Civil society	2	6	11	2	5	3	1	7	6	4	7	54
Total	19	20	31	9	17	11	11	23	15	13	19	188

Questions were asked about the involvement of the different categories of actors in policy formulation, the monitoring of the family impact of policies implemented in other areas, perceptions of the influence of the EU on national policy and evidence of any attempt at policy learning from other nation states. Political actors were questioned, more specifically, about the extent to which they felt governments should intervene in response to changes in family structure, whether government policies have had much impact on family life (deliberately or unintentionally), whether governments take into account the family impact of broader social and economic policies, and whether they should target particular family forms. Economic actors were asked about the extent to which the family has become an important factor in employment policy and practices over the last ten years, about equal opportunities and working time arrangements, whether the family commitments of employees should be a concern at the workplace, and whether governments do/should intervene in business to support the family life of employees. Civil society actors were questioned about their involvement in family issues and the family policy process and co-ordination between family policy actors.

Each national team drew up their own report and supplied it to the Co-ordinating Team. The reports were made available to all the participants in the project on CD-Rom. Consolidated findings across the three

sectors were presented in *Cross-National Research Papers*, 6 (3) *Comparing Family Policy Actors* (2002) (Deliverable n° 7.3.1.4).

Surveys and in-depth interviews

In the second stage of the project, small-scale postal, telephone or self-completion questionnaire surveys were carried out in each of the 11 countries. The survey aimed to capture men and women in roughly equal numbers, aged from between 25 to over retirement age (with a concentration in the 35 to 55 age range), and belonging to high, middle and lower socio-economic categories (on the basis of education, employment and income). Respondents were sought with experience of different living arrangements, covering marriage and parenting, unmarried cohabitation and parenting, lone parenthood, divorce or separation and parenting, family reconstitution and parenting, same-sex cohabitation, living alone, multigenerational living.

The survey had two objectives: firstly, the questions were designed to explore the knowledge and perceptions respondents had of public policy and its impact on decisions taken about family and working life; secondly, the survey was intended to act as a filter for selecting respondents for follow-up in-depth interviews.

A common questionnaire guide was prepared by the Co-ordinating Team in consultation with the partners. It was recognized that not all questions would be appropriate for all countries. Exactly how the questions were worded depended on the context of the interviews and national sensitivities.

In view of the constraints of time and resources and the diversity of local situations, partners were left to determine the most appropriate sampling techniques and form of delivering. The results were not, therefore, directly comparable, either in terms of methods or coverage, as indicated in Table 2. In conjunction with national survey data, however, they provided a useful background for the in-depth interviews and analysis. The survey was conducted in the second half of 2001.

Table 2 Small-scale surveys respondents

	FR	DE	EL	IRL	IT	ES	SE	UK	EE	HU	PL	Total
Method	*	Tel	SC	SC	P	Mult	P	Tel	SC	SC	P	
No of cases	*	282	204	204	238	281	672	381	262	251	250	3025

Legend: * national surveys; P postal; Tel telephone; SC self-completion face-to-face; Mult multiple methods.

Each national team analysed their own results and provided national reports, which were made available to project team members on CD-Rom. The reports covered knowledge and awareness of policy measures (or lack of them) that might affect family life; access and take-up of benefits and services provided by the state, employers and the voluntary sector; attitudes towards the legitimacy and social acceptability of state and other intervention (degrees of acceptability of different forms of intervention and limits) in family life and perceptions of the responsibility of families for the well-being of their members.

For the in-depth interviews, a semi-structured questionnaire framework was prepared and agreed by the project partners, who made adaptations to suit national contexts. The interviews took between 30 minutes and one hour. An attempt was made to interview men and women in roughly equal numbers and to cover the range of situations identified in the survey. Where suitable respondents had not been identified in the survey, snowballing was used. Table 3 lists the number of interviews conducted with men and women in each country.

Table 3 In-depth interview respondents

	FR	DE	EL	IRL	IT	ES	SE	UK	EE	HU	PL	Total
No of men	8	6	18	20	15	20	13	20	19	29	20	188
No of women	33	19	32	30	30	32	15	20	15	21	30	277
Total	41	25	50	50	45	52	28	40	34	50	50	465

The questions were designed to explore, firstly, how decisions are taken about family life (decision-making process), covering living arrangements, family formation (marriage, divorce, parenting, timing and number of births), gender relations at work and in the home, and intergenerational responsibilities. Secondly, respondents were questioned about perceptions of the relationship between family life and policy, the extent to which they take account of policy in planning and organizing family life, and about the relative importance of policy in relation to other factors impinging on family life decisions.

Interviews were recorded with the permission of the respondents. The Co-ordinating Team did not request a full transcript of the interviews but asked for reports on the interviews, following a common structure, and including appropriate quotes. The reports concentrated in the impacts of policy (state and other intervention) on family life; the relationship between policy, family history and employment history; the relative importance of policy measures in relation to other factors shaping family life; and ways in which families could become more effective policy actors themselves. The reports were made available to all the project partners on CD-Rom.

The Co-ordinating Team carried out the comparative analysis and fed the results into its consolidated reports. Research assistants in each of the participating countries were invited to produce papers drawing together the findings from the different stages of the research for publication in *Cross-National Research Papers*, 6 (6) *European Case Studies in Family Change and Policy Practice* (2003) (Deliverable n° 7.3.1.7).

Policy learning case studies

In the final stage of the project, partners were asked to prepare case studies of the policy learning process in practice. Fourteen policy learning case studies were presented at the project's dissemination conference in Loughborough, UK, in April 2003 (Deliverable n° 7.3.1.9).

Each case study addressed the following questions:

Why was the policy needed?

Where did policy makers look for examples of good practice?

What adaptations did they need to make?

How was the policy organized, funded and delivered?

Did the policy work (achieve the desired outcome)?

Why did the policy work (or not)?

What lessons can be drawn about the experience for cross-border transfer?

What could other countries learn from this experience?

How would it need to be adapted?

The policy measures selected covered the four themes of the project:

1. Population Decline and Ageing

Care Benefit for Older People in Poland – Wielisława Warzywoda-Kruszynska with Lucyna Prorok-Mamińska

Pension Reform in Greece – Dimitra Taki and Spyridon Tryfonas

2. Changing Family Structure

Conflicting Family Support in Hungary – Mária Neményi

Universal Child Benefit in Estonia – Dagmar Kutsar

The Reduction of Working Time and Family Life in France – Marie-Thérèse Letablier

3a. Changing Gender Relations from an Employment Perspective

Counselling centres for women's employment and social integration in Greece – Maria Stratigaki

Employment Protection for Mothers in Estonia – Kati Karelson

The Business Case for Women's Labour Force Participation and the Family-friendly Workplace in Germany – Dieter Eißel

3b. Changing Gender Relations and Equality Issues

Urban Time Policies in Italy – Alisa Del Re and Valentina Longo

Incentives for Men to Take Parental Leave in Sweden – Olga Niméus

Contracts for Same-sex Couples in Hungary – Judit Takács

4. Changing Intergenerational Relations

Pension Reform and Flexible Retirement Age in Sweden – Ingrid Jönsson

Elder Care Allowance, allocation personnalisée autonomie, in France – Sophie Pennec

The Homeshare Programme ‘Viure i Convivre – Vive y Convive’ in Spain – Mònica Badia i Ibañez

Methods training

Although the partners in the project were selected for their knowledge and experience of conducting cross-national research and operating in international teams, an important objective of the project was to contribute to the training of less experienced researchers. Most of the research assistants involved in the project had not previously been involved in multinational European projects. The three annual workshops, therefore, included a training dimension.

At the first workshop, three papers were presented on cross-national research methods, by Linda Hantrais (theory, methods and practice), Louise Appleton (spatial dimensions) and Anthony Abela (attitudinal data collection and analysis). Discussion took place about the framework for the elite interviews, led by Paul Byrne and Peter Ackers. East/West comparative issues were presented by Jerzy Krzyszkowski, Dagmar Kutsar and Mária Neményi, and breakout sessions were arranged to examine concepts and contexts, and qualitative and quantitative approaches to data collection and analysis (see Deliverables n° 7.3.1.2–3).

At the second workshop, Sophie Pennec presented a paper about the comparability of data and survey populations, Tess Kay addressed issues concerned with the survey methods and questions, Mária Neményi talked about family interviews, Dagmar Kutsar about focus groups and Rachel Hetherington about the vignette technique. Breakout groups analysed the reports on the elite interviews and discussed the design of the survey and interview questions.

At the final workshop, Louise Appleton and Judit Takács reported on an end-user dialogue group meeting in Hungary. The research assistants were asked to compare the findings from the survey and interviews in their country with those from one other country, while the partners presented a cross-national overview of the findings on specific themes: factors encouraging or inhibiting the achievement of ideal family size and composition (Dagmar Kutsar); reasons for family transitions (Mária Neményi); perceptions of family members' responsibilities and obligations towards relatives (Ingrid Jönsson); attitudes towards the legitimacy and acceptability of policy intervention in different areas of family life (Dieter Eißel); and the impacts of policy on family events and transitions (Wielisława-Warzywoda-Kruszynska). The intention was to enable the researchers to compare interpretations of the material from the outsider's and insider's perspectives. The breakout groups began to address the issue of policy learning and transfer in preparation for the dissemination conference.

The research assistants were given the opportunity to undertake cross-border visits during the survey and interview phase of the projects to enable them to discuss methodological issues and sit in on interviews.

The research assistants were actively involved in the preparation and delivery of the end-user group meetings held in Hungary, Spain and Poland, and in the vignette held in the UK, and they participated in most of the cross-border visits undertaken by the partners.

The research assistants were given the opportunity to publish their national findings in English in the *Cross-National Research Papers* series (see Deliverables n° 7.3.1.3, 5, 6, 7). They received considerable support in doing so from members of the Co-ordinating Team, who saw this as a way of helping them develop their research skills, particularly in cases where a publication was a requirement for registration for a higher degree by research.

3.3 OVERVIEW OF PROJECT RESULTS

The papers in the seven issues in the sixth series of *Cross-National Research Papers* (Deliverables n° 7.3.1.2–8) edited by members of the project team, have drawn together contributions, including invited papers, on topics relevant to the various stages in the research. They have reported interim findings from the project and examined theoretical, methodological and substantive questions raised in the course of the research. This overview highlights some of the more salient findings that are of interest for their relevance to both the conduct of the research and policy development. Sections 3.3.1–7 provide an overview of the findings produced during the early stages of the project, while Sections 3.4–8 present the more detailed consolidated findings from the totality of the project (excluding the figures and quotations presented in the published report, Deliverable n° 7.3.1.8).

3.3.1 Conceptualizing and measuring families and family policies in Europe

The first issue in the sixth series of *Cross-National Research Papers* examined some of the methodological questions raised in the first stage of the IPROSEC project. The papers discussed differences in social constructions of the key concepts used in the project, as well as problems of ensuring comparability when measuring socio-demographic change across EU member and applicant states.

The first paper located the research in relation to the wider context of cross-national theory, methods and practice. It reviewed critically the methodological choices that had to be made by the project team and their possible implications for the findings from the project. Members of the research team were aware that any similarities or differences revealed by the study may be no more than an artifact of the choice of countries. They also cautioned against drawing out generalizations from a limited number of cases or attributing seemingly similar outcomes to the same causes. The IPROSEC project, therefore, adopted a multimethods approach to enable the findings to be validated. The paper concluded that, if recurring patterns of phenomena were found within clusters of countries, both in terms of inputs and outputs, then it might be possible to justify extrapolation of policy practices between countries that have undergone similar policy processes, and to determine under what conditions the policy solutions adopted in one country could be transferred elsewhere.

The second paper examined issues concerned with conceptual equivalence in different societal and linguistic settings, taking account of the ways in which context-specific traditions contribute to the social construction of phenomena. The project was interested in identifying indicators of societal coherence by studying the relationship between social phenomena and their socio-cultural settings. A number of the key concepts selected to exemplify societal differentiation, particularly between the member and applicant states represented in the project, were discussed: biological ageing, lifelong learning, parenting skills, intergenerational solidarity, welfare dependency, informal economy, labour market concentration and segregation, reconciliation of paid and unpaid work, distribution of household labour and individualization of social rights. It was noted that, although Eurostat uses internationally agreed definitions of social indicators, the data it collates and harmonizes are collected at national level. They are, therefore, dependent on national statistical tools, traditions and practices, which means that they must be interpreted in relation to the socio-economic and political contexts in which they are socially constructed.

The third paper looked at the definitions of some of the more problematic indicators used in the project to track family change. Issues of measurement and comparability were discussed, with reference to data availability and consistency over time (within countries) and space (across countries). The indicators selected for analysis were grouped around the topics that were central to the themes of the project: family forms, fertility, population ageing and aspects of labour market activity and inactivity that impinge on family life. The analysis highlighted the problems that the research team was facing in establishing a database using European data sources, particularly with regard to the candidate countries. It also identified the importance of tracking family change at subnational level if the reality of family formation and structure are to be properly understood.

The final paper explored national interpretations of the place of the family in the relationship between the public and private spheres in the EU member states and candidate countries included in the project. From a comparative perspective, it examined the extent to which family policy is legitimized institutionally, for

example through references in a country's constitution, by falling within the remit of a designated government department and by being identified in law and practice as a specific policy domain. The paper began the task of characterizing family policy in the countries under study. From the information examined, France stood out as the country with the most explicit and coherent official family policy, while Sweden had adopted a more individualistic approach, emphasizing gender equality and the interests of children. Hungary was found to have retained its attachment to an explicit family policy, narrowly based on a normative definition of the family, which confines women within the home. Germany recognized the legitimacy of government involvement in family affairs, but with the conjugal relationship as the centrepiece of policy. After transition, Poland had maintained its focus on support for the traditional family values underpinning society. As in the case of Hungary, in Estonia, the third candidate country, financial imperatives were limiting the development of a coherent family policy. In the United Kingdom, the hands-off approach was giving way to greater acceptance of political intervention in family life. By contrast, in the southern European countries and Ireland, the state was shown to impose formal mutual obligations on family members, while expecting them to manage their affairs with only minimal support from public policy.

3.3.2 Spatio-temporal dimensions of economic and social change in Europe

The aim of the second issue of papers in the series was to highlight spatio-temporal differences both within and between nations, and to examine the challenges they pose for cross-national research teams, and for policy formulation and implementation. In the first paper, Louise Appleton considered general theoretical and methodological questions associated with spatio-temporal diversity for researchers engaged in cross-national comparative research. She concluded that space and time are crucial factors in understanding socio-demographic change and in policy formulation since decisions taken at EU level have to be operationalized in very different socio-cultural settings, which in turn affects their efficacy. Similarly, within-country variations and changes over time, not least in political representation, determine policy diffusion and assimilation.

The other contributions in this issue of papers were organized according to their geographical level of enquiry, starting with discussion of continental scale, moving through the national and regional levels to subnational diversity and the local level. In the second paper, Alec Hargreaves concentrated on continental scale ethnic diversity and its implications for understanding socio-demographic trends, and for formulating and implementing policies. He argued that obtaining formal citizenship is only a first stage in the process of effective social participation, which remains a major challenge for public policy.

The third paper by Tess Kay was concerned with continental scale differences with regard to gender differentiation in employment patterns related to levels of education. In drawing out the policy implications, she demonstrated that greater disparities are often found between different groups of women according to their level of educational attainment than between men and women. She therefore stressed the need for policies combating social exclusion to concentrate on poorly educated mothers and recommended the adoption of a lifetime perspective in policy formulation and an integrated approach in social policy responses.

In their paper, Dagmar Kutsar and Ene-Margit Tiit examined the problems inherent in comparative analysis of socio-demographic indicators between developed and transition countries, using the example of Estonia to illustrate the difficulty of achieving comparability over time within transition countries. They concluded that greater uniformity and comparability of indicators would make it easier to identify uniqueness.

In the first of two papers concerned with regional diversity, Dieter Eißel and Jeremy Leaman compared the two Germanys (East and West), and the impact of economic, political and social upheaval associated with unification based on the federal system. They took the case of public childcare provision to illustrate the disparities between the two systems and warned against drawing generalized conclusions about social attitudes and state policy formulation. In his paper, Devi Sacchetto considered the north/south divide in Italy in terms of economic, social, cultural and political factors, the effect it has on national demographic trends, and the implications for collecting and analysing national statistical data, and for formulating and implementing policy. He also concluded that universal solutions are not appropriate for what appear, on the surface, to be identical problems. Nor, he argued, has fiscal devolution provided a satisfactory answer,

precisely because the regions most in need of policy intervention receive more limited funds and lack the administrative structures necessary to ensure effective policy delivery.

In her paper, Ágnes Kende focused on within-nation ethnic diversity. She contrasted the Gypsy and non-Gypsy populations in Hungary, highlighting the problems of defining and measuring the Roma presence in the 1990s. She underlined the fact that poverty in Hungary is 'ethnicized', which means that the problems faced by Gypsies are not part of mainstream social policy, which raises important questions about social rights and equity for minorities.

The theme of rural versus urban differences was addressed by Wielisława Warzywoda-Kruszyska and Jerzy Krzyszkowski with reference to Poland. The authors discussed the problems of declining fertility rates and increasing population ageing from both spatial and temporal perspectives, highlighting the deterioration of the situation in rural areas. They concluded that the mainly restrictive policy measures put in place to stem population decline and offset the negative impact of population ageing have not prevented rural poverty from intensifying. In the absence of supportive public policy measures, older people are being forced to rely more heavily on their family members in a context where family solidarity is being severely tested.

The final paper by Maurice FitzGerald examined the implications for social life of the phenomenal economic growth that has taken place in Ireland since it joined the EU. The author argued that the benefits of economic growth have not been evenly distributed between rural and urban areas, social categories and women and men. He suggested that the changes, and particularly the speed with which they have occurred, have created important challenges for both policy formulation and implementation.

3.3.3 Comparing family policy actors

The papers in the third issue in the series reported on the findings from the elite interviews with political, economic and civil society actors in the IPROSEC project countries. The interviews were designed to investigate the policy process and develop a greater understanding of national policy responses to socio-demographic change. The authors compared the involvement of different actors in family policy and analysed their accounts of how policy is formulated and implemented in different national contexts.

In his discussion of political actors, Paul Byrne acknowledged the impact of party politics on policy development. Legitimacy of state intervention in family life and policy focus were presented as possible explanations for cross-national variations. Despite the overall diversity between countries, he identified two common strands with respect to family policy: competing ideologies and national policy styles. Across the IPROSEC countries, virtually all parties of the right advocate the traditional family model as the cornerstone of a stable society, particularly where the Catholic Church is strongly entrenched. They support universalistic approaches to family welfare. Parties of the left are more likely to prioritize issues of work-life balance and gender equality, a targeted approach to benefits and support for de-institutionalized family forms, even though conventional family units are perceived as a useful way of transferring some of the welfare burden away from the state. Despite similarities, in terms of policy styles, in the perception that political actors have of the inadequacy of policy co-ordination, only in very few cases could policy thinking be said to be joined-up. The conclusion to the paper noted a wide consensus among political actors that family policy can be an important instrument for achieving other policy objectives, including social cohesion and the rolling back of the state as a major funder of welfare.

Peter Ackers' paper on economic actors assessed the contributions made by employers' representatives and trade unions to family policy. Although substantial numbers of women were employed in all IPROSEC countries, national approaches were found to be ranged along a continuum between those where gender and employment policies are regarded as separate spheres (southern Europe), those where linking policies are emerging (Germany and the United Kingdom) and those where substantial integration already exists (France and Sweden). Major differences in workplace attitudes and approaches to family policy across and within countries were attributed to welfare policies, the perceived legitimacy of intervention in family life, changing family structures and gender roles, the policy environment and employer relations at national and workplace levels. Ackers argued that the business case for harnessing human resources through family-friendly policies only works for the more skilled and highly educated categories of employees in full-time protected employment, and that state-initiated social regulation is needed to generalize and institutionalize such

policies and to encourage employers to take a broader view of their employees' family responsibilities. In conclusion, he cautioned against over-regulation, particularly of working and opening hours, which merely served to reinforce gender segregation by denying women access to the labour market, and he warned against flexibility purely on employers' terms, which reinforced insecurity for men, women and their families.

Louise Appleton's paper considered national variations in the roles played by the civil society sector in the family policy process and related them to social perceptions of the legitimacy of policy intervention in family life, the competing or complementary roles of the economic and political sectors, and the functions of not-for-profit organizations as lobbyists or specialists in policy implementation and service delivery. Despite the great diversity within and between countries of civil society organizations in the area of family policy, several patterns were identified among the IPROSEC countries. At one end of the spectrum is France, with its active and well integrated civil society sector working in partnership with the state in the policy process. At the other, are the candidate and southern European countries, where the sector is less well developed and less influential, with the significant exception of the powerful, though declining, role played by the Catholic Church.

The concluding paper, also by Louise Appleton, identified two main policy network models among the countries in the project. The first is integrated, with close co-operation between policy actors, although only in France are the roles of policy actors fully harmonized. In the second model, the three sectors are perceived as separate entities with distinct family policy agendas, minimum co-operation and varying degrees of segregation. As in the analysis of the civil society sector, most countries fall between the extremes. France and Sweden can be characterized as having the most comprehensive approach to policy integration. Germany, Ireland, Italy, the United Kingdom and Poland have a partially integrated arrangement. Spain and Greece are minimalist in their approach and come closer to the segregated model, while Estonia and Hungary are aspiring to shift towards a more integrated approach.

3.3.4 The employment relationship and family life

The papers in the fourth issue in the series, edited by Peter Ackers, analysed the relationship between employment and family life. The introduction showed how, through their power to regulate employment policy and working conditions, EU and national institutions impact on the everyday lives of families. Government intervention to reconcile paid work and family life was taken as an example of how indirect employment levers affect the quality of family life and legitimate further state intervention.

In his contribution, Devi Sacchetto analysed the new forms of labour contract in Italy associated with flexibility and employability. He argued that they are bringing about a more 'economic' attitude to relationships within families, whereby family life is treated as an industrial process. The capacity of the Italian family to adapt to different situations was found to be in a state of crisis. The rigidity of family life in terms of economic needs and care duties contrasts with the total availability demanded of workers in the employment relationship and forms of flexibility on employers' terms.

In the second paper, Mònica Badia i Ibàñez described the more heterogeneous model of the family emerging in Spanish society and the self-help strategies parents are adopting to combine work and household life. The lack of effective public policies was found to be reinforcing reliance on the male breadwinner and family solidarity. Kait Kabun's findings in Estonia were not dissimilar. He explored women's changing role in paid and unpaid work as Estonia made the rapid transition from Soviet-style socialism to Western capitalism, and prepared to join the European Union. He was interested in the reasons for the relative shortage of public intervention as well as the unwillingness among employers to deal with the reconciliation issue more actively. He identified the rise in unemployment, poverty and social exclusion as the most pressing concerns for government. Employers, he argued, seem to be unaware of equality issues and reconciliation strategies. Although family-friendly company schemes are being promoted, employers have yet to be persuaded by the business case for supporting work-life balance.

Two of the papers focused on British employment policies under New Labour. Peter Ackers maintained that the Blair government has substantially changed the legal and institutional framework of British employment relations, while also helping to shape employer and trade union initiatives in the direction of social partnership and family-friendly policies. He concluded that family-friendly workplace policies remain

tenuous. In the past, many of them were introduced during a period of economic boom and abandoned when the economy went into recession. The regulatory framework used by the Blair government to bring in statutory employment rights continues to encounter opposition. Although family-friendly policies are not yet deeply embedded in British workplace culture, they are found to have gained a social momentum due to the growing labour market activity of women that it would be difficult to hold in check. Elizabeth Such was more sceptical about New Labour's record. Illustrating her case by reference to dual-earner couples and the difficulties they experience in reconciling work and family responsibilities, she pointed out that, although Labour has brought childcare and parental leave back onto the policy agenda, the lingering conception of the family as a private affair has kept its provisions to a minimum.

Roberta Guerrina's concluding paper provided an overview of EU family-friendly policies and assessed the assumptions the Commission makes about family structures, gender roles and the employment relationship. She asked whether, in the context of the expanded role of the social partners and the changing balance between hard and soft law, a new employment model is emerging in Europe, or whether the relationship is converging towards an established model. Her analysis underlined the significant differences between countries in the application of the principles enshrined in EU regulations. She argued that the regulatory framework continues to provide an important reference point for employers and employees and has strengthened the position of women in European societies, thereby encouraging the development of a more inclusive work culture. In conclusion, she advocated a multidimensional approach to work-life balance policy, addressing both economic and equality issues.

3.3.5 Changing family structure in europe: new challenges for public policy

This fifth issue of *Cross-National Research Papers* was devoted to comparisons of changing family structures in the IPROSEC countries. The six papers examined different aspects of family change in recent decades with reference not only to family structure but also to value systems.

The first paper by Marie-Thérèse Letablier and Sophie Pennec used data collected for the IPROSEC project, supplemented by information from national sources, to provide an overview of changing household and family structures and related gender issues. The paper showed that, although change has been occurring in all the countries in the project, it has not had the same impact everywhere, resulting in different challenges for national governments. The authors identified the main challenge for policy as the organization of support for families to help them reconcile work and family life through a much greater diversity of services and benefits.

In his paper, Anthony Abela analysed family values, the cultural specificity of patterns of value orientations and related options for social policies in the IPROSEC countries, using the 1999–2000 European Values Study. He highlighted gender issues and the changing meaning of marriage and identified political profiles and attitudes towards social policy orientations. The findings showed a significant relationship between post-traditionalism, political ideologies and most social policy issues. The study pointed to a weakening of the traditional left–right political divide and the corresponding options in social welfare at individual level in favour of 'third way' politics and an increasingly complex multicultural, post-materialist and post-traditional European welfare society.

The other papers in the collection focused on specific aspects of socio-economic trends, mainly associated with patterns of fertility, in an attempt to track the disparities between demographic change, perceptions and attitudes towards family policies, and their possible impact on social practices. The paper by Kati Karelson, Valentina Longo, Olga Niméus and Jutta Träger compared the impact of public policies on family formation in four countries: Estonia, Germany, Italy and Sweden. The authors combined quantitative and qualitative approaches, drawing on national data and interviews carried out for the IPROSEC project to bring together information about trends in fertility and female economic activity with the perceptions and attitudes expressed by individuals. They examined how families perceive incentives and obstacles with regard to family formation decisions, and looked at the possible impact of social and family policy measures on family decisions about fertility and family life. They found differences not only in the timing and pace of change but also in its direction. Whereas completed fertility levels in Estonia and Sweden have remained relatively stable, they have fallen more steeply in Italy and West Germany. While women in Sweden are well supported by public policy and display high employment rates, in Germany and Italy, female employment is

rising more slowly and, in Estonia, the rate fell sharply during the 1990s from a previously much higher level, in a context of withdrawal of public support for working mothers. The barriers to women's employment were cited as a possible explanation for the reluctance of couples in the latter three countries to embark on family formation.

Three of the papers presented single country case studies. That by Ingrid Jönsson dealt, in greater depth, with fertility changes during the twentieth century in Sweden and the resulting challenges for family policies. She examined the development of modern family policy as well as gender and labour market policies, scrutinizing fertility trends in relation to family policies during different historical periods. Jönsson showed that not only are fertility decisions in Sweden determined by family policies, but they are also closely interrelated with a set of environmental parameters, including the labour market situation, gender relations and the family-friendliness of the social context.

The paper by Dagmar Kutsar and Ene-Margit Tiit provided an overview of changes in family structure at the beginning of the twenty-first century in Estonia, with a focus on unmarried cohabitation and policy responses to it. Since the 1990s, pre-marital cohabitation has increased dramatically in Estonia and is now a widespread living arrangement, as in the Scandinavian countries. In 2000, 55% of children were born out of wedlock. As in the Swedish paper, the two authors were interested in the decision-making process with regard to living arrangement, and used results from a longitudinal survey of students' attitudes in combination with qualitative data collected for the IPROSEC research to analyse trends. They found that, during the 1990s, whereas no radical change was observed in students' value orientations, gender remained an important factor explaining preferences in living arrangements, with women opting for more conventional family forms.

The final paper by Mária Neményi and Olga Tóth explored the contradictions between demographic data, attitudes and values concerning families in Hungary. They found that, although radical changes have occurred in lifestyles and family life, family structures and gender roles have changed very slowly and tend to remain traditional. The Hungarian process of modernization since the 1990s has not led to a fundamental shift: conservative values are still prevalent, except among the younger generations. The authors concluded that values change more slowly than demographic behaviour. They noted that, in the 1970s and 80s, individual and collective ideology had moved closer to societal expectations, but the 1990s brought a reversal and reinforced divisions within society, impeding the modernization process.

3.3.6 European case studies in family change and policy practice

All the papers in the sixth issue in the series, written by the national research assistants in the participating countries, attempted to track changing family structure, with a view to identifying the challenges being faced by policy actors, their responses, and the experiences and perceptions of families themselves. Each of the country case studies drew together the findings from the different stages in the IPROSEC project.

The first paper presented the situation in France, where family policy is well established on the policy agenda, and where a close partnership exists between policy actors. Addressing the four project themes of population decline and ageing, changing family structures, gender and intergenerational relations, Olivier Büttner found that, in all cases, the French state and electorate are aware of the need for policy and recognize the legitimacy of intervention by the state. Building on this consensus, policy has been adapted in response to changing socio-demographic trends. While the normative family has become less rigidly defined, families have been given greater choice as to how they organize their lives, with support from publicly provided services. The state has, thereby, become the facilitator of choice. Despite the long tradition and strong consensus between policy actors over the responsibility of the state towards families, the author concluded that parties from the right and left continue to differ in their views about the forms family support should take.

The second paper also illustrated the close relationship between policy actors in the formulation of family policies and the acceptance among Swedish families of increased state intervention in certain areas of family life. Olga Niméus focused on the first three themes of the project, illustrating the link between population decline and ageing, changing family forms and changing gender relations associated with women's greater participation in the workforce. She demonstrated how extensive public policy, especially the provision of public services such as childcare, has been adapted to the changing needs of families, facilitating, among

other things, the balance between work and family life. She found that, despite extensive state support for reconciliation and gender equality, the workplace remains gender segregated, and women continue to carry the main responsibility for caring. Consensus appears to be less strong than in France among policy actors about the extent to which the state should intervene in family life.

The third paper, which reported on the situation of families and family policies in the United Kingdom, illustrated the gradual shift towards greater acceptance of state intervention in family life and the development of partnerships between policy actors. Elizabeth Monaghan, Elizabeth Such and Moira Ackers focused on the two themes of population decline and ageing, and changing family structure, arguing that such issues have been addressed by a more 'hands-on' policy approach since the late 1990s, with the introduction of explicit policies to encourage women into work, to institute parental leave and to regulate working time. The aim of policy is to tackle child poverty and social exclusion, and to strengthen communities by obliging families to meet their responsibilities. Paradoxically, while the state has intervened more directly than before in family life, its policies have been designed to increase rather than replace the responsibilities of families towards their members. The researchers found that families expect public services to play a greater, though not an intrusive, role in assisting them in their daily lives.

In her analysis of the German case, Jutta Träger focused on the themes of population decline and ageing, and changing gender relations, identifying the need for state intervention in response to the decline in fertility and low female economic activity rates. While the right and the left are divided in their responses to these issues between the stay-at-home mother and the working mother with children in day care, family members were found to be calling for greater intervention to support them in their desire to have children. They are demanding the improvement of living conditions and infrastructures to assist with the care, education and financial costs of raising children. German families are seeking a holistic approach to family life, aware that single policies fail to meet all their needs. Disagreement was revealed, however, over who should provide that assistance. As in the United Kingdom, the state has delegated responsibility to families and civil society. While families continue to reject state interference in what they see as private decisions, they expect the state to work with civil society to guarantee a safety net for families at risk.

The paper on Ireland also illustrated the ambivalence of attitudes in Irish society regarding socio-economic change and policy responses. Julia Griggs examined the four project themes, contending that, while the impact of population decline and ageing, and changing intergenerational relations is not yet being felt to the same extent in Ireland as elsewhere in Europe, policies have already been implemented to help cope with the problems that are likely to arise in the future, demonstrating that Ireland has learnt from the experience of other EU member states. At the same time, Irish governments have been more cautious in addressing issues arising from changes in family structure and gender relations, largely due to the influence of conservatism, which was enshrined in the 1937 Constitution and is being sustained by the Catholic Church. Change is also being impeded by the reluctance of families to see the state interfere in family life. They are, in addition, less willing than in the past to accept intervention from the Catholic Church as a civil society actor.

The Estonian paper pursued the theme of the shift in responsibility for family well-being from the state to families themselves, in a context where economic restructuring and the withdrawal of the state, following the collapse of Soviet rule, have provoked a return to traditional family values, self-reliance and mutual aid, both horizontally and vertically. Kati Karelson and Katre Pall argued that transition has provided a stimulus for family empowerment and an opportunity for civil society to assume a more proactive role. However, distrust of the state extends to non-governmental organizations, with the result that families continue to rely most heavily on their own members not only in coping with adversity but also in managing everyday life.

The paper by Judit Takács again highlighted the increasing heterogeneity of family forms, in this case in Hungary, and found policy was lagging behind the new living arrangements of families. As in the other Central and East European countries, Hungary has witnessed the collapse of the state, and it is families, rather than private or civil society organizations, that are taking on responsibility for family care. While Hungarian families are more accepting of this role, they see the need for holistic policy intervention to address the many factors contributing to the combined causes and effects of declining fertility rates, including women's employment.

In Poland, the third candidate country in the project, the experience of transition has brought into sharp focus the many paradoxes facing policy actors. In their paper, Małgorzata Potoczna and Lucyna Prorok-Maminska

identified the need for greater support for families to offset the effects of population decline and ageing, but they found that economic restructuring and the associated withdrawal of state and employer intervention in family life have removed vital resources from family policy. Women have been the main losers, as high unemployment and inadequate welfare support have provoked a return to the legacy of traditional conservative values buttressing the male breadwinner model. Rather than seeking explicit family-friendly policies, families are demanding the provision of job opportunities and of more effective public services, including education and health care, which are expected to create more favourable conditions for work–life balance and lead to families being able to turn their attention to family building.

The reliance on family support networks was also a strong focus in the three papers on Spain, Italy and Greece, but, because of the changing roles of women, families feel less able to fulfill these duties and are calling for more state support. In her paper, Mònica Badia i Ibáñez argued that, as women in Spain have been entering the labour market in larger numbers, in the absence of flexible working hours and part-time contracts, the burden for child and elder care is more difficult to manage. However, the underdevelopment of the welfare state in Spain is preventing the implementation of policies that might assist families and, more especially, women.

Valentina Longo and Devi Sacchetto presented a similar case in the Italian context. They argued that, despite the changes in family life that occurred over the last decade of the twentieth century, policy appears to have stagnated and, in some cases, has become inaccessible to many families because of high costs. Focusing on the first two themes of population decline and ageing, and changing family forms, they emphasized the geographical diversity in socio-demographic change and the need for it to be addressed by policy. In particular, they highlighted differences between the north and centre-north of Italy and the south, arguing that, while socio-demographic change throughout the 1990s is most apparent in the southern regions of Italy, the conservative values intrinsic to the local and regional policy environment render them inflexible. Where fertility rates and family forms have changed in the north and centre-north, policies are, however, being implemented to some extent at the municipal level to deal with the challenges raised. In contrast to Spain, however, respondents in Italy are more deeply committed to the idea that the family should take care of itself, arguing that the state should help by making services more accessible in terms of cost, and of geographical coverage and provision.

The final paper on Greece also made the case that socio-demographic change has brought about a situation in which families are less able to carry the burden of family responsibilities than in the past. However, to a greater extent than in Spain and Italy, according to Dimitra Taki and Spyridon Tryfonas, while the need for state intervention is recognized, families are reluctant to allow the state to intervene, not only because it may threaten the family networks that provide the social safety net in Greek society, but also because many people do not trust the state to look after the family. The paper explored this ambivalence and the search for a compromise between family solidarity and extrafamilial support. The preference expressed by families was decidedly for additional benefits rather than services to enable families to choose their own forms of support without interference from the state.

3.3.7 Comparing family change and policy responses

Most of the contributions in the issues 1–6 of papers in the sixth series of *Cross-National Research Papers* focused on individual countries or have compared the findings from a specific stage of the project across countries. In the final issue in the series, a comparative analysis was made of the materials collected throughout the project across the 11 participating countries. The issue was structured thematically. The second paper looked at the family policy process drawing on the policy context analysis carried out in the first stage of the project and the interviews with the elite policy actors. It examined public perceptions of family policy, as reported in the surveys and interviews and the effect of public policy decisions on family life.

The four following papers addressed, in turn, each of the main themes that structured the project: population decline and ageing, changing family forms, changing gender and intergenerational relations. For each theme, an analysis was made of the data collected on socio-economic trends and associated issues that are already, or are expected to become, of concern for policy practitioners, together with the challenges they present. Current and projected policy responses were explored, covering the formulation and implementation of

prohibitive, permissive, pre-emptive and proactive policy measures, followed by an analysis of the imputed outcomes of policies in terms of their perceived impacts on family life, and concluding with a review of proposals for further policy development.

The final paper focused on policy learning and development, weaving together the findings from the materials collected throughout the project and drawing on the series of national case studies, in which members of the project team commented on the policy issues and challenges being addressed by specific policy measures, and looked at the potential for policy transfer. The paper highlighted the diversity in the pace and intensity of socio-economic change and in approaches to family policy, before going on to examine the circumstances under which policy transfer takes place at European and national level, and the conditions under which it is most likely to be effective. The paper concluded by reflecting on the lessons that can be drawn from the research about ways of improving the efficacy of policies that impact on family life. The findings from these papers are set out below. The full version, including graphs and quotations, is presented in *Cross-National Research Papers*, 6 (7) *Comparing family change and policy responses* (Deliverable n° 7.3.1.8).

3.4 ANALYSIS OF THE FAMILY POLICY PROCESS

For the purposes of the IPROSEC project, family policy was defined as a coherent set of policies that identify the family unit as the deliberate target of specific actions, and where the measures initiated are designed to have an impact on family resources and, ultimately, on family structure (Millar, 1998; Commaille *et al.*, 2002). Designated government departments are usually charged with formulating and implementing policies with this aim in mind. The project team was also interested in tracking policy measures that do not directly target families as a unit but can have an unintended impact on family life, for example labour market and employment policies or measures designed to protect children and older people, or prevent social exclusion (Dumon, 1994).

Compared to other policy areas, the research found that, in the 11 EU member and applicant states selected, family policy objectives have a relatively low status in terms of public policy priorities and the differing macro-economic or social imperatives driving policy initiatives. Family policy is often the vehicle for delivering the objectives of other policy areas – employment, demographic balance, economic growth, social cohesion or a reduction in criminality – rather than pursuing its own clearly defined set of objectives. It may perform valuable rhetorical and electoral functions but tends to disappear from the agenda when other pressures increase.

Analysis of the family policy process in the project countries, whether it be through contextual documents (legal frameworks, regulations), interviews with political, economic and civil society actors, or with families themselves, indicated important variations between countries. Differences were found in the principles underlying family policy, in the engagement of policy actors with family matters and in their approaches to policy formation and implementation, all of which help to shape policy responses to socio-economic change. These differences are examined in this section in terms of policy environments, public perceptions of the design and delivery of welfare benefits and services, and the impacts of public policy on decisions about family life.

Family policy clusters

The IPROSEC countries fall into several clusters in terms of the historical development of their family policy, its design and structure, and the vehicles used for delivery. At the one extreme, in France and Sweden, policy is highly structured and legitimated. Policy actors are strongly committed to supporting families. At the other, in the southern European and candidate countries, policy is more hesitant, lacking in coherence and under-resourced. Between the two extremes are countries, including Germany, Ireland and the United Kingdom, where the rhetoric is supportive of families, but where policy actors are often reluctant to intervene in private life.

Irrespective of the level of commitment and provision, responsibility for family policy is assigned primarily to the state rather than to economic or civil society actors. In a few instances, as in France, though still state driven, responsibility is shared more equally between all three sectors and co-ordinated so that policies are complementary. Elsewhere, co-ordination is minimal or absent, and policy tends to be fragmented and piecemeal.

EXPLICIT AND CO-ORDINATED FAMILY POLICY

France stands out as the country in the IPROSEC project where state regulation and state intervention in family life and the concept of family-centred policy are most clearly and explicitly defined and articulated. Traditionally grounded in a strong rightwing ideology that saw the family as the cornerstone of social order, patriarchy and pro-natalism, French family policy has progressively been tempered by leftwing concerns with vertical distribution, equality, social solidarity and liberal values. In Sweden, state regulation of family life is also firmly grounded and institutionalized historically, and has a long association with pro-natalism. However, Swedish family policy has been influenced to a greater extent than in France by social democratic values, and has been incorporated within labour market and gender equality policy, resulting in more individualized support for family members and pressures on men to become active fathers.

Today, both countries are characterized by their family-friendly environment, their coherent and integrated approach to policy formulation and delivery, and their strong ideological commitment to redistributive policy intervention based on social solidarity. They offer a high standard of benefits and services, providing maximum personal choice and flexibility. At the end of the twentieth century, the proportion of social protection spending devoted to family benefits was relatively high in both countries, at 9.6% in France and 10.8% in Sweden, compared to the EU average of 8.2% (European Commission, 2003, p. 186). The development of alternative family forms is not seen as a problem for society, although the de-institutionalization of family life and greater individualization in society are raising questions about the future shape and form of family policy in France, and about the balance between universal and targeted benefits and services.

In addition to differences in the logic and content underlying family policy in the two countries, they are distinguished by their welfare funding and delivery mechanisms. In France, family policy is presented and funded as a dedicated policy domain. The social security system was based traditionally on employment-related insurance contributions, administered by a multiplicity of schemes. By contrast with other areas of the social protection system, employers were the sole contributors to the family allowance fund, and family benefits and services were built upon their contributions. Funds are administered by a highly specialized agency, the Caisse nationale des allocations familiales (CNAF, National Family Allowance Fund), which has a very broad remit. Although family allowances are not paid for the first child, France is the EU member state that takes greatest account of family members in the taxation system through the family quotient, which favours high income earners with several children.

In Sweden, with a few exceptions (housing allowance is, for example, dependent on the number of children and the level of income), social benefits and services are a universal citizenship right paid for by high taxes, levied on the whole population without a dedicated family policy funding mechanism or agency, and where the family or household is not identified as the primary benefit unit.

PARTIALLY CO-ORDINATED FAMILY POLICY

Three of the IPROSEC countries can be characterized as having only partially co-ordinated and coherent family policies. In Germany, family policy has become increasingly explicit and formalized as family matters have moved up the policy agenda. Within the employment-insurance based corporatist welfare system, family policy is a distinct area of social policy, ensuring universal and generous provision of child benefit and means-tested housing and other benefits to support families in need. For example, the proportion of social protection spending on family benefits had reached almost the same level as in Sweden by the end of the twentieth century. Policy continues, though, to be narrowly focused on the conjugal relationship, as reflected in the taxation system, which supports the traditional male breadwinner model rather than working mothers. Civil society makes an important contribution to policy formulation and implementation through the churches and unions. The political, economic and civil society sectors are integrated through the taxation system, with members of churches paying a tax (*Kirchensteuer*) collected by employers.

During the 1990s, the United Kingdom shifted from a neutral, implicit or underdeveloped family policy to more supportive rhetoric, but not to the extent that society, and more specifically government, can be said to be inherently friendly towards families. The establishment of the Family Policy Unit within the Home Office suggests that family policy does not sit comfortably in any government department. The family is not identified as the income tax unit: no income tax relief is, for example, given for dependent children in the case of high-income earners. Emphasis in the welfare system has been on the public provision of universal child benefit for all children, increasingly supplemented by means-tested benefits and so-called tax credits, targeting low-income families (though with a relatively high income threshold), and supporting the transition from welfare to work and the notion of employability. The resulting expenditure on family benefits as a proportion of all social protection spending fell during the 1990s to a level below the EU average.

The traditional reluctance of the state to be seen to intervene in family matters, considered until recently as a strictly private domain, has allowed civil society to play an important role in specific well defined areas. Apart from families at risk, where state intervention has long been legitimated, family members are largely left to develop their own coping strategies through recourse to private sector provision, though with at least moral and rhetorical support from the state. Governments expect firms to be sensitive to the business case in

making arrangements to improve the work–life balance and retain older workers, while continuing to argue that over-regulation will harm business interests, an argument also used to justify opposition to European legislation that might have an impact on the private lives of families.

In Ireland, although the constitution and Catholic Church support women as homemakers, the stance of governments towards the role of women in society and towards family life has been changing rapidly. Whereas mothers, especially lone mothers, were previously discouraged from entering the labour market, they are now being actively encouraged to seek paid employment. Divorce and abortion law reform has been strongly opposed on religious and moral grounds, with divorce being ultimately legalized only in 1996. Ireland is currently in a period of transition and lacks a coherent family policy, although the family unit is targeted by the benefits system, and provision is made for alternative family forms. State benefits and services are mainly concentrated on low-income earners and families in need, but nonetheless represent the largest proportion of social protection spending on family benefits among the IPROSEC countries, reaching 13% in 2000, due primarily to the size of the young age population. The welfare mix for healthcare encourages high income groups to resort to private provision, but leaves middle income families to develop their own strategies to ensure family well-being. A review of the voluntary sector's relationship with the state has resulted in legislation to regulate charities and has provided formal guidelines covering the contribution of the community and voluntary sector to participative democracy and civil society.

TRANSITIONAL FAMILY POLICY

During the Soviet era, the universal provision of housing, child and healthcare and, more importantly, jobs, which were the precondition for receiving benefits and services, meant that families in the candidate countries did not have to rely heavily on their own resources to ensure the basic needs of their members were met. In Estonia, Hungary and Poland since transition, government support for families has been severely cut back. Child benefits have fallen well below inflation, universalistic provision has largely been replaced by means-testing and targeting, and low cost facilities for pre-school children and various workplace benefits have been curtailed. Responsibility for supporting families has shifted away from the state and employers to families themselves in a context where labour market restructuring has left many people without paid work and other resources to enable them to meet even basic needs. An underlying concern is how to rebuild national identity and ensure the survival of the nation in the face of population decline, which is lending support to pro-natalist policies designed to promote population renewal.

Although they shared the experience of socialism and of transition, and are all preparing to become members of the Union in 2004, the three candidate countries were found to differ in their approach to family matters. Despite the fact that Estonia has a minister without portfolio responsible for family affairs, and governments are driven by their rejection of the Soviet system, they lack the vision and resources necessary to enable them to develop a coherent and supportive family policy, and have fluctuated between targeting the family unit with pro-natalist measures to encourage family building and protecting individuals in need. Increasingly, the state is delegating responsibility to local government, the voluntary sector, private initiatives and families themselves.

Policy actors in Hungary and Poland emphasized the importance of traditional family values. Family policy in Hungary is more explicit, and the normative definition of the family remains strong, whereas Estonia has moved furthest away from traditional family forms. At the rhetorical level, emphasis has been on the revival of traditional moral values. In Poland, the focus of policy remains the conventional two-parent married family, and governments have pursued restrictive policies designed to uphold traditional family forms and moral values, while also providing openly pro-natalist financial incentives to encourage family building.

FRAGMENTED FAMILY POLICY

In the course of the second half of the twentieth century, the three southern European countries in the study experienced the transition from an authoritarian regime, which upheld patriarchal values, to a democracy committed to a more liberal approach towards family life. They all needed to build up their welfare systems from a low base, but have tended to do so in a piecemeal way, resulting in fragmentary coverage. Today, they have in common a relatively low level of provision of benefits and support services for families,

compared to the other EU member states in the project. Family policy is implicit and largely unco-ordinated, and the state continues to delegate the responsibility for family well-being to family members.

The social security system is fragmented along occupational lines, especially in Greece. Government spending on family policy measures is low in relation to the EU average, with households in Italy and Spain receiving very little in family-related benefits: 2.7% of social protection spending was devoted to this budget head in Spain in 2000 and 3.8% in Italy. Greece was above the EU average, but the level fell during the 1990s. Childcare provision is also poor, although nursery schooling is widely offered as part of free education, and healthcare is available in all three countries on a universal basis. Family allowances are means-tested in Italy and Spain. In the absence of social assistance in Greece, they serve as a form of income maintenance. Due to the lack of explicit and legitimated state intervention, families have the main responsibility for their members. The reliance on family networks extends to employment and housing, and is reflected in the high proportion of self-employment and the large number of informal family helpers in southern Europe, which is well above the EU average. One worker in 10 is categorized as a family helper in Greece, and 44% are self-employed (European Commission, 2001, p. 114).

Another aspect of fragmentation arises from the delegation of provision of benefits and services for families to municipal authorities, resulting in large discrepancies in access and quality between Athens and the rural areas in Greece, between the north and south of Italy and between the autonomous regions in Spain.

Public perceptions of family policy

Public perceptions of family policy are related to levels of knowledge and awareness of policies affecting family life, and to the amount of confidence placed in the state to deliver appropriate policy measures. The willingness and ability of policy actors to respond to the impacts of socio-economic change on families and to implement policies that support family life are, in turn, restrained not only by conflicting objectives and priorities but also by the degree of public acceptability of external intervention in the private domain. Again, clusters of countries can be identified according to public perceptions of family policy, as reported in the surveys and interviews carried out with adults representing different family types, age and socio-economic groups in the IPROSEC countries. A summary of the findings and brings out the contrast between the consistently high ratings for France and Sweden, at the one end of the spectrum, and the more consistently low ratings for Greece, Italy and Spain, at the other. Germany, Ireland, the United Kingdom and the candidate countries provide a more mixed picture.

AWARENESS OF POLICY

In general, respondents were most aware of explicit, formal policies targeting family life, such as family allowances or child benefit, tax relief for spouses and children, childcare provision and parental leave, of which they have had direct experience. They were less likely to think spontaneously of education and training, health, housing, employment and elder care services as belonging to family policy, although they were acutely aware of the contribution such services make to the quality of family life.

Differences were observed both within and between countries in levels of awareness. Women and well-educated population groups across the 11 IPROSEC countries were found to be most knowledgeable about public policy for families, suggesting the need for improved communication networks to ensure the spread of information about the availability of benefits and services, particularly among lower socio-economic categories.

Respondents in France and Sweden showed most awareness of the interface between policy and family life, even though the actual amount received per head of population, at constant prices (index 1995 = 100) in family related benefits was below the EU average in both cases and had increased less than in the other IPROSEC countries during the 1990s (European Commission, 2003, p. 186).

In Germany, despite the high level of benefits, the highest in the European Union, respondents had relatively little awareness of current measures and considered that family policy was a low priority for government. In the United Kingdom, where the level of family related benefits per head of population was lowest and falling, media coverage of policy measures has been instrumental in raising public awareness of benefits and

services for families and children. In Ireland, which displays a relatively high figure per capita for family benefits, older people tended to assume provision was more widely available than it was in reality.

In Estonia, Hungary and Poland, families were conscious of the frequent changes in family policies but had difficulty in keeping abreast of the implications of these changes for their own families. They were more likely than respondents elsewhere to accept that policies designed to encourage family formation could contribute to national identity building.

In Spain, and especially in the south and in rural areas in Italy, families were not well informed about the family policy measures available to them. Knowledge and awareness of benefits and services tended to be greater among better educated respondents in Italy, despite a relatively high overall level of family benefits per capita. In Greece, respondents seemed to be aware of existing policy measures as far as benefits were concerned but were less knowledgeable about service provision for families.

LEGITIMACY OF POLICY

Attitudes towards the legitimacy of outside intervention in family life were found to vary both between and within countries according to the area of provision, the degree of coercion, the actors involved and individual socio-economic factors. Lower socio-economic groups were more likely to be positive about the legitimacy of family policies, while women were generally more cautious than men about turning to the state for support. Reactions of different age groups were largely determined by past experience, with older generations more often accepting the legitimacy of policies supporting traditional family forms, and younger generations expressing more liberal views towards policies that extend freedom of individual choice.

Overall, the French respondents reported the highest level of legitimacy for state intervention in family life. The state was expected to formulate and deliver responsive and proactive public policies that take account of family change. In Sweden, where the welfare state was taken for granted, respondents acknowledged unquestioningly the legitimacy of universal provision of benefits and services.

In Germany, Ireland and the United Kingdom, the three countries with partially co-ordinated family policies, respondents were more reluctant to accord legitimacy to the principle of outside intervention, except in the case of families at risk. They expected the state to play a supportive role but without interfering or intruding in family life. In Germany, state involvement in family affairs was considered legitimate if the aim is to support the family unit. The state was criticized, however, for delegating its responsibility to civil society. In Ireland, older respondents and those in rural areas were more likely to consider government intervention in family life to be legitimate. British respondents recognized the legitimacy of the role of the state only in providing protection and a safety net for families.

The legitimacy of policy was also contested in Estonia when the state intervenes to promote a particular family form but, as in the two other transition counties, Hungary and Poland, state intervention in family life was considered in most cases to be legitimate and necessary. Legitimacy starts with the provision of jobs, reasonable working conditions, adequate wages and pensions, and extends to support for families that are unable to meet their own needs and to the responsibility of society to guarantee the demographic survival of the nation.

In Greece, Italy and Spain, attitudes towards government intervention in family life were more ambivalent. The state is expected to provide a permissive and enabling legislative framework and to channel resources towards families, but without usurping the role of family members. The public, particularly in Greece and Italy, displayed a profound distrust of any interference in family life by the state, and respondents confirmed their continued heavy reliance on mutual support from trusted family networks.

ACCEPTANCE OF GOVERNMENT INTERVENTION

With very few exceptions, respondents did not accept public policies aimed at influencing family formation, size or structure, especially pro-natalist measures. For example, relatively little support was found across the countries studied for legislation prohibiting abortion, unmarried or same-sex cohabitation. Attempts to intervene deliberately to promote marriage as opposed to unmarried cohabitation, or to make divorce more

difficult, were strongly rejected, although religious convictions still seemed to be influential in shaping attitudes among practising Catholics. Consensus was found across countries in favour of state intervention in cases of domestic violence, to help underprivileged families and those with disabled members.

In France, Sweden and, to a lesser extent, the United Kingdom, families strongly supported and expected responsive and, in some cases, proactive policy intervention in family life. Although interviewees claimed that such intervention was a complement to their own provision, in France and Sweden, by comparison to the other IPROSEC countries, services such as those for children and older people could, in some cases, be interpreted as a substitute for family care.

In Germany, the southern European and candidate countries, policy intervention was only accepted as secondary to the support provided by the family and as a supplement to it. However, German respondents attributed to the state the main responsibility for ensuring the basic conditions needed for good quality family life. In Ireland and the candidate countries, family obligations remain strong, but public perceptions of duties and responsibilities appear to be changing, particularly towards older people. Family solidarity, which has long been relied on as the lynchpin of the support system, is weakening, making alternative provision all the more necessary. Respondents in Estonia, for example, expected support from the state, despite the fact that they knew they could not rely on central government to provide it. They did, however, place greater trust in local government.

Support for state intervention in southern Europe was tempered by the reluctance, particularly in Greece and Spain, to admit that families are unable to meet their own needs. Cash benefits, therefore, tended to be more readily accepted than services, because they leave families free to choose for themselves how to meet the needs of their members. In Italy, attitudes were more ambivalent about the acceptability of state intervention, and respondents were divided between their preference for cash benefits and their demand for more individualized services.

ACCESS TO POLICY MEASURES AND TAKE UP

An indication of the acceptance, or otherwise, of state intervention is the extent to which the available benefits and services are taken up by those eligible to receive them. Relatively few cases were reported of non-take up (none in Germany), particularly when benefits and services are provided on a universal basis and when efforts are made to inform beneficiaries of their rights, as in France. A notable exception was take up of paid parental and paternity leave by men. Everywhere, the relatively low take up was explained primarily by ingrained perceptions of gender roles, both within families and at the workplace, rather than outright rejection of state intervention. In Sweden, where take up of parental leave by men is higher than elsewhere, but still lower than might be expected in view of the incentives provided, respondents often cited income differentials as the reason why men may be less willing to take leave.

Across the IPROSEC countries, although the lowest income groups receive a disproportionate share of benefits, in most cases the highest rates of non-take up were found among the lowest socio-economic groups, defined in terms of employment status, educational qualifications and income. In Ireland, while respondents in lower socio-economic categories were more likely to be entitled to benefits, those in higher socio-economic categories, who were also better informed about their entitlements, made sure they received all the benefits and services for which they were eligible.

Reasons for non-take up varied between and within countries. In the United Kingdom, non-take up of some benefits was explained by people wanting to remain independent, by the complexity of the system and lack of knowledge about entitlements. In Greece, Italy and Spain, non-take up was most often attributed to the poor level of public provision, the lack of knowledge and awareness of available benefits and services, especially in rural areas, mistrust of external intervention, the preference for heavy reliance on family members and the view that entitlements do not match the changing needs of families. The stigma attached to means-tested benefits was cited as one reason for non-take up among older people in Greece.

In Estonia, Hungary and Poland, access and take up were practically universal, particularly in the case of benefits and services for children. Where changes in the system have made procedures more complicated, as in Hungary, and families have difficulty in complying with all the requirements and conditions, take up is

more limited. In Poland, the rising cost of services has made them less accessible. For some respondents, non-take up of subsistence benefits is explained by the humiliation they entail and the bureaucratic obstacles that have to be overcome.

ACCEPTANCE OF EMPLOYER INVOLVEMENT IN FAMILY POLICY

Effective alternatives to state provision and family solidarity that command the support of the public are difficult to find. Private and workplace delivery of services is limited in most countries, and nowhere did respondents consider it as an appropriate substitute for public policy, particularly with regard to childcare and healthcare. The public sector was widely seen as more supportive of workers with families than the private sector, which was often regarded with suspicion, and where provision is usually more limited. Under EU legislation, firms are expected to implement national legislation on leave for family reasons, but views were divided between and within countries over the extent to which employers should be sensitive and responsive to the private lives of their workers.

In France, Germany, Ireland and the United Kingdom, women in particular believed that employers have a responsibility for creating family-friendly workplaces, especially by offering flexible working arrangements. Employees were seeking flexibility that is freely chosen and designed to suit their needs, thereby serving as a valuable component in the work-life balance. However, flexible labour markets were generally considered as a source of economic and, consequently, family instability, requiring more rather than less state regulation. When flexibility was seen as being imposed by employers, as with part-time or temporary work in many countries, or, as in the informal economies of southern Europe and the candidate countries, when it offers low wages and little or no job protection, it was perceived as threatening and negative.

Views on workplace provision of crèches were divided. In Sweden, less than half the respondents, and slightly more women than men, felt employers should be involved in childcare provision. Respondents in Italy, Spain, the United Kingdom and Poland were least supportive. In Spain, workplace crèches were regarded with suspicion on the grounds that employees on temporary contracts or in small firms would be discriminated against, and that employers would take advantage of the existence of crèches to extend working hours.

Attitudes towards employer involvement in the provision of leisure facilities were ambivalent. The opinion was expressed, in most of the EU member states, that employers should not be involved, possibly due to the fear of employer paternalism, although facilities and services provided by workplace organizations, such as the *comités d'entreprise* in France, or initiatives by trade unions in Germany, were welcomed. Male respondents in Sweden considered leisure time as an area where employers could intervene.

In the candidate countries, where, under Soviet rule, employers had played an important role in delivering welfare services, including housing, opinions varied with regard to the situation today. In Estonia, for example, lower income groups and the older generation expected more support from employers. The involvement of employers in the organization of leisure activities was widely accepted.

ACCEPTANCE OF VOLUNTARY SECTOR INVOLVEMENT IN FAMILY POLICY

Little awareness was found across the IPROSEC countries of the role played by the voluntary sector in family life. The sector was generally ill defined and was referred to only insofar as it complements, or is a substitute for, public policy, particularly in the case of families at risk.

In France, which has a vibrant network of family associations working closely with government, the voluntary sector, as distinct from the associative network, was seen primarily as providing a safety net for families in difficulty. This was also the main role attributed to the sector in the United Kingdom, where co-ordination between organizations is less developed. The voluntary sector in Sweden was seen as playing only a limited role in policy formulation and even less in implementation.

In Germany, the voluntary sector and, more especially, the churches, were recognized for the valuable role they play in the provision of social care. In Ireland, religious organizations occupied a more powerful

position in the past. Today, they are being supplemented by secular organizations, which also tended to be viewed with suspicion, particularly among younger respondents.

In the southern European and candidate countries, where the involvement of non-religious organizations is limited, relatively little awareness was shown of the contribution the voluntary sector made, or could make, to family well-being. The potential for developing such a role was, however, moving onto the agenda, particularly in Estonia and Hungary, and instances were found in Italy of voluntary organizations actively intervening in family affairs.

The impact of public policy on decisions about family life

Just as opinions are divided about the legitimacy and acceptability of government intervention in family life, views also diverge over the extent to which public policy has an impact on the decisions taken about family life. Public policy in general would appear to have a greater indirect influence on such decisions than do specific family policy measures. Few respondents readily admitted that their decisions about family formation and structure had been directly determined by the availability, or otherwise, of family policy measures, although they regularly cited as a primary consideration the economic and financial situation of the family unit, which is influenced by employment and welfare policy. In the southern European and candidate countries, the overall impact of family policy is thought to be negligible, or even negative, due to the low level of provision and the low profile of the state in this policy area.

FAMILY FORMATION

Respondents admitted that family events were not always the result of rational decisions, reached after careful reflection and negotiation. Public provision of benefits and services for families were secondary considerations in encouraging family formation, whereas a secure income from employment, affordable housing and a sufficiently high standard of living were widely seen as preconditions for raising children.

In France and Sweden, while not directly determining decisions to have children, the overall generosity of public policy support for families was widely believed (by policy actors in the case of Sweden) to create an environment conducive to family formation.

In Germany, policy measures were felt to be more relevant to the management of everyday life than to decisions about whether or not to have children. Respondents in the United Kingdom did not mention policy as a factor affecting decisions about whether or not to have children, but the family's economic circumstances were said to influence the timing of births. Irish respondents made a similar point. The job situation and the state of the economy were considered to be more influential in decisions about family formation than specific family policy measures. However, changing social norms and the availability of effective forms of contraception, which are dependent on public policy, were also found to influence the ability of families to achieve their ideal family size.

In Greece, Italy and Spain, in the absence of family-friendly public policies, the availability of family support networks was considered to be an important factor determining decisions about family building, particularly for lower socio-economic groups.

Access to employment and a living wage were central factors in the decision-making process in the candidate countries. In Estonia, Hungary and Poland, decisions about whether or not to have children, and about family size, were affected to a large degree by the availability of jobs, reasonable working conditions and pay, the overall level of support for families in the community at large and the confidence people had in government to deliver a high standard of public services (health and education). The reduction in the provision of benefits and services, including housing, previously mediated through the workplace, was perceived as a disincentive for family building.

FAMILY LIVING ARRANGEMENTS

In most countries, respondents saw specific family policy measures as responses to socio-demographic change rather than as attempts to determine family living arrangements, for example the alignment of benefit

entitlements between unmarried and married cohabiting couples. They were more willing to admit they took some account of public policy in deciding about their living arrangements, at least insofar as provided for by legal frameworks, than about family formation.

In countries where unmarried cohabitation is widespread, unmarried partnerships can be formalized through cohabitation contracts, as in France, Germany and Sweden, or solicitors can draw up legally binding contracts between unmarried cohabiting couples in the United Kingdom with regard to property, home ownership, savings and investments. Permissive legislation means that the main factors said to affect decisions about whether to marry or cohabit in these countries were personal feelings about the value of marital status, which may, in turn, be reflected in public policy.

In France and Poland, some younger couples had calculated the difference marriage would make in benefits and tax concessions, particularly when they were planning to have children. In Estonia, couples were found to take account of the fact that joint taxation of married spouses can give tax relief.

In Germany, decisions to marry rather than live in consensual unions were influenced by a policy environment favouring married couples. Elsewhere, decisions about whether to divorce or separate, and remarry, were affected not only by the legislation in place but also by the cost of divorce procedures. Prohibitive or restrictive legislation on abortion and divorce, as in Ireland and Poland, was found to influence decisions by limiting freedom of choice. In Greece, Italy and Poland, where moral opprobrium is still attached to unmarried cohabitation and lone parenthood, social pressure, as reflected in legislation, was an important factor determining decisions about whether or not to marry.

To a greater extent than in the other countries, especially in the middle and higher income groups, respondents in the United Kingdom were prepared to admit that the choice of where to live had been determined by the quality of local services, especially for childcare and education.

In southern Europe and the candidate countries, respondents had chosen where to live primarily due to the proximity of family members, but their choice was also determined by the availability of suitable and affordable housing. In these countries, parents expected to be able to secure jobs for their offspring and to assist them with housing rather than relying on the state to provide for them.

In Greece, Italy and Spain, decisions by adult children about whether to continue to live in their parents' home, or by families about whether older people should live with their children, were taken to a large extent according to the availability of morally acceptable and financially viable alternatives, and were influenced by the legal obligations placed on families to maintain their members. In Ireland, generous public policies to support people in old age were seen as instrumental in decisions about the living arrangements of older people, determining whether or not they could remain independent.

WORK-LIFE BALANCE

The extent to which public policy affects decisions about whether or not women enter and remain in paid employment was found to vary according to the approaches adopted by governments towards labour market policy and towards issues concerning work-life balance.

In France, Sweden and the United Kingdom, the most important factors said to influence decisions about whether or not mothers should take paid employment were the availability, or otherwise, of public policy support for good quality affordable childcare in harmony with working hours, freely chosen flexible working patterns and parental leave arrangements, particularly for the medium socio-economic groups in France and the United Kingdom.

Views about parental leave were ambivalent in Germany insofar as they could be interpreted as a measure to avoid the need for public childcare provision and confirmed women as primary carers, since women are much more likely than men to take leave. The taxation system was perceived as favouring the male breadwinner model and providing a further disincentive for women to remain in employment

In the United Kingdom, where taxation is individualized, but tax credits are re-establishing the family as a tax unit, and in countries where tax incentives are designed to encourage women to remain in the workforce, the tax system was believed to penalize the male breadwinner family.

In Greece, Italy, Spain, Estonia, Hungary and Poland, decisions about whether or not women with young children undertake paid work were affected to a much greater extent by the ability of employment policy to deliver suitable and secure jobs, compatible working hours and a reasonable level of pay than by policies on leave and childcare. Families also took account of the overall level of support in the community at large. In the absence of state provision, particularly in rural areas, the availability of family care was the most usual arrangement making it possible for women to enter and remain in the workforce, but was rarely seen as the most satisfactory means of achieving work–life balance.

Matching policy and expectations

When information from the analysis of policy contexts and interviews with elite policy actors is combined with survey data and the views and opinions of family members a close match is found between the explicit, coherent, state-centric and co-ordinated, or joined up, family policy process in France and Sweden and the high level of awareness, legitimacy and acceptability of family policy measures. This concordance translates into a high level of take up of policy measures and the recognition of the role played by economic and civil society actors. The interviews with family members confirmed the high expectations they had of the state to deliver family support measures and their belief in the right of citizens to demand and receive high quality, affordable services.

At the other end of the continuum, the three IPROSEC countries characterized by fragmented, unco-ordinated and underfunded systems of welfare provision for families, namely Greece, Italy and Spain, displayed almost consistently low levels of awareness, legitimacy, acceptability and take up of benefits and services, and involvement of economic and civil society actors. The reports from the interviews demonstrated that expectations of the state to deliver family policy were equally low. Respondents were not, therefore, disappointed. They were far from being confident that the state and, more especially, central government could do better, precisely because the welfare system was so fragmented, lacked co-ordination and was unlikely to receive a large injection of funding. They were, however, concerned that intrafamilial solidarity was becoming more fragile with the result that they might not, in the future, be able to rely so heavily on family members and would need more support from the state.

The three countries depicted as having rhetorical, indirect and partially co-ordinated family policies, Germany, Ireland and the United Kingdom, diverge with regard to public perceptions of family policy, as recorded in the fieldwork. While German respondents report a relatively low level of awareness of policy measures for families, and a medium level of legitimacy and acceptability of government intervention, their access to benefits and services and reliance on the voluntary sector put them in a more advantageous position than respondents in Ireland and the United Kingdom. The countries in this cluster share their criticism of the gap between political rhetoric and reality and their reluctance to see government intervention intrude any further into the private lives of families.

Respondents in the three transition countries are characterized by their shared sense of the legitimacy of state intervention to support families, as well as their concern that the state has not been able to deliver the benefits and services needed to ensure a sufficiently high standard of living to make family formation and childrearing a viable option.

With the notable exception of France, respondents in the IPROSEC countries are not seeking a coherent set of policies that identify families as the deliberate target of specific actions, and that have an impact on family structure. They do, however, expect governments to deliver policy measures that impact on family life, including labour market and employment policies, public provision of education and healthcare, and measures designed to protect children or older people, and prevent social exclusion.

3.5 POPULATION DECLINE AND AGEING

By the end of the twentieth century, low fertility rates in combination with greater life expectancy had resulted in population decline and ageing across Europe. Predictions for the twenty-first century indicate that the problems associated with these demographic trends will be exacerbated and are set to create serious challenges for societies. In this section, the main socio-economic trends associated with population decline and ageing are identified, followed by an analysis of the issues they raise for governments in the 11 IPROSEC countries. An overview is provided of the responses to change attempted by policy actors in each country, together with an assessment of the possible outcomes of the measures being implemented. The conclusion explores ways of improving the match between policy and practice.

Falling fertility rates

Low fertility is characteristic of an advanced stage of demographic transition. In combination with population ageing, falling fertility rates can threaten the demographic balance, engendering economic and political problems for democratic societies.

The total fertility rate (TFR) provides a snapshot of trends in fertility for women at a particular point in time. It refers to synthetic cohorts and is based on the sum of fertility rates by age over the period under consideration for women of different ages (Leridon, 1990). The measure affords a good indication of fertility if reproductive behaviour is stable, but is less reliable if sudden changes take place, as for example with the downturn following the transition in the candidate countries or the 'millennium effect', which may help explain the upturn in the TFR in France in 2000. In relation to the rest of the world, the European Union displays a relatively low TFR (1.48), albeit above that for Japan (1.41) and the Russian Federation (1.25) (Eurostat, 2002a, table A-3).

TFRs fell in all the IPROSEC countries between 1970 and 2000, despite momentary upward fluctuations in Germany, Sweden and Poland (Eurostat, 2002a, tables E-4, J-8). The fall has been particularly marked in Ireland, which started from a much higher base, but remained well above the EU15 mean: on average, women in Europe were producing only 1.48 children in 2000. Among the IPROSEC countries, the highest TFRs were recorded at the turn of the century for Ireland (1.89) and France (1.88). Very low levels were reached in Italy (1.24), particularly in the north, and in Spain (1.23). The rate had fallen to the lowest level of all (1.22) in the *Länder* of the former German Democratic Republic. In common with the other candidate countries, Estonia and Poland saw their TFRs fall steeply from the early 1990s during the turbulent period of transition from the Soviet era.

A factor contributing to the decline in TFRs is the growing number of women who are remaining childless. According to the available data, Ireland and Italy, as many as one in five women are childless at the age of 35, and at the age of 40 in West Germany, and England and Wales. Childlessness is a much less widespread phenomenon in France, Estonia and Hungary and has stabilized in Sweden at a medium level (Boleslawski, 1993, table 1; Bundesinstitut für Bevölkerungsforschung, 2000; Eurostat, 2002a, table E-12; Sardon, 2002, table 7; Estonian Statistical Office, 2002a).

CHALLENGES

The speed at which TFRs have fallen and at which the level of childlessness is growing, sometimes described as the 'birth strike', are seen as causes for concern, both in media debates and among policy actors, not only in Germany, the southern European and candidate countries, where fertility rates are very low, but also in countries such as Sweden where they are above the EU15 average or, as in France, where they are relatively high and rising. The challenge for governments is whether to intervene to curb falling birth rates and encourage childbearing and, if so, how to find measures that are likely to be accepted by the public and that would prove effective in reversing the trend.

RESPONSES

Government intervention, where it does exist, may take the form of prohibitive legislation to restrict abortion and contraception, as in Poland, or to make it illegal, as with abortion in Ireland. Most societies reject

prohibitive and explicit pro-natalist policy measures (population policy) aimed at deliberately influencing population size and seen in southern Europe as a legacy of totalitarian regimes. Respondents in the IPROSEC study were generally opposed to any government intervention that might be construed as an attempt to force couples to have children.

In societies where proactive intervention is accepted, policy may be designed to promote childbearing by giving a high priority to family matters, as in France, by creating a family-friendly social and workplace environment, as in France and Sweden, or by providing financial incentives to couples, such as tax breaks for children in France, Germany, Greece, Spain and Hungary, and tax relief from the third child in Estonia. In addition, Estonian students with loans are allowed to suspend repayments for a year after graduation if they give birth to a child.

Whether or not the aim is explicitly to encourage family building, all IPROSEC countries, except Germany, Spain and the United Kingdom, provide higher levels of benefit for larger families or supplementary benefits. In specified circumstances, the cost of fertility treatment is covered in France, Germany, Spain, Sweden, the United Kingdom and Hungary, although the subsidies paid in Spain are very low, and access to treatment is extremely difficult to obtain. In Ireland and Poland, fertility treatment is not controlled by legislation. In Spain, Hungary and Poland, economic hardship and job shortages are believed to be contributing to falling fertility.

Policy responses that may help to curb falling fertility in the IPROSEC countries. France, Germany and Hungary all offer specific proactive family policy measures to support family formation and assist couples with infertility problems, in the form of tax incentives, higher benefits for large families and subsidized fertility treatment. Only Ireland and Poland have enacted prohibitive legislation, and together with Italy and the United Kingdom, they make available just one of the three supportive measures listed. The remaining countries have implemented at least two of the supportive measures, but with the exception of Sweden, generally under restrictive conditions that limit access.

OUTCOMES

No evidence was found to show that negative or prohibitive measures designed to reverse the fall in birth rates are successful in achieving their aims. In Ireland, for example, women seeking an abortion continue to travel abroad to obtain it. Nor was unequivocal evidence available to demonstrate that supportive family policy measures are necessarily responsible for an increase in the number of births, although the indications are that the lack of such measures and, more especially, of effective economic policies may be contributing to the continuing fall in fertility rates. In this case, the use of targeted job creation schemes and income support to improve the employment situation may have the side effect of encouraging family formation.

It may be no coincidence that countries such as France, where the policy environment is overtly supportive of family life, have maintained TFRs above the EU15 average, or that levels have fallen in southern Europe where state support is limited. However, the extensive welfare provision in Sweden would not seem to be sufficient to prevent fluctuations in the relatively high TFR: in 2000, it had fallen below the EU15 average and was lower than in the United Kingdom, where the policy environment was much less supportive of family life.

Non-replacement of population

A more accurate indicator of trends in fertility over time is provided by the completed fertility rate (CFR), since it measures the actual number of children produced by a given cohort of women by the time they reach the end of their natural reproductive period. The CFR indicates whether the fall in TFR is being compensated at a later age and is merely a result of postponed childbirth. It thus provides evidence of underlying trends.

By 2000 for the 1930–60 cohorts of women, CFRs fell consistently across the IPROSEC countries, with the exceptions of Sweden, Estonia and Hungary, where the statistics registered an upturn for the most recent generation of women (Boleslawski, 1993, table 1; Eurostat, 2002a, table E-6, 2002c, p. 30; Sardon, 2002, table 4). Only in Ireland (2.41), Poland (2.18) and France (2.1) was CFR above the replacement level of 2.1 children for women born in 1960. The lowest levels were reached in Germany (1.65) and Italy (1.67).

The non-replacement of population due to low fertility is contributing to negative natural population growth, which had slowed down to 1 per 1000 across the EU by 2000. The level had already fallen below 0 in Germany, Greece, Italy and Sweden, Estonia and Hungary, with Estonia suffering a dramatic decline in growth over the period. Eight of the 10 candidate countries set to join the European Union in 2004 were recording negative natural population growth in 2000 (Eurostat, 2002a, tables B-2, J-4).

If the very low fertility rates in Germany, Italy and Spain, and many of the candidate countries persist, the EU and, more especially, the enlarged Union as a whole could experience negative natural population growth within the next decade, in the absence of compensating factors such as non-EU immigration.

Since the 1970s, net migration rates have fluctuated markedly across the IPROSEC countries. While rates appeared to be falling in several of the countries that had previously been the destination for migrants, by the end of the twentieth century, Ireland, Italy and Spain, as well as Hungary, which were not traditionally hosts for migrants, had seen their rates increase (Eurostat, 2002a, tables B-3, J-5).

CHALLENGES

Widespread concern is being expressed about the impact of non-replacement on population dynamics, the future labour supply, and economic and social development. The prospect of negative natural population growth raises issues about the desirability of immigration as a means of sustaining population growth, at a time when all governments are attempting to seal their borders against illegal migrants, when racial tensions are growing, as for example in France, Germany, Ireland, Italy, Sweden and the United Kingdom, and when racial discrimination is being outlawed at EU and national level.

The challenge for governments faced with non-replacement of population is how to sustain the labour supply, and how to plan and fund public provision to meet the social needs of a declining population. Governments must decide whether to relax control over non-EU immigration, and how to avoid racial tensions, while integrating foreign workers into the host community.

RESPONSES

In keeping with the European employment guidelines, governments across the EU are introducing proactive measures to bolster the future labour supply, including the removal of barriers to labour market entry for young people through training schemes designed to enhance employability. Tax and social insurance incentives are being used to encourage employers to take on unemployed and underemployed people and to recruit workers in areas of labour shortage, with the exception of Greece. Domestic services and care work are being regulated and protected to bring them within the formal economy in France, Germany, Spain, Sweden, the United Kingdom and Estonia.

Where benefits and public services are funded primarily from employment-related insurance contributions, as in the continental welfare states, governments are introducing higher levels of contributions, and are seeking alternative sources of funding to avoid reducing benefits. Where they are funded primarily through taxes, as in Sweden, exemplifying the Nordic states, thresholds are being raised as far as is politically acceptable.

Fixed-rate charges have been introduced for some services, including in Sweden, where provision is universal. Child benefit and family allowances are means tested in Italy, Spain and Poland. In Greece and Spain, they are taxed and, in Greece, they are dependent on the beneficiary being in waged work.

Voluntary organizations are increasing their involvement in service provision, and public-private partnerships are being developed in Ireland, Italy, Spain, the United Kingdom, Estonia and Poland, for the delivery of services.

Opinions among policy actors are divided in many countries over the acceptability of immigration as a means of supporting population growth. In the context of EU enlargement, national governments are reluctant to relax control over non-EU immigration to make up for the shortfall in labour, except for the recruitment of well-qualified working age migrant labour in areas of labour and skills shortages, as in the

health and education sectors in the United Kingdom, or through targeted schemes in Ireland in high tech industries and in research and development in Sweden.

Governments are implementing supportive measures (education, training, employment and housing schemes) for the integration of migrants and their families into the host community in France, Germany, Ireland, Italy, Spain, Sweden and the United Kingdom, or to relieve ethnic tensions in Estonia. In Italy, residence permits are being linked to the employment contract. In Sweden and the United Kingdom, provision is made for children from ethnic groups to learn their mother tongue as well as the host country's language.

A summary of policy responses indicates that none of the measures to offset the effects of non-replacement of population is universally applied across the IPROSEC countries. Greece stands out as the country where policy responses are most limited and contrasts sharply with Italy and Spain, where governments have been more proactive in responding to the slowing down of population growth. Greece is, moreover, the only country not to offer tax breaks as an incentive for employment creation. The British government has also implemented all but one of the measures listed, primarily in an effort to curb public spending. In the two countries most affected by negative population growth, namely Estonia and Hungary, governments have not responded to the same degree, suggesting they may be faced with competing or conflicting priorities. The two countries displaying the highest rates of net migration, Ireland and Spain, are both actively recruiting non-EU migrant labour, but differ in their approach with regard to the integration of immigrants.

OUTCOMES

It is too early to assess the longer term impact of most of the responsive measures that are being put in place to offset the negative effects of non-replacement of population for the labour supply. However, indications can be found of rising employment levels among previously under-employed population groups, especially women, in northern Europe and Ireland, as reported in Section 5 of the present volume.

Measures to achieve more balanced funding of benefits and services seem, as yet, to be having only a limited impact on levels of spending. As a percentage of gross domestic product, social protection expenditure fell throughout the 1990s in Ireland and Spain. After fluctuating, the proportion had fallen by the end of the period in Sweden and had increased in the other EU IPROSEC countries. In 2000, Ireland was spending the smallest (14.1%) and Sweden the highest (32.3%) proportion of GDP on social protection (European Commission, 2003, p. 186). Comparable data are not available for the candidate countries for this variable.

The available evidence suggests that non-EU immigration is sustaining population growth in Germany, Greece, Italy and Sweden, and is supplementing the labour supply in specific areas of employment. Although policies to promote multiculturalism have become an agenda item, the issue remains problematic for most societies, and increasingly so for southern Europe, which had long been accustomed to outward rather than inward migration. Ireland has also seen a reversal in patterns of migration, as the economic boom of the 1980s and 90s encouraged the return of Irish emigrants as well as attracting new waves of non-EU immigration.

Population ageing

Another characteristic of an advanced stage of demographic transition is prolonged life expectancy. Across the IPROSEC countries, life expectancy at birth has been rising since the 1970s, though it started from a much lower base in the candidate countries and changed very little between 1979 and 1985. In 2000, Sweden, Spain and France were recording the longest life expectancy (United Nations, 2002 online). By 2025, Germany and the United Kingdom will also be above the EU15 average. The three candidate countries will have made up some of their lost ground, but will still have lower life expectancies than the other IPROSEC countries.

Falling fertility in combination with greater life expectancy is resulting in a rise in the average age of the population across the European Union (United Nations, 2002 online). In 1970, the EU15 average was above that for the United States of America and Japan but, since 1985, Japan has recorded the highest average age and will continue to do so into the foreseeable future. By 2025, at 45 the EU15 average age will be seven years above the level in 2000, and Italy will have reached a higher figure than Japan. Among the IPROSEC

countries, Ireland consistently displays the youngest average age over the period. In 2000, the countries with the oldest average age were Italy, Germany and Sweden. By the year 2025, while Italy is predicted to retain its position, Germany and Sweden will be overtaken by Spain and Greece.

The combination of low fertility and life expectancy also determines the proportion of older people in the population. The population aged over 65 and over 80 has been increasing at a faster rate in the European Union than in the United States of America, but at a slower rate than in Japan (United Nations, 2002 online). Among the IPROSEC countries, in 2000 Greece, Italy and Sweden had reached a level close to Japan for the proportion of the population aged 65 and over, and Sweden had overtaken Japan for the population aged 80 or above. Between 2000 and 2025, the proportion of the population aged over 80 is set to double in Germany and Estonia.

The combined impact of population decline and ageing over time can be assessed by comparing indicators for total fertility, natural population growth and net migration to those for life expectancy at birth, average age and the proportion of the population aged under 24, or over 65 and 80, in relation to the EU15 average (Eurostat, 2002a, tables B-2, B-3, E-4, J-4, J-5, J-6, J-8; United Nations, 2002 online). When considered at three data points (holding the population growth/decline indicators at 2000 levels for 2025), change is found to be occurring at a different rate and pace across the IPROSEC countries, and it has been moving in different directions, both between countries, and within countries, as reported in the second issue of this series of papers. Ireland stands out as the only country consistently displaying a high population growth rate in conjunction with a relatively young population across the period. France is distinguished at the three data points by relatively high population growth and by ageing in the earlier periods, though not in 2025. The indicators for the three candidate countries fall almost solely into the quadrant for young age and declining population, with the notable exception of Estonia for the earliest period. Spain has moved in the opposite direction to France, from a position in the 1970s where population was growing and relatively young to one where growth was combined with population ageing by 2000. The United Kingdom is distinguished from most of the other IPROSEC countries by its shift from combined ageing and declining population in the 1970s to a growing and ageing population in 2000, but with anticipated growth and rejuvenation by the year 2025. Sweden remains in the ageing and declining quadrant throughout the period but moves closer to the EU15 mean, while Italy and Greece are moving in the opposite direction. In the same quadrant, Germany moved closer to the mean in 2000, but is expected to move further away from it in 2025.

CHALLENGES

The consequences of population ageing for economic and social well-being are a cause for concern in EU member states where third and fourth age population groups have already reached an unprecedented size. These issues are expected to become of greater concern over the coming decade in Germany, Greece, Italy, Spain and Sweden. The topic has also begun to appear on the political agenda in the candidate countries, where the proportion of older people is expected to rise steeply over the next quarter of a century. Life expectancy should be extended as improvements are made in living and working conditions, and in the treatment of debilitating diseases. The challenges raised for governments by population ageing are whether anything can be done to curb the trend and to offset its negative effects on society, in particular by ensuring the future viability of pension schemes and the provision of good quality, affordable social and medical care for older people. Governments are also being called upon to introduce measures to prevent age discrimination (ageism).

RESPONSES

Permissive legislation has been introduced to allow euthanasia for people suffering from chronic illnesses in Belgium and the Netherlands, but not in the IPROSEC countries, although in some cases assisted suicide is practised without being legally recognized. Governments in northern Europe and the United Kingdom are investing in research into diseases associated with ageing in an effort to reduce their impact on society. Everywhere except Greece and Poland, governments are implementing preventive measures to reduce health risks (smoking, alcohol consumption, substance abuse, road accidents), particularly among younger people. Legislation on soft drugs is, however, being relaxed in the United Kingdom. Campaigns in the same countries are designed to promote healthier living, in an attempt to improve health standards in old age.

All EU member states have launched reforms to ensure adequate incomes for older people without jeopardizing public finances. Proactive measures are being extended to make pension schemes sustainable and equitable. Reform of funding mechanisms is aimed at guaranteeing their viability. The number of years of contribution has been increased in France, Germany, Italy, Spain, Sweden and Hungary. Most countries are introducing supplementary and private pension schemes, and are tightening up regulations to ensure their financial sustainability. Germany, Italy, Estonia and Hungary are raising retirement age. All countries except Greece, Ireland and Poland are introducing flexible retirement arrangements. Early retirement is being discouraged in Italy, Spain and Sweden. Alternative funding mechanisms are being introduced to cover the costs of social and medical care for older dependants in their own homes and in residential care in France, Germany, Ireland, Sweden, the United Kingdom, Estonia and Hungary (see also Section 6).

Powerful lobbying groups at national and EU level are campaigning to protect the interests of older people in the context of fundamental rights legislation. Measures to prevent age discrimination include provision under equal opportunities legislation for removing age barriers in recruitment and training for older people in Spain, Sweden, the United Kingdom and Hungary, as proposed in the European Code of Good Practice on Ageing and Employment. In Estonia, all references to age are prohibited in job advertisements.

A summary of policy responses to population ageing in the IPROSEC countries suggests that Spain and Sweden, two of the countries most affected by ageing, have introduced the largest number of measures to offset its negative effects, albeit with substantial differences in the level of provision and the extent of implementation. Although Sweden has not raised retirement age further, it already has the latest age of retirement in the European Union: workers can retire between the ages of 61 and 67, and the actual average age of retirement is 61. The two countries that have to date paid least attention to the problems of population ageing are Greece and Poland, as indicated by the almost complete absence of designated policy measures. For Poland, ageing is a less immediate concern, given the relatively low life expectancy, but for Greece the issue is increasingly pressing and needs to be addressed urgently.

OUTCOMES

The absence of permissive legislation on euthanasia and assisted suicide is resulting in high profile cases being brought to the attention of the media, for example when individuals with chronic illnesses are reported to have travelled abroad to countries where euthanasia is not outlawed. Legal challenges are being mounted in the courts as a human rights issue.

Measures to prevent premature deaths, such as anti-smoking and road safety campaigns are meeting with some success, as demonstrated by indicators for deaths from these causes. Despite the much greater density of traffic, the number of deaths in road accidents fell substantially across the European Union during the 1990s, although it remained much higher in Greece, Poland, Estonia, France and Spain, which recorded levels well above the EU15 average in 2000 (European Commission, 2002c, pp. 129, 142).

The full impact of population ageing on pension schemes has yet to be felt. Early indications are that the measures being taken may help alleviate the problem, but probably at the cost of higher contributions from employees, lower pensions, a longer working life and greater expenditure on care provision. The fear that their situation will deteriorate as a result of such measures has provoked strong opposition from workers in some countries, as testified by the waves of strikes that hit the public sector in France whenever pension reform is on the parliamentary agenda, as in autumn 1995 and early summer 2003.

Evidence from firms and trade unions indicates they are starting to recognize the importance of the 'business case' for employing older people, primarily on the grounds that they can obtain a return on their investment in human capital. Early labour market exit, which was a widespread practice in firms seeking to restructure their workforce in the 1990s, has been called into question, but practices are changing only very slowly. Despite European guidelines, measures to combat ageism in the labour force have not been implemented across the IPROSEC countries, and wide variations are found in effective retirement age. In 2000, at age 55–64, less than 48% of the male population in EU15 were in employment, ranging from as low as 33% in France and Hungary to 60% in the United Kingdom, 63% in Ireland and almost 68% in Sweden (European Commission, 2001, pp.110–33).

Matching policy with practice

When composite indicators are compared to the policy responses of governments in the IPROSEC countries, the appropriateness and commensurability of policy measures is found to vary considerably from one country to another. The level of debate and of policy interest does not always match the extent of change and its actual or potential implications. It is not necessarily the governments in the countries that are likely to be facing the most serious problems over next two decades who see the situation as most problematic or who are taking the most effective evasive or preventive action. In addition, governments concerned about their country's demographic future were generally found to react to short-term fluctuations in fertility rates, rather than paying attention indicators of trends in the longer term. Fluctuations in TFRs may be no more than an effect of timing, as exemplified by Sweden, Estonia or Hungary. Rather than adopting precipitate reactions, governments need to take account of underlying trends in fertility rates, as recorded by CFRs, and to consider their impact in combination with other indicators, particularly life expectancy and migratory movements, to enable them to engage in longer term planning.

Governments also need to be mindful of the acceptability and effectiveness of policy measures. As demonstrated in this and the second section in the present volume, families seem to take little account of specific individual family policy measures, such as the level of child benefit, when deciding whether or not to have children, and they reject prohibitive and constraining measures. They pay much more attention to the overall financial and political climate, and the prospects of maintaining or improving their own standard of living. Governments, therefore, need to pursue policies designed to create a general socio-economic environment conducive to family building and supportive of family life, but without resorting to targeted, coercive and intrusive populationist measures.

Although the challenges raised by population ageing may appear to be similar, analysis of the experience of population ageing and future predictions produces a very different picture from one country to another. In its first evaluation of national strategies for adequate and sustainable pensions, adopted in December 2002, the European Commission drew attention to the fact that not all member states had comprehensive strategies to allow them to claim they were ready to meet the ageing challenge. In this respect, the target set by the Barcelona European Council, to raise the average age of withdrawal from the labour force by five years by the year 2010, requires much greater efforts in some countries to improve the employability of older workers and to ensure the financial sustainability of pension systems.

While Italian governments seem to be aware of the urgency of their situation and have taken action to alleviate the problems associated with it, Greece, for example, seems ill prepared to deal with the impact of the demographic time bomb. The measures taken in Sweden, Germany and the United Kingdom put them in a more comfortable position, the more so in Sweden, since, in the longer term, the effects of population ageing are expected to level off. Ireland will remain in a relatively favourable position as its younger population progresses through the age pyramid, but Irish governments were found to be taking pre-emptive action. Although France is faced with less severe problems of population decline and ageing in the immediate future, the early retirement policies pursued in the past will impact on the viability of pensions in the coming decades, as the postwar baby boom generation reaches retirement age. Current economic conditions in the candidate countries, associated as they are with low wages and high levels of unemployment, will affect their ability to cover the pensions of their older population as life expectancy increases.

The information collected for the IPROSEC project suggests that a one-size-fits-all solution is not appropriate to deal with the consequences of the slowing down of population growth for population dynamics, the labour supply and social protection systems. As illustrated by the data examined in this section, the predictions for population decline are very different from one country to another, but so are their welfare arrangements and policy orientations, suggesting that governments should seek solutions that are appropriate to the socio-economic conditions and the policy environment, while paying attention to public opinion regarding the legitimacy and acceptability of public policy interventions. Governments seeking to offset the effects for social protection of the non-replacement of population need to consider the readiness of the public to pay higher taxes and social insurance contributions. They are being required to take account of the availability of untapped labour within an enlarged Union and the issues associated with further non-EU immigration. The countries that have hitherto not developed effective policies to prepare for population decline and ageing might usefully observe and learn from the experience of their neighbours.

3.6 CHANGING FAMILY STRUCTURE

In the closing decades of the twentieth century, major changes were being reported in patterns of family formation across Europe, as non-conventional living arrangements became more widespread, raising doubts about the viability of the family unit (Coleman, 1996; Commaille and de Singly, 1997; David, 1998; McRae, 1999; Chauvière and Bussat, 2000; Carling *et al.*, 2002).

De-institutionalized family forms have not, however, developed to the same extent across all the IPROSEC countries. The challenges facing policy actors and their reactions to them also vary between countries, but without necessarily being commensurate with the pace and nature of the changes observed. This section explores and contrasts changing patterns of family formation, the de-institutionalization of family living arrangements and persistent and new forms of social inequality associated with them, both between and within societies, requiring policy responses from governments. The reactions of policy actors are examined as well as the possible outcomes of policy measures for each of the topics, leading on to proposals for improving policy responses.

Changing patterns of family formation

In the postwar period, for most people in European societies, marriage was considered as the first stage in family formation and as a socially normative precondition for childraising. This is less often the case today, particularly among the younger generations. Marriage rates have been falling across the European Union and, more especially, in the candidate countries since the 1970s, but with marked variations in pace and degree (Council of Europe, 2001 online; Eurostat, 2002a, tables F-3, F-9, J-13, J-15). By the year 2000, the IPROSEC country displaying the lowest marriage rate and recording the steepest decline was Estonia, with a total of 4 marriages per 1000 population, compared to 10 in 1960. Among the IPROSEC EU member states, the lowest marriage rates were found in Greece and in Sweden, which already had the lowest level at the beginning of the period under consideration. Poland maintained the highest rate in 2000, followed by Spain and France, which were the only two countries to register an upturn between 1985–2000.

One of the reasons helping to explain the fall in the marriage rate at a given point in time is that marriage is progressively being postponed. Across the European Union in 2000, first marriages for women were being delayed by almost five years until after the age of 28, compared to 23.2 in 1970. Among the IPROSEC countries, Estonia, Hungary and Poland recorded the youngest age at first marriage. Poland displayed both the youngest age and the highest marriage rate at the end of the century. Sweden had seen the most marked postponement in age at first marriage, by more than six years, whereas the change in Estonia was relatively small and, as in Spain, age at first marriage had fallen by the middle of the period.

In line with the later age of marriage, age at first childbirth and mean age at childbirth have also been postponed (Council of Europe, 1997, table, T3.5, T3.4, 2001 online; Eurostat, 2002a, tables E-5, E-10, J-9). Women in the United Kingdom are having their first child at 29.1 years, compared to 24 years in Estonia. The EU15 average age at childbirth has risen to 29.3. In Ireland, where the total fertility rate is high, but also in Italy and Spain, where it is relatively low, average age at childbearing is over 30.

While age at first childbirth has been rising, the number of teenage pregnancies has generally been falling (Council of Europe, 2001 online). Exceptions are Ireland, which started from a low base, and Spain, where the rate rose in the mid-1980s. The lowest teenage pregnancy rate had been reached in Italy by the end of the period, in sharp contrast to the level recorded in the United Kingdom, Estonia and Hungary.

CHALLENGES

The combination of falling and delayed marriage rates with the postponement of age at childbirth is raising a number of questions for governments concerned about the effects of the timing of births on family structure, and ultimately on the future demographic health of the nation. Some governments are also looking at the health risks associated with delayed childbirth and are seeking ways of dealing with the high number of teenage pregnancies and abortions. Not all governments, however, are reacting in the same way to ostensibly the same phenomena. The high level of teenage pregnancies is an issue of continuing concern in the United Kingdom and Hungary, insofar as it is often associated with lone motherhood and, consequently, social and

economic problems. In Estonia, where births are encouraged among women of all ages, it is the large number of abortions among teenagers that is a cause for concern and not teenage pregnancies. The issue is also receiving attention in Spain, although in relative terms, the level is much lower.

RESPONSES

In northern Europe, policies designed to influence the timing of births have generally concentrated on measures designed to discourage teenage girls from having children, often on the grounds that teenage pregnancy is undesirable both for the women involved and for society at large, and can be interpreted as a failure of birth control among young women who have not established stable relationships.

All IPROSEC countries except Greece and Poland include guidance on contraception in sex education programmes, although schools may not always implement such programmes systematically, as was found for example in Italy. In Estonia, in addition to sex education, attention is focused on the promotion of reproductive health in an effort to prevent recourse to abortion. In France, contraceptives are made available in schools. Access to abortion is facilitated to avoid unwanted pregnancies in the girl's best interests in Sweden, and young people are encouraged to attend counselling clinics. In the United Kingdom, effort is concentrated on getting teenagers into education, training or employment and on improving access and use of effective methods of contraception.

While most governments have been seeking to discourage women from having children at an early age, less attention has been paid to the health risks and medical complications often associated with later pregnancy. In France, the United Kingdom, Estonia and Hungary, women giving birth to their first child at an older age are made aware of the health risks by medical practitioners and are given advice and support. Most countries have put in place legislation to regulate the conditions under which couples can obtain fertility treatment, since older men and women are more likely to suffer from infertility. Although a similar scheme operated in France in the immediate postwar period, only in Sweden is a speed premium paid to women to accelerate the timing of births. Women who have their second child within 21 months of the first receive the premium, the expectation being that they will have more children if the gap between births is shorter.

Measures designed to influence the timing of family formation are mainly concerned with persuading teenagers to avoid unwanted pregnancies. Only Greece and Poland have not adopted any of the measures implemented in the other IPROSEC countries.

OUTCOMES

In the same way that families do not accept policies considered to have pro-natalist objectives, the available evidence suggests that measures aimed at influencing the timing of births by encouraging couples to start raising a family before they are ready for it are not well received and are not effective. The IPROSEC respondents were almost unanimous in rejecting what they saw as coercive government intervention to promote fertility.

While efforts to raise awareness of the risks to health from postponing the age at the birth of the first child appear to be having little impact on age at childbirth, they do seem to be resulting in older women seeking closer medical supervision during pregnancy.

Over the longer term, the number of teenage pregnancies has been falling, though to a lesser extent in the United Kingdom than in Sweden (Council of Europe, 2001 online). Data on teenage pregnancies and abortion rates in Estonia indicate that both rates are declining, although the reasons have not been documented, and the trend in teenage pregnancies runs counter to government objectives. In Spain, where the teenage pregnancy rate is relatively low, and age at first childbirth and all births is relatively high, the explanation given for delaying childbirth is not that women are taking account of policy measures designed to influence the timing of births, but rather that they are considering their own interests. This suggests that the thinking behind policy in Sweden may also apply in other countries.

Family de-institutionalization

Lower marriage rates and postponement of family formation can be explained in part by the development of alternative non-institutional family forms. Unmarried cohabitation has become a widespread practice in Sweden and the United Kingdom, although the rate appears to have peaked in the Nordic states (1994 ECHP data supplied by Eurostat; Kuciarska-Ciesielska, 1997, p. 122; European Commission, 2002c, p. 118; Eurostat 2002c, p. 34). In the southern European countries and Ireland, the overall rates are as low as 1–4%. The IPROSEC candidate countries range between the two extremes, with Poland nearer to southern Europe. For the 16–29 age group, the level had reached 70% in Sweden in line with the delay in age at marriage. In southern Europe, it was much lower for this age group. In France, Italy and Spain, the prevalence of unmarried cohabitation declined among the younger generations during the 1990s. If in the past unmarried cohabitation was seen as a prelude to marriage, with the relationship being replaced by marriage when children were planned, in northern Europe, it is seen as a substitute for marriage and a more enduring form of partnership than previously.

Similarly, divorce has also become less stigmatizing in northern Europe, where it is a widespread practice. The number of marriages ending in divorce has been increasing in all the IPROSEC countries since the 1960s. The rate per 1000 population had reached its highest levels by the turn of the century in the United Kingdom and Estonia though, in both cases, it had fallen by the end of the period (Eurostat, 2002a, table F–15, F–16, J–16; Sardon, 2002, table 10). The divorce rate per 100 marriages had reached its highest level by 2000 in Sweden, followed by the United Kingdom and Estonia, which again both marked a slight fall at the end of the period. In these two countries, more than 40% of marriages contracted in the early 1980s had ended in divorce by 2000. Much lower rates were recorded for both indicators in southern Europe and Poland. In Ireland, where divorce was not legalized until 1996, the rate did not rise as sharply as might have been anticipated.

The spread of unmarried cohabitation and divorce is associated with an increasing number of extramarital births, particularly in Sweden and Estonia, where they account for over 50% of all births (Eurostat, 2002a, table E–9 and J–12). The level falls to single figures in Greece and Italy and is also low in Poland.

According to the available data, a similarly diversified pattern applies for lone motherhood (Estonian Statistical Office, 2002a; Eurostat, 2002a, table E–9 and J–12). By the late 1990s, about 10% of all dependent children were living in lone-parent households, ranging from 20% in the United Kingdom to as low as 3% or less in Greece and Spain. The scant data available for the candidate countries suggest that the rate in Hungary is relatively high, whereas in Poland it is relatively low.

While the proportion of marriages ending in divorce has been rising, so has the number of reconstituted families, as couples repartner and bring with them children from previous relationships. Transitions between different family living arrangements are thus becoming a more common experience, although they are not, as yet, well documented for all the countries in the project. In Sweden, for example, by 1999, 6% of all children aged 0–17 were recorded as living in reconstituted families. In France, the figure was of a similar order. The 2001 census in the United Kingdom showed that 10% of dependent children under the age of 18 were living in step-families (ONS, 2003 online). Already in the mid-1990s, nearly 10% of all marriages contracted in Germany contained a partner with children from a previous union. In Italy, 4.3% of all families were described as reconstituted in 2000/01, of which 61% were married and 39% were unmarried (Istat, 2003, p. 9).

Another living arrangement that has become increasingly widespread as a result of changing patterns of family formation and dissolution is single-person households (European Commission, 1998, pp. 36–8; Eurostat, 2001, table 9). By the year 2000, almost 30% of households were estimated to be composed of a single person, an increase from 25% in the mid-1980s. In 2000, the highest recorded rates were in Estonia and the lowest in Spain.

Despite the development of alternative family forms, the majority of children still grow up in two-parent families. In 1999 in Sweden, 76% of children aged 0–17 lived with their married (55%) or cohabiting parents (21%). In Estonia, 75% of children were living with both parents. In the United Kingdom, 65% of dependent children were living with both their natural parents in 2001 (ONS, 2003 online).

When indicators for delayed family formation (late age at marriage and at birth of first child, late mean age for all births) and family de-institutionalization (low marriage, high extramarital birth and divorce rates) are combined and compared to the EU average at two data points, Sweden was found to have gone furthest in delaying family formation and in adopting de-institutionalized family forms by 2000, as was already the case in the earlier period. France shared this combination of characteristics in 2000, but to a lesser degree (Council of Europe, 1997, table T3.5; Council of Europe, 2001 online; Eurostat, 2002a, tables E-5, E-9, E-10, F-3, F-9, F-15, J-9, J-13, J-12, J-15, J-16). The United Kingdom had outpaced France for the de-institutionalization indicator, but had retained slightly more conventional timing of family formation. Germany shows conventional patterns for both indicators, though they had moved closer to the mean. Italy and Spain remained in the quadrant for delayed family formation and traditional family forms, while Ireland had moved in that direction. Greece combined traditional family forms with conventional family formation throughout the period but had moved closer to the EU15 mean for de-institutionalization in 2000. Two of the candidate countries fall into the conventional-de-institutionalized quadrant, with Estonia displaying the most extreme position, while Poland is most firmly located in the conventional-traditional quadrant.

CHALLENGES

Policy actors, including families, are divided over the question of whether the spread of de-institutionalized family forms should be addressed by governments. Concern is expressed in Germany (among conservative politicians), Greece, Ireland, Italy (among politicians) and Poland, on religious and moral grounds, about the extent to which family de-institutionalization poses a threat to a social order founded on the commitment to the marital bond between heterosexual couples and the married two-parent family.

Everywhere questions have been raised regarding the rights, duties, responsibilities and obligations of family members towards one another in de-institutionalized families. In the countries where alternative living arrangements are most widespread, debate has focused on the rights of cohabiting couples and, more especially, same-sex couples, and of children in relation to their biological parents. In the southern European countries, where alternative family forms are much less common, particularly in Greece, attention has focused rather on changing relationships within marriage. The specific questions addressed in policy are whether and how to intervene to prevent or discourage the development of alternative family forms, and whether to legislate to extend rights and duties to alternative family relationships.

RESPONSES

In most countries, measures are being taken to support the institution of marriage, such as pre-marriage and marriage guidance services, but they are generally provided by religious and civil society organizations rather than the state. Tax incentives are used to encourage conjugal families in Germany, Italy, Estonia and Poland. In Ireland and Poland, where the public is less united in its opposition to government intervention aimed at preventing the development of alternative family forms, and the Catholic Church acts as a powerful restraining force, divorce law is still restrictive. Nor is divorce easy to obtain in Italy.

Most governments are introducing permissive measures to formalize rights and duties within alternative living arrangements, including the creation of legal contracts for unmarried cohabitants in France, Spain and Sweden. Provision of benefits and services for couples irrespective of their marital status is being extended across the IPROSEC countries, but the entitlements of unmarried cohabiting couples are still more limited than those of married couples in Germany, Greece, Italy and Hungary. Government intervention to determine living arrangements was rejected by most respondents in the IPROSEC countries.

Although reconstituted families are becoming a more common and more readily accepted experience, in most countries the legal status of the new parent in reconstituted families has not been resolved. In Sweden, the legal obligations of step-parents in reconstituted families are clearly laid down: biological parents continue to have the right to joint custody. Step-parents can adopt their step-children, although custody cannot be granted to more than two people. Spain and the United Kingdom make some provision for step-parenting, such as shared residence orders in the United Kingdom. In Estonia, step-parents can adopt a child only if the biological parents relinquish their rights.

Formal contracts for same-sex cohabiting couples can be drawn up in France, Germany, Spain and Sweden, although same-sex partners do not enjoy all the same rights as heterosexual couples and, in Estonia, they are described as being invisible as far as social rights are concerned. In Spain, whereas heterosexual couples have the right to choose whether to be taxed jointly or individually, same-sex partners do not have such a choice. The right of same-sex couples to adopt has been accepted in Sweden and the United Kingdom, and in the provinces of Asturias and Navarra in Spain. Elsewhere in Spain, they can adopt individually but not as couples, as is also the case in Estonia.

The rights of children in de-institutionalized families have been addressed in most countries. Everywhere except Germany, Greece and Poland, children have the right to know the identity of their biological parents. A contact veto register is kept in Ireland for parents who do not want to be reunited with their children. In Estonia, the right applies in the case of adoption but not fertility treatment.

Sweden is the IPROSEC country that has gone furthest in introducing policy measures in response to the de-institutionalization of family forms. Measures have been implemented in support of individuals and couples who are adopting non-conventional living arrangements to the extent that these alternatives could be described as institutionalized, since they ascribe rights, duties and responsibilities. The United Kingdom has also introduced a raft of measures recognizing alternative family forms. Spain provides a mixed picture, reflecting variations in policy initiatives in the different autonomous regions. Italy and, especially, Poland have retained more restrictive legislation in their efforts to protect the family as an institution, while Greece is characterized by an almost complete policy vacuum.

OUTCOMES

Prohibitive and restrictive legislation limits the number of divorces, but does not curb the underlying trend towards marital dissolution, as illustrated by Ireland, where judicial separation was authorized before the ban on divorce was lifted, and remains a less costly and simpler solution to the breakdown of marriage.

Proactive measures to promote the formal two-parent married couple are not associated in the statistics with markedly higher marriage rates or consistently lower unmarried cohabitation rates. A few of the younger respondents in France and Poland admitted that they took account of entitlements to benefits and fiscal policy when deciding whether or not to marry.

In countries where de-institutionalized family forms are widespread, particularly the Nordic states, law reform extending rights to unmarried cohabiting couples, same-sex couples, children born out of wedlock or living in reconstituted families has largely removed the stigma associated with extramarital relationships by legitimizing and normalizing the *de facto* situation. In Greece, comments from respondents indicate that social pressure to maintain conventional living arrangements is still very strong and that the public has little appetite for reform.

Many of the IPROSEC respondents felt strongly that government policy should align tax and welfare entitlements of individuals living in non-conventional arrangements with those of married couples as a means of preserving choice. Public opinion continues to be divided over legal reform to recognize same-sex partnerships, as demonstrated by the heated debates leading up to the introduction of cohabitation contracts in France (*pacte civil de solidarité*) in 1999 and Germany (*Lebenspartnerschaftsgesetz*) in 2001. Attitudes towards same-sex couples are slowly changing across Europe. Estonian society is, for example, tolerant of same-sex relationships, but governments prefer to pretend they do not exist.

A vignette on same-sex adoption carried out for the project, based on the British case, demonstrated that, despite law reform, the issue remains contentious in the United Kingdom. It also showed that public opinion in most countries is not yet ready to accept that same-sex couples should be allowed to adopt children.

The development of alternative family forms does not, however, mean the family is no longer a central life value. Data from the 1999/2000 European Values Survey for the IPROSEC countries indicate that for almost 90% of respondents, the family is a central value in their lives (Abela, personal communication, based on weighted cases by country). The percentage saying that the family is 'very important' varies, however, quite markedly between countries, with Ireland and Poland reaching the highest figures at 92%, followed by Italy

with 90%. Sweden, the United Kingdom, Hungary and France all recorded scores close to 90%. Greece and Spain fall below the IPROSEC average with 86%. East and West Germany differed by four percentage points, with 78 and 82% respectively. The lowest figure is registered in Estonia, at 68%, but this does not mean the family is not important since 28% of respondents said it is 'quite important' and none that is 'not important at all'.

Family well-being and security

Reliable time series are not available to enable close tracking of the components of family well-being, security and inequality up to the close of the twentieth century¹. Analysis of data for the EU IPROSEC countries in the mid-1990s suggests, however, that changes in patterns of family formation and structure were contributing to greater heterogeneity of family living arrangements that seemed to be associated with persisting and emerging inequalities between families within countries.

The household types in which individuals are most at risk of falling into poverty in EU member states are those composed of two adults with three or more children (41%) or a lone parent with at least one dependent child (35%) (European Commission, 2002c, p. 126). Large families are most at risk of falling into poverty in Germany, followed by Italy, whereas lone parents with children are most at risk in Ireland, and then in Germany and the United Kingdom. Lone-parent families are least likely to fall into poverty in Greece, where they are, in any case, few in number. Large families are least exposed to poverty in Sweden.

The erosion of institutional family structures has led to closer media scrutiny of relationships within households, resulting in an increase in the reported incidence of domestic violence against women and children. In Spain, for example, nearly 19 000 complaints were lodged about domestic incidents in 1997, and in Greece, one man in four aged 25–35 was found to have beaten his partner at least once. In the United Kingdom, of 224 female homicide victims, 47% were killed by partners. Of 426 male homicide victims, 8% were killed by partners. Of all violent crime experienced by women, 43% is domestic (International Federation of Human Rights Leagues, 1999).

Child abuse within families has been given high media coverage since the mid-1980s, particularly in France, Ireland and the United Kingdom, but less attention has been paid to cases of elder abuse, except in residential homes for older people. One in eight community nurses report having seen abuse of an older person in the United Kingdom. Most cases are by a family member, often the main carer, and in 78% of cases, abuse takes place in the victim's own home (Help the Aged, 2003). In France, 5% of people aged over 65 are reported to have suffered abuse, in 49% of cases by family members (Senate sitting, 08.01.02) and, in Italy, awareness of the issue is growing among NGOs, trade unions (CGIL) and municipal authorities.

CHALLENGES

Concern is expressed in many of the IPROSEC countries, and especially in Estonia, Ireland and the United Kingdom, about growing family insecurity as a result of divorce, separation and lone parenthood, since family dissolution is often associated with poverty and indebtedness.

Some governments are concerned about the loss of control by parents over their children and problems of truancy and juvenile delinquency. These social problems have heightened the debate about the relative merits of universal as opposed to targeted benefits and services for families at risk of falling into poverty.

Across the IPROSEC countries, violence within the home is a topic of growing concern, and in Sweden is being examined by a government task force. Child abuse and physical violence against women in the home have been extensively analysed, but the issue of elder abuse has only recently begun to move onto the political agenda, and is giving rise to concern in France, Germany, Spain, the United Kingdom and, to some extent, in Ireland and Italy. The challenges raised for governments are whether and how to intervene in family life to assist families in promoting the well-being of their members, and to deal with the problems associated with family insecurity and domestic violence.

In several of the IPROSEC countries, concern is expressed about inequalities observed in socio-demographic trends: between the north and south of Italy, East and West Germany, the regions in Sweden and the United

Kingdom, rural and urban areas in the southern European and candidate countries, and Ireland. In France, Germany, Ireland, Sweden, the United Kingdom, Estonia and Hungary, concern is widespread about growing inequalities between ethnic groups. The issue is also moving onto the agenda in southern Europe. The challenge in these cases is how to reduce the disparities in economic and social development between regions and within society.

RESPONSES

Whereas government intervention is not generally accepted when it is believed to be forcing people to take decisions about family formation and structure, few respondents in the IPROSEC countries are opposed to the state intervening to help deal with the consequences of family breakdown, although they do not always have confidence in the available policy measures. Everywhere parents are obliged to maintain their children. The absent parent is pursued after divorce or separation, except in Greece, and failure to observe maintenance obligations can result in fines or imprisonment for defaulters, although in Estonia, the pursuit of the defaulting parent has been relaxed since transition.

France, Germany, Sweden, the United Kingdom, Hungary and Poland support lone parenthood resulting from divorce by making advance payments of maintenance from public funds, if necessary. Family allowances are increased for lone parents in Greece and Italy, although their status is not formally recognized. In Spain, no scheme applies nationwide. A minimum income is guaranteed in France, and a means-tested scheme operates in Ireland. In Italy, the minimum income applies to older but not to young people. A designated benefit is paid to all lone parents in Estonia. In France, Ireland and the United Kingdom, measures including subsidized childcare have been put in place to help lone mothers to become self-sufficient by taking up employment.

The state usually intervenes, where necessary, to provide financial and logistic means-tested support for families as units when their members are in situations that place them at risk of falling into poverty. In the United Kingdom, the Working Families Tax Credit is intended to make families better off in work than on benefits, and a similar scheme operates in France. In Sweden, general support is provided for families through social assistance, and in Estonia the household unit is targeted.

All IPROSEC countries, except Greece, Italy and Poland, operate income redistribution schemes, including national minimum income guarantees. Medical care is provided free of charge or at minimal rates for low-income groups or those without insurance in all countries except Greece and Poland. Housing support is available except in Greece and Spain. Germany has introduced a social care insurance scheme for older people. An integrated approach has been developed to service delivery in France, Ireland, Italy, Sweden and the United Kingdom, for example through one-stop service information points.

In several countries, parents are held responsible for the demeanors of their children and can be punished for losing control over them. Problems of truancy and juvenile delinquency are, for example, being addressed in France by withholding family allowances, and exclusion orders can be issued for disruptive behaviour at school in the United Kingdom and Hungary. Parents can be issued with court orders requiring them to exercise proper control over their children in Ireland. Both here and in Estonia, they can be fined and required to pay compensation for any damage perpetrated by their children. In the United Kingdom, curfews can be imposed on young offenders, and in France, parents can be sentenced by the courts for their children's offences.

Government intervention in family matters is widely accepted when it takes the form of prohibitive and proactive measures, legislation and policing to pursue the perpetrators of domestic violence. Support services, usually provided by voluntary organizations and including help lines, web advisory services and shelters, have been put in place to assist the victims of domestic violence in France, Germany, Ireland, Italy, Spain, Sweden, the United Kingdom, Estonia and Hungary. In Sweden, an ombudsman is being appointed to deal with older people in public care whose well-being may be threatened.

In France, the courts may intervene by appointing a guardian to manage a family's financial affairs, including benefits in cases of debt. Courts can issue protection orders in the United Kingdom and Hungary.

In Sweden, help is given to families to plan their household budget, and the debt may be wiped if they agree to observe strict budgetary arrangements.

Regional inequalities are being tackled using the European Union's structural funds to target resources on less developed areas. National governments in Germany, Italy, the United Kingdom and Estonia are directing resources towards their less developed regions, for example to encourage job creation. The urban-rural divide is being dealt with in Sweden, the United Kingdom and Estonia through schemes to improve rural infrastructures (transport, housing and health services). Many countries provide special services for ethnic minority groups to help them access their entitlements.

All the IPROSEC countries have introduced policy measures designed to support families through periods of crisis, and to protect their members against poverty and other forms of insecurity. Sweden and the United Kingdom provide for all the contingencies listed, and France comes close to doing so. By contrast, Greece has put in place very few policy measures to protect and support families in difficulty, and Poland also only partially covers the various contingencies.

OUTCOMES

A measurable outcome of the provision of financial support for families is the amount of spending on the family function as a proportion of all benefits and the amount received in benefits by families. The first of these measures is not, however, a good indicator of family support since families are also the beneficiaries of all the other categories of transfer payments, which include unemployment, housing and social exclusion, old age and survivors, and health care. The dataset for the EU IPROSEC countries provides a very mixed picture for the proportion of spending on designated family benefits for the period 1990–2000. In Ireland, where the proportion of social benefits devoted to the family function was already highest, it continued to rise. The percentage also rose in Germany, Italy and Spain, although it remained at a relatively low level in the two latter countries. In Greece, France, Sweden and the United Kingdom, it fell (Eurostat, 1998, table C1.3.5; European Commission, 2003, p. 186).

During the 1990s, the social transfers received by families and children by head of population rose across the Union. The highest level was reached in Ireland, followed by Germany, and the lowest level was recorded in Italy. The percentage of persons in households in the EU member states receiving family-related benefits ranged from 63% in Ireland to 4% in Spain and 7% in Italy (European Commission, 2002c, p. 124).

The effect of social transfers on household income is to reduce the proportion of households on low incomes. In the mid-1990s, according to data from the ECHP for the EU IPROSEC countries, it was estimated that poverty rates were reduced by more than 10%, when basic pensions are included in incomes before social transfers. The largest effect was noted for Ireland (15 points) and the United Kingdom (13 points), where the benefits system is designed to redistribute resources selectively to lower income groups. The smallest effect was for Italy and Greece (2 points), where the role of the state is more limited (European Commissionb, 2000, p. 76).

In sum, policy measures targeted at families during periods of family transition or crisis, including advance maintenance payments following divorce or separation, social assistance for long-term unemployed, or lone-parent benefit for never-married mothers, offer a safety net and security for families and help to prevent them from falling into poverty, particularly in northern Europe. They also play a redistributive role, since they are often means tested and targeted, and operate according to the principle of social solidarity. In the southern European countries, governments were strongly criticized for the low level of provision, which is considered inadequate to prevent poverty and is no substitute for family support.

In the candidate countries, the substantial reduction in public policy support and the withdrawal of certain benefits and services for families in the post-Soviet era has had a detrimental impact on family well-being by both creating and fuelling widespread unemployment and poverty. The effect of benefits on family income are said to be negligible, and the low level may serve as a deterrent rather than an incentive to have children. Raising a family is more often than not equated with poverty, and to contemplate having children verges on negligence.

Where governments are intervening in family life to deal with cases of debt and to issue protection orders for children, as in France, the result is that the state is progressively, taking over responsibility for managing the internal private affairs of families through the intermediary of the courts and social services. The outcome of the greater public awareness and concern about domestic violence is that the number of cases being brought before the courts has increased, particularly for child abuse, again bringing the inner workings of family life into the public arena.

Policies to redistribute income between social groups and regions are credited with having a positive impact on income inequalities in some countries, for example between socio-economic categories in France, but they have not eliminated pockets of poverty. Other forms of inequality are becoming more widespread, as for example between work-rich and work-poor families in the United Kingdom. The internal disparities in Italy do not seem to have been reduced. Evidence from the Italian team confirmed that the level of provision of benefits and services was much more limited in the south, to the extent that one female respondent living in a reconstituted family with two children claimed: *'I would never go to the south to be cared for'*.

Hungary provided the clearest evidence of the continuing disparity in the treatment of different ethnic groups by public policy. Several respondents were highly critical of the fact that government support for large families goes essentially to Roma families, who are believed to be exploiting and abusing the system. The notion of the 'deserving poor' was also mentioned by respondents in the United Kingdom, though not specifically with reference to ethnic minorities. In Greece and Poland, ethnic minority groups seemed to be invisible in society, whereas disparities between urban and rural communities were seen as a continuing source of social inequality.

From practice to policy and from policy to practice

This overview of changing family structure and the policy responses adopted by governments as they seek to meet the challenges it creates confirms that family policy, narrowly defined as designated family benefits and services, is not sufficient to cover the range of issues raised. Across the IPROSEC countries, it was clear that individual family policy measures have a limited impact on decisions about family formation or living and working arrangements, whereas bundles of supportive policies can help to create a family-friendly society conducive to family life. In particular, labour market and employment policies were often found to have a greater impact on family well-being than policies specifically targeting family life, particularly in the southern European and candidate countries. Families expect the state to deliver economic security based on a high level of employment and the guarantee of a living wage or minimum income, and to implement responsive and non-intrusive policy measures for families, offering maximum choice and flexibility.

Policy may seek to prevent, reverse or accompany social change. The research confirms that the most acceptable form of government intervention is that accompanying changing family structure and responding positively to social change. Governments need to be aware that prohibitive legislation, even though it may be a reflection of a substantial body of public opinion, as in the countries where religion still has a powerful influence, may do little to help prevent the formal breakdown of the marital relationship. Permissive or reactive policy responses that recognize the *de facto* situation are generally more readily acceptable, for example when they extend the rights of married to unmarried cohabiting couples or ensure that the rights and obligations of couples and children are protected by law, both within couple families and following family breakdown. While public acceptance of state intervention in areas of family life concerned with family formation is fairly low in many of the IPROSEC countries, governments are more likely to gather a broad consensus over the legitimacy of policies to deal with the financial and physical consequences of family breakdown, particularly with regard to the obligations and responsibilities of biological parents towards their children, more specifically following divorce. Public support is stronger still for action to prevent domestic violence and pursue its perpetrators.

Considerable differences were found between and within countries with regard to the issue of providing universal versus targeted benefits to support families at risk. Again, each case needs to be considered on its own merits to find the most appropriate policy response. In the southern European and candidate countries, benefits for families are pitched at such a low level that it is more costly to target payments at the families most in need than to provide universal cover. Moreover, in these countries, benefits are too low to replace income from work as the main source of support for families and to prevent them from falling into poverty.

Universal support for family building (pro-natalism) was sometimes found to be in competition with policies to promote social solidarity and combat child poverty, particularly when the covert aim was to discourage less privileged families from having a large number of children. While conservative governments in Hungary have sought to support middle-class families through tax concessions to encourage them to raise what are described as 'quality' children (non-Roma families), social democrats have pursued policies based on universal child benefit as a means of preventing social exclusion and poverty among low income groups, illustrating how different ideologies can affect policy.

The multiplicity of the issues involved and the heterogeneity of the solutions attempted suggest, in conclusion, that governments would do well to adopt a more integrated, joined-up and co-ordinated approach to family matters by not confining them to a box labelled 'family', and by moving with the grain of social change rather than against it. They could usefully study the impact of public policy in other areas and, more especially, labour market and employment policy on the quality of family life, and seek ways of 'mainstreaming' the family in public policy.

3.7 CHANGING GENDER RELATIONS

Gender is an important cross-cutting dimension of socio-demographic change. Population ageing, changing family structures, educational opportunities and patterns of labour market participation affect the public and private lives of men and women in variety of ways both within and between countries. Although many of the challenges raised by changing gender relations have long been addressed at EU level, societies continue to differ with regard to the solutions adopted and their effectiveness in dealing with the issues they are facing.

In this section, the focus is on changes over the life course, in working patterns and in the work–life balance, that impinge on gender relations in the public and private spheres. As in the two previous sections, socio-economic trends are examined in conjunction with the challenges they raise for governments and the policy measures taken in response to change. Outcomes are assessed, and proposals are explored for improving policy responses.

The gendered life course

Throughout the life course, the experience of men and women is different, whether in life expectancy, education, living arrangements or their representation in public life.

Across the European Union, by the turn of the century, on average women could expect to live six years longer than men (Eurostat, 2002a, tables G–4, G–5, J–18, J–19). Within the IPROSEC EU countries, the discrepancy in life expectancy between men and women is largest in France and Spain, amounting to more than seven years at birth in 2000. An even more pronounced discrepancy is found in the candidate countries, where life expectancy for both sexes is lower: in Estonia the difference at birth between men and women is 11 years and in Poland more than eight years. At age 60, women, across the European Union can expect to live another 24 years and men nearly another 20 (Eurostat, 2002a, tables G–6, G–7, J–20, J–21). Women in France have the longest life expectancy at this age with 25.3 years, and men in Hungary have the shortest life expectancy with 15.3 years.

More men tend to live alone in the 30–64 age group, particularly in Sweden and Germany (European Commission, 2002c, pp. 116, 136). Lower marriage rates, delayed marriage and childbearing, and higher divorce rates, in combination with smaller family size and greater life expectancy than for men, mean that larger numbers of women are likely to be living without a partner or another family member in old age. Across the European Union, some 45% of women aged over 65 were living alone in the late 1990s, compared to 17% of men (Eurostat, 21/2002, figure 2). Among the IPROSEC EU member states, the lowest rates were for men in Spain (13%), and the highest were for women in Germany (about 55%), closely followed by Sweden.

In all the IPROSEC countries except Germany, women outnumbered men in tertiary education by the end of the twentieth century (European Commission, 2002c, pp. 120, 139). In Sweden, Estonia and Poland, over 130 women were in tertiary education for every 100 men. By contrast, in Germany men outnumbered women by 100 to 90. Closer scrutiny shows that men are still more likely to study engineering subjects, and women are in the majority in the social sciences and humanities, law, and health and social work studies (European Commission, 2002b, pp. 155, 159).

Increasingly, women are spending a longer period of their lives – three-quarters of their life span – outside activities associated with childbearing and raising, bringing their availability for activities in public life closer to that of men. Nonetheless, throughout Europe, women continue to be under-represented in public life and in government. Only in Sweden has parity been reached in national government (European Commission, 1995, pp. 195–7, 2002b, p. 81, 2002c, p. 98; IPROSEC partners). In the southern European and candidate countries, women accounted for fewer than 20% of members of national governments at the turn of the century.

Men are twice as likely as women to die during their working life, and men accounted for more than 80% of those registering for treatment for drug problems in Germany, Greece, France, Italy and Spain in 1999. In the United Kingdom, Ireland and Sweden, the proportion was between 70 and 74% (European Commission, 2002b, tables A.37, A.39). Everywhere, men, and particularly young men, are more likely than women to be

involved in crime. In the EU member states for which data are available, over 80% of convicted criminals were men in the late 1990s, and over 90% of those sent to prison. In Spain, men accounted for more than 90% of convicted criminals, but for a smaller proportion of prisoners. The available information for the candidate countries indicates that women accounted for 12% of convicted criminals in Estonia, but under 10% in Hungary. In both cases, less than 5% of convicted prisoners were women (European Commission, 2002b, figures 128–9).

CHALLENGES

In most of the IPROSEC countries, the discrepancy in life expectancy between men and women is a cause for growing concern in a situation where women are more likely than men to be living alone for a longer period, to need more social and medical care and to suffer more from poverty in old age, raising the question of whether policy should be designed to offer additional support to older women, while seeking to improve life expectancy for men.

In some countries, for example France, Germany and the United Kingdom, gender disparities in educational attainment are focusing attention on the underperformance of men. Their greater exposure to health risks, and the high crime rates among young men, particularly in subcultures in some urban areas, are a cause for growing concern. The challenge for governments is whether to use positive discrimination to counteract underperformance and reduce risk-taking behaviour among boys and young men, at the same time as trying to prevent young women from adopting habits that expose them to health risks.

The issue of the low representation of women in public bodies and in government is being raised in most countries, including Sweden, where women are more equally represented. The challenge for governments is how to encourage more women to enter and remain in public life.

RESPONSES

For most governments, the problems associated with old age have not been considered as gender issues. Gender inequality in old age has not, therefore, been addressed directly by specific measures targeting women, although a number of instances can be found of measures that are more likely to apply to women than men. In several of the IPROSEC countries, some form of pension credit is provided in recognition of time spent out of the labour market performing caring tasks. In Sweden, up to four years can be credited, and time spent in education and carrying out military service is also counted. In the United Kingdom, time spent caring for children under five or for older and disabled relatives is credited for pension entitlements. In Estonia, women are allowed five extra years of pensions credits for every child, and periods of parental leave are also included. In Ireland, time spent out of the workforce to care for family members qualifies as pensionable service.

One example was found in France of a widowed judge taking his case to the European Court of Justice (Case Griesmar, C–366/99, 29.11.2001). He was claiming unfair treatment in social security on the grounds that he should be entitled to receive pension credits for time spent raising his three children, on the same basis as female civil servants. The case was upheld, and French law is being revised to specify that entitlements apply to both men and women.

To redress the imbalance in the performance of men and provide male role models for boys, recruitment drives are being used to attract more men into teaching in France, the United Kingdom and Sweden, where reference has to be made in job advertisements to the under-represented sex. Sex streaming in schools, as practised in the United Kingdom, is under consideration in France. Media campaigns in France and the United Kingdom are targeting boys and young men to make them aware of risks from smoking, substance abuse and accidents. The high crime levels among young men are being addressed through more intensive policing of high risk areas and through efforts to involve offenders in community activities in France and the United Kingdom.

Measures to attract more women into public life include media campaigns in France, Germany, Sweden, the United Kingdom and Estonia. Quotas have been introduced for candidates at parliamentary elections in France, Germany and the United Kingdom. In Sweden, quotas were also introduced for a short time in higher

education to increase the proportion of female professors. Another approach has been to institute more family-friendly arrangements, such as daytime meetings for public bodies in France, Germany and the United Kingdom. A Women's Round Table is being used in the Estonian Parliament to attract more women into politics.

A summary of policy measures shows that France, the United Kingdom, Germany and Sweden have gone furthest in implementing measures designed to redress the imbalance between men and women, where appropriate, through positive discrimination. By comparison, relatively little action has been taken in the southern European and candidate countries, where gender issues are not considered as a priority.

OUTCOMES

Measures recognizing time spent out of the labour market are contributing to improved pensions, but they do not appear to be helping older women who do not have a sustained employment record. The evidence for the EU IPROSEC countries is that women aged over 67 are more likely than their male counterparts to be at risk of continuous poverty, except in Spain. The disparity is particularly marked for older women living alone, this time including Spain (European Commission, 2002b, table A.53, A.54).

The effectiveness of measures being taken to improve the performance, motivation and behaviour of young men has yet to be demonstrated, but there is some evidence to suggest that young women are more often adopting risk-taking practices, for example with regard to smoking and drugs. In the United Kingdom, in 2000, no significant difference was found between the proportions of boys (25%) and girls (23%) who responded positively to survey questions about whether they drank alcohol. Since the 1980s, between the ages of 13 and 15, girls have become consistently more likely to smoke than boys. In 2000, 12% of girls under 15 were regular smokers, compared to 9% of boys, although they smoked fewer cigarettes (ONS, 2001).

More women are being attracted into public life in northern European countries, where campaigning is most active and where awareness of opportunities for women is greatest, although parity is far from being achieved. In southern Europe change is very slow, and in the candidate countries, the situation would seem to have deteriorated.

Gendered working patterns

Awareness of gender issues is much greater with regard to employment and the workplace. Within the European Union in 2000, women took more than half the new jobs created, particularly part-time jobs in the service sector. As a result, the overall employment gender gap for the population of working age fell to 18.5 percentage points in 2000, compared to 26 points in 1990. The smallest employment gap in 2000 for men and women of working age was 3.8 points for Sweden and the widest was 30.2 for Greece. In some countries, for example Sweden and the United Kingdom, it is anticipated that women could outnumber men in 2010 (European Commission, 2000a, p. 85, 2001, pp. 110–33).

While employment rates have generally been increasing for women in the European Union, bringing them closer to those for men, in the candidate countries and East Germany, rates for both women and men fell sharply during the 1990s. The gender employment gap, which was previously relatively small, was further reduced in Estonia between 1995 and 2000, since rates fell more for men than for women. Among the IPROSEC countries, by the end of the 1990s, women accounted for over 44% of total population in employment between the ages of 25 and 54 in France, Germany, Sweden, the United Kingdom and the three candidate countries, and for 41.5% in Ireland and 37.5% or less in Greece, Italy and Spain.

While rates for men aged 25–54 remained fairly stable in the EU IPROSEC countries, or fell in the case of Greece, between 1995 and 2000, they increased for women (European Commission, 2001, pp. 11–33). By 2000, Sweden was recording the highest female employment rate for this age group, at 81.7%, compared to 85.8% for men. Spain reported the lowest rate for women, with 50.7%, compared to 85.4% for men. In the IPROSEC candidate countries, male rates were lower than in the EU member states, whereas female rates were relatively high for Estonia, and above the EU15 average for Hungary. Rates fell in Estonia and Poland in the late 1990s.

Educational attainment affects women's employment rates. Across the Union, women with higher levels of education are more likely to come closer to male patterns of employment than women with lower levels of attainment. In Italy, where education seems to have the most marked effect, 78.8% of well-qualified women are in employment, compared to 37.7% of women with low levels of qualification (Eurostat, 2001, table 14). The disparity is least marked in Sweden (85.5% and 63.5%).

Dual-earner couples became increasingly common during the 1990s (Eurostat, 9/2002). Eurostat data suggest that, by the end of the 1990s, in the northern European IPROSEC countries, two-thirds or more of all couples with at least one wage earner were dual earners by the end of the decade, compared to less than half of couples in the southern European countries. The proportion of dual earners ranged from just above 40% in Greece to nearer 80% in the United Kingdom. Ireland, starting from a low base, experienced the most rapid increase in the proportion of dual earners during the 1990s. On average, the rate was 20% higher for women with tertiary education than for women with only compulsory schooling. In Italy and Spain, it was more than 40% higher for well-qualified women.

While the employment gap between men and women has been closing, pay differentials have remained considerable. They do not necessarily reflect the disparity in employment rates (European Commission, 2003, p. 164; Eurostat, 2002c, p. 418, KSH, 2001, p. 115). By the late 1990s, female earnings came relatively close to those of men in Sweden, but they were closest of all in Italy, and the largest earnings gaps were found in the United Kingdom and Ireland. Between 1995 and 1999 the pay gap decreased in France, Germany, Greece and the United Kingdom, but it increased in the other IPROSEC EU member states. In the candidate countries, women are more evenly distributed between job categories and in the occupational hierarchy than in EU member states. In the past, pay differentials between women and men were generally smaller than in the European Union. During the 1990s, the gap widened in Estonia from 20% in 1992 to 26% in 1998. In Hungary, although the overall gap widened, it narrowed from 31 to 24% for well qualified workers, and from 34 to 7% for workers with a low level of education (KSH, 2001, p. 118).

Reliable data on undeclared work are difficult to obtain for obvious reasons. Some estimates in the late 1990s put the level of undeclared work at between 7 and 19% across the European Union (COM(98) – 219), whereas others reported figures as high as 23% in Spain and 27% in Italy (Mateman and Renooy, 2001, table 9.1). In the southern European and candidate countries, large numbers of women and men are believed to be working in the informal economy, particularly in personalized services. Government estimates are always much lower than independent sources: for example 1.5 compared to 13% for the United Kingdom, and 3 compared to 19.5% in Sweden.

The attitudes of men and women towards work are broadly in line with working practices. According to the 1999/2000 European Values Study, women in the IPROSEC countries attach less importance to work than men: in 1999/2000, 54% of women considered work as very important in their lives, compared to 61% for men (analysis of the 1999/2000 European Values Study by A. Abela). The most marked differences were found between men and women in West Germany (not shown separately in the graph), the United Kingdom and Ireland, whereas gender appears to make very little difference to attitudes in France, Estonia and Hungary. Only in Greece and Sweden, do women attach more importance to work than men.

CHALLENGES

The integration of women into formal employment has become an important issue for debate in the IPROSEC EU member states in the context of declining birth rates, an ageing labour force, skills shortages and strong economic imperatives. All the IPROSEC countries are committed to introducing national legislation on equal pay and treatment. Concern is expressed about the effectiveness of the law and the cost of implementation for the state and employers. Although all EU member states have signed up to legislation to prevent discrimination in access to training and employment, unfair dismissal on grounds of maternity and sexual harassment at work, here too the unevenness of implementation is a cause for concern.

The challenges for governments are, therefore, how to strike a balance between the need to maintain and widen the fiscal base, generate a flexible labour force, and use the available skills to the full. They are also being called upon to prevent discrimination on grounds of sex in employment, to look for ways of funding

equality legislation and ensuring more effective implementation, while supporting women as working mothers.

RESPONSES

Under EU law and according to the employment guidelines, governments have made a formal commitment to increase employment rates among women, thereby maintaining and broadening the fiscal base. Incentives are being provided in all EU member states and in Hungary, through (re)training schemes and support services, to enable more women to enter and remain in the labour force. Reinstatement of women returners is mandatory after maternity and parental leave in all EU member states and the candidate countries, though not necessarily in the same job and with wide variations in actual practice.

Maternity leave is usually conditional on previous employment. It is funded through social insurance contributions in all the IPROSEC countries. Benefit is paid during parental leave in Germany, Italy, Sweden, Estonia, Hungary and Poland. In France, the childrearing benefit is financed by the family insurance fund. In Germany, *Erziehungsgeld* is dependent on the family's income and, in Poland, it is means-tested. Employers in France, Italy, Sweden, the United Kingdom, Estonia and Hungary are expected to meet the cost of replacements recruited during the leave period. In Spain, employers' social insurance contributions are reimbursed if they recruit a replacement worker who had previously been unemployed.

Across the IPROSEC countries, working conditions are more strictly protected and monitored in the public sector. In France, Spain, the United Kingdom and Estonia, domestic service jobs have been regulated to bring employees into the formal labour market and ensure they are covered by social insurance.

Governments in France, Ireland, Sweden and the United Kingdom have developed formal structures for monitoring gender equality and for hearing complaints. In France, Spain, Sweden and the United Kingdom, the cost of policing and of bringing cases of sexual discrimination and harassment before the courts may be met from legal aid.

A summary of the measures introduced in response to gendered working patterns shows that several countries have implemented both the letter and the spirit of EU law to protect women as working mothers and prevent discrimination against them in the workplace.

France and Sweden appear to have gone furthest in attempting to reduce inequalities in the opportunities and treatment of men and women in public policy, closely followed by the United Kingdom. Poland and Greece are the countries where gender equality issues appear to have received least attention.

OUTCOMES

The countries in northern Europe that are implementing and policing measures to encourage more women to enter and remain in employment are generally those where the gender employment and pay gaps are closing. Public opinion is not, however, necessarily in favour of state intervention, even on equality grounds if it appears to be forcing everybody into work. Pressures on women to take up employment are creating tensions in countries such as Ireland where women were, in the past, expected to concentrate their energies on their mothering tasks.

In many countries, the public sector has become an attractive employer for women because it is widely seen as gender aware. Public sector employment is found, however, to reinforce gender segregation in employment and disparities in pay since public sector jobs, though more secure, are generally less well paid, and it is almost exclusively women who avail themselves of the opportunities to adapt their working patterns. Where domestic and services jobs are regulated and protected, more of the work done by women has been brought into the formal employment sector, but again the jobs involved are low status and poorly paid.

Where employers are able to offset the costs of maternity against insurance concessions, they are likely to be less hostile towards the employment of women. When this is not the case, particularly, in the candidate countries, instances were quoted of blatant discrimination.

Employers in countries with effective systems for monitoring, policing and sanctioning gender discrimination in recruitment, training and employment are more likely to be aware of gender policies and to implement them. Respondents in France, where working arrangements are tightly controlled, were divided over whether employers should take responsibility for work–life balance measures. Even where, as far as the law is concerned, policy seems to provide reasonably good protection for working mothers, implementation and monitoring were found to be very uneven across the IPROSEC countries.

The gendered work–life balance

The relationship between work and parenthood is particularly relevant to the analysis of changing family structure and public policy. In Section 4, it was shown that the value attached to family life varied between the IPROSEC countries. Although large disparities between countries remain, analysis of attitudes by gender provides a more differentiated picture. Overall, women are more likely than men to attach a high value to family life, although the gap between the sexes is smaller than for the importance attributed to work: 89% of women claim that the family is ‘very important’, compared to 84% for men (analysis of the 1999/2000 European Values Study by A. Abela). The gender difference between the sexes is much greater in Estonia, though values for both men and women are the lowest in the graph. Swedish men and women also display a considerable measure of disagreement for this indicator. Swedish women are found to be the strongest supporters of the family among all the IPROSEC countries. The smallest differences are registered between men and women in Ireland and Poland, where more than 90% of respondents of both sexes state that the family is ‘very important’. Germany and Spain both record lower levels of support among women, but over 80% of women still select the ‘very important’ option.

Women today are less likely than in the past to leave the workforce when they marry and have children, although employment rates are found to vary in EU member states according to the number and age of children. The presence of children is associated with a fall in dual earning in Germany, the United Kingdom, Ireland and France, but with a rise in Greece and Spain. In Italy, the level remains unchanged (Eurostat, 9/2002, figure 3).

In both 1995 and 2000, the number of children seems to have a depressing effect on mothers’ employment rates in Germany, Ireland and the United Kingdom for the first child (Eurostat personal communications, 1998, 2003). Employment rates are affected in all countries as the number of children increases, but the smallest effect is found in southern Europe. In Sweden, the employment rates of women working 35 hours or more a week decrease with the number of children, but the proportion of women working 20–34 hours a week increases with family size for women living with a partner (SCB, 2000, table 8.1).

Age of children also has an impact on women’s employment rates, but less so in 2000 than in the early 1990s (Rubery *et al.*, 2001, table A1). Whereas men with children aged 0–6 are more likely to be in employment than men without children, the reverse is true for women. As children reach primary school age, the employment rates of mothers increase, particularly in Germany and the United Kingdom. The difference is very small in Greece, Italy and Spain, and the rate falls in Ireland. In Sweden, most mothers are on parental leave when their children are under the age of one. Employment rates then rise steeply and reach 85% by the time children are five (SCB, 2000, table 8.1).

In all the IPROSEC countries except Italy and East Germany (not presented separately in the graph), men are more likely than women to feel strongly that ‘children suffer if their mothers go out to work’ (analysis of the 1999/2000 European Values Study by A. Abela). No difference is found between the sexes in Estonia and Hungary. The view that children with working mothers suffer is most strongly held by men in Greece and West Germany. Female respondents in Sweden are most likely to disagree strongly with the proposition, followed at some distance by French women.

Among the IPROSEC EU countries, most dual-earner couples are employed full time. The proportion is generally lower for couples with children, but is very small in Spain. The 1.5 (one full-time and one part-time earner) pattern is less common among dual earners in the southern European countries, than in France, Germany, Ireland and the United Kingdom, implying that women tend not to work rather than working shorter hours (Eurostat, 9/2002, table 1).

Within the IPROSEC EU member states, female part-time employment rates range from almost 45% in the United Kingdom, where relatively large numbers of women are in the labour force, to 7% in Greece, where relatively small numbers of women are in formal employment (European Commission, 2000a, pp. 85–100; 2001, pp. 110–33; IPROSEC partners). In the candidate countries, few women work part time: the highest rates are in Poland with 13%. In these countries, both men and women work long hours, and the difference in working time between the sexes is smaller.

Everywhere in the European Union except Sweden and Italy, women with children work shorter weekly hours than women without children. The difference, at six hours or more, is most marked in Germany and the United Kingdom, where part-time rates are relatively high but the number of hours worked is relatively low. When working time preferences are compared with actual working hours, women with children would everywhere prefer to work shorter hours than they are currently doing, although the reduction in Spain would be relatively small (Bielenski *et al.*, 2002, table 25). Women in Ireland are seeking the largest reduction. Women without children would also prefer to work shorter hours, with women in this category in the United Kingdom looking for the largest reduction.

Among the EU IPROSEC countries, the dominant dual-earning working pattern in France is for both partners to work medium-length full-time hours, irrespective of whether they have children. In Sweden, the pattern is similar, but a larger proportion of women work part-time hours, most often long part time (Eurostat, 19/2002, 20/2002, table 2). In Germany and the United Kingdom, the model shifts for parents from two long (United Kingdom) or medium-to-long (Germany) full-time jobs without children to long (United Kingdom) to medium (Germany) male hours and shorter female hours with children. In the southern European countries, children have little impact on the long (Greece and Spain) or medium (Italy) hours of men and women (Rubery *et al.*, 2001).

Across Europe, irrespective of their employment status, women continue to perform a larger share of domestic tasks than men. Over 80% of employed women claim they have the main responsibility for housework and shopping, and 45% perform child and elder caring tasks, compared to 20% of employed men for housework and 25% for caring (Fagan and Burchell, 2002, p. 27). When asked 'How often are you involved in any of the following activities outside work', nearly 63% of women say they spend at least an hour a day performing housework, compared to under 12% of men (European Foundation for the Improvement of Working and Living Conditions, 2003, personal communication). Nearly 41% of women spend an hour or more every day caring for children, compared to just over 23% for men. In the IPROSEC countries, women in Italy reach the highest scores for housework, and men in Greece mark the lowest scores. The largest proportion of women caring for children on a daily basis is in Estonia and the lowest proportion is for men in Greece. Caring for elderly or disabled relatives is most frequently reported in by Estonian women, and least frequently by French men. These data must, however, be treated with caution as questions may have been phrased differently, and involvement in household tasks is not always accurately reported.

When different measures of equality of opportunity and treatment during the life course (women in tertiary education in relation to men, GDI ranking for equality of opportunity, representation in government and parliament) against indicators for work–life balance (employment rates, full/part-time working hours, the distribution of caring and household tasks), and plots them in relation to the EU average at two data points. Sweden and France are found to be the only IPROSEC countries combining positive rankings on both indicators over time, and Sweden stands out clearly from the other countries (European Commission, 1995, pp. 195, 197, 2001, pp. 110–33, 2002b, p. 81, 2002c, pp. 98, 120, 139; European Foundation for the Improvement of Living and Working Conditions, personal communication, 2003; Eurostat, 1995, table 73, 2001, table 45, 19/2002, table 2, 20/2002, table 3; United Nations Development Programme, 2000). The United Kingdom moved into the quadrant for gender equality and work–life balance in 2000. None of the IPROSEC countries is represented in the quadrant for gender equality and work–life imbalance. Hungary and Estonia are located in the quadrant combining work–life balance with inequality of opportunity for both dates, and Poland moves away from the mean in this direction by the second data point, while Germany moves in the other direction closer to the mean. The southern European countries and Ireland remain firmly located in the quadrant for low inequality and work–life imbalance, with Greece staying in the same position between the two data points in relation to the EU15 mean. The graph confirms the different patterns emerging from the data assembled for the project. Read in conjunction with the tables of measures for each country, it is suggestive of possible linkages between policy and practice.

CHALLENGES

As more mothers have entered and returned to the labour force after periods of leave and as their children grow older, a major issue for public debate across Europe has been the reconciliation of family life and employment and the balance between employment and other activities for both men and women. Concern is widespread about the inadequacy of care facilities and working arrangements, as well as unsocial working hours. The challenge for governments is, therefore, how to promote a more equitable work–life balance for both men and women.

The impact of socio-demographic change on the sharing of domestic tasks, and more especially care work, has become an issue for public debate in many countries with the introduction under EU law of entitlement to parental leave for men and the recommendation on childcare. Governments are, thus, being called upon to introduce measures to encourage more men to become involved in caring work.

RESPONSES

Governments in France, Germany, Sweden and the United Kingdom, in particular, have been seeking to encourage employers to promote a family-friendly workplace, using the public sector to introduce innovative practices, such as job sharing, term-time working, flexible working arrangements, teleworking, workplace crèches and stress counselling. In France, Germany, Sweden and Estonia, the private sector is also required to operate family-friendly practices. In Italy, the state offers financial incentives for workplace crèches in the private sector.

In the United Kingdom, governments have argued the business case for work–life balance in partnership with industry. They have launched campaigns to encourage employers and employees to change working practices and attitudes towards balancing work and non-work activities to the advantage of both men and women. The Department of Trade and Industry (DTI) in the United Kingdom has produced a series of publications with titles such as *Creating a Work–Life Balance: a good practice guide for employers*, and the *Business Case for Work–Life Balance*, as well as launching a Work–Life Balance Fund to provide consultancy advice to firms to help them introduce changes that will benefit both their business and their employees. In Sweden, promotional campaigns are organized in industry and, in Ireland, a family-friendly website newsletter has been launched, and a family-friendly workplace day was established in 2001. In Estonia and Hungary, awards are made to employers for creating a family-friendly workplace.

Governments in France, Germany, Ireland, Sweden, the United Kingdom, Estonia and Hungary are committed to ensuring adequate provision of good quality affordable child and elder care. In Germany and the United Kingdom, the voluntary sector is closely involved in delivery. Ireland, Italy, the United Kingdom and Poland are developing public–private partnerships, with a view to reducing the cost for public funds.

In Greece and Estonia, more emphasis is being placed on day-care provision for older people than on childcare. In France and Germany, tax relief is available for childcare, and the social insurance charges for approved childminders are covered in part or in full from public funds. Long crèches opening hours and after-school care are widely available in France, Sweden, Estonia and Hungary to enable both parents to combine their working hours with childcare (see also Table 6.4).

The 35-hour week and annualized hours are being used in France to reduce working time for both men and women. Part-time working conditions are regulated, and part-time workers are protected by social insurance on a pro rata basis. By contrast, low paid short part-time hours in the United Kingdom and workers earning under 400 euros a month in Germany are exempted from social insurance contributions. Reduced working hours for women returners are being introduced in many countries. In Sweden, working time can be reduced by up to 25% for as many as eight years to enable parents to spend time with young children, or they can take extra days of leave. In Greece, hours can be reduced for up to two years, and in Hungary for the first nine months after the birth of a child. Extra days of paid holiday leave are provided for parents in Estonia.

In countries such as the United Kingdom and, to some extent, in Germany and Ireland, where long male working hours are often matched by short part-time female hours, and by unsocial working time, particularly in the United Kingdom with the move towards the 24/7 week, governments are using the business case to

present the advantages of shorter hours, flexi-time, staggered, compressed hours and annual hours for both employers and employees.

In northern Italy, schemes have been introduced to make opening hours of schools, shops and services, and the provision of public transport more amenable to work–life balance, which is a major demand among women in most of the IPROSEC countries.

To encourage greater involvement of men in parenting and their presence at the birth of their children, in all the IPROSEC countries men are entitled to take paid paternity leave. In Estonia, internet chat rooms are provided for fathers. In line with EU legislation, all countries make available part of the parental leave period for men, but the length varies substantially between countries. Campaigns have been organized in Sweden to change attitudes at the workplace towards men taking leave for family reasons, for example by making full leave entitlement conditional on take up by men.

A summary of policy measures shows that, among the IPROSEC countries, France and Sweden, closely followed by Italy, the United Kingdom and then Estonia and Hungary, have been most active in formulating policy measures to help families achieve a more equitable work–life balance. Greece and Poland are once more the two countries where policy makers appear to have been least preoccupied with issues of gender equity, and Spanish governments seem to have paid less attention to work–life balance than to other areas of gender policy.

OUTCOMES

The effect of the imposition of strict regulatory frameworks to control leave arrangements and working practices has meant that employers in some countries have developed avoidance strategies, which militate against the achievement of greater gender equality in work–life balance.

The introduction of less rigid practices, worked out in partnership between unions and employers at the level of the workplace as human resource policies, are, by contrast, proving to be effective in promoting equality of opportunity, more especially among the better qualified workforce. Many leading companies in the United Kingdom pride themselves on being good employers, offering benefits that go beyond statutory requirements, in their own and their employees' interests (DTI, 2002).

As illustrated by the Swedish case, even strong incentives to improve the take up of parental leave by men are not sufficient to change attitudes towards caring roles. In the public sector, where working conditions are generally considered to be woman friendly, the effect has not been to make the work–life balance more equal between the sexes.

Time policies, even though they may be formulated in response to employment issues, can, as demonstrated by the French case with the reduction of working hours, have a beneficial effect on family life by making paid work and family activities more compatible for both men and women.

Surveys in France show that the majority of workers feel they have benefited personally from the reduction in working time and its restructuring. Parents with young children and with regular secure jobs are among the most satisfied. They claim they are better able to match their working hours with childcare and school hours, making it possible more often for parents to look after their own children and, thereby, save on childcare costs (Fagnani and Letablier, 1993).

Elsewhere, inadequate public support for work–life balance is still seen as a major issue for couples in the organization of their daily lives and as a source of gender inequality, reinforcing the traditional distribution of roles. In some cases, this distribution of household labour is contested, resulting in conflict and bitterness

As indicated throughout this section, opinions differ between and within countries about the extent to which couples are able to choose how much weight they give to paid work and family life and how they use, or would like to use, any choices offered to them. For many people, choice brings its own dilemmas.

Ambivalence of policy and practice

This section has demonstrated the importance and the complexity of the changing shape of gender relations from one country to another and also within countries, emphasizing the need for careful monitoring of local situations. Despite gender mainstreaming at EU level and the large body of European law on equal opportunities, differences in socio-economic conditions and in policy styles have resulted in marked discrepancies in legislative frameworks and in implementation at national and subnational level. The evidence is that strict implementation of legislation and public sector initiatives may have negative effects for women, who tend to become even more concentrated in the low-pay sector. Policy actors cannot, therefore, afford to be complacent. For the candidate countries, it is clear that the cost of introducing gender legislation is proving to be prohibitive. Both here and in the southern European countries, gender issues have not been addressed to the same extent in public policy, and employers appear to be discriminating against women to avoid the costs associated with implementing existing legislation to protect women as mothers.

Analysis of the question of the balance between employment and other activities for both men and women reveals tensions between policy objectives and within families. Women are under growing pressure to increase their labour market participation, while at the same time being expected to produce children, stay at home to raise them in their early years and then subcontract childcare as they grow older. Men are under pressure to become active fathers, to share household tasks and maintain children financially if the couple relationship breaks down. Paid parental leave may be considered as a means of enabling parents to exercise choice about whether they care for their own children when they are young, and/or as a form of social recognition of the value of parenting, but it may also be interpreted as confirmation of women's homemaker role and a means of restricting their employment opportunities. Either way, it is not gender neutral, and choice may be illusory. Efforts to involve men more centrally in childcare through legislation on parental and paternity leave have, as yet, been relatively unsuccessful, since they are contingent on a more fundamental shift in attitudes and power relations both at work and in the home than has yet been achieved.

The various working arrangements implemented in the IPROSEC countries were found to affect the ability of men and women to achieve a more equitable work-life balance. Attitudes towards worktime flexibility, including part-time work, differ markedly from one country to another. Reductions in working hours for parents and short full-time working hours are widely seen as a desirable solution to the problem of juggling the schedules of family members, but they confirm the traditional gendered distribution of caring and household tasks, unless they are taken up equally by both men and women. They also entail the need for more effective synchronization of opening times for schools, shops and other services, as well as appropriate provision of public transport, requiring joined up, or lateral, policy thinking. These issues are much less salient in the candidate countries, where the major preoccupation of couples is to find, and retain, secure well-paid full-time employment in the formal economy before being in a position to embark on family life. In sum, it is not sufficient to focus on specific equal opportunities policies or to mainstream gender issues. The observations made and the comments reported in the interviews suggest the need for a more holistic and integrated approach, extending across employment policy, working practices and time structures for all individuals throughout the life course.

3.8 CHANGING INTERGENERATIONAL RELATIONS

Population decline and ageing, changing family structures and gender relations have all had an impact on relations between the generations, creating difficult challenges for governments in a context where they are seeking to contain public spending. The configuration of the factors impinging on the experience of intergenerational family life varies between clusters of countries and also within societies. Policy responses are contingent on the way in which the state conceptualizes the duties, obligations and responsibilities of family members and on the perceptions that family members have of the acceptability of public policy intervention in their relationships (Millar and Warman, 1996; Arber and Attias-Donfut, 2000). This section explores the changing intergenerational dependency balance and intergenerational relationships, as reported in the statistics, in terms of the challenges facing society in the twenty-first century, the policy responses formulated and implemented by governments, and their outcomes, leading on to proposals for improving policy responses.

The changing intergenerational dependency balance

The process of population ageing, as described in the third section of this volume, has had an impact on the balance in the age structure. Since the 1960s, the size of the population aged 60 and over has been growing constantly, while that of the population aged 0–19 has been declining (MISSOC, 2001 online). The proportion of the population in the intermediate category – often referred to as the population of working age – grew between 1970 and 2000, due in part to the baby boom of the postwar years, but is set to decline over the coming decades. The young age population is expected to continue to fall, in line with lower fertility rates, whereas the old age population will continue to rise as the baby boomers reach retirement age, and life expectancy increases. The net result will be that, from 2030, the old and young age population – the dependent population – will outnumber the population of working age. This intermediate age group includes a large proportion of non-workers, due to delayed labour market entry, early labour market exit, unemployment and other forms of inactivity such as that among women who are homemakers. The ‘burden’ of contributing to the state’s budget through taxes and social insurance payments, therefore, falls disproportionately on a relatively limited number of workers, amounting to about 42% of the EU15 population in 2000 (European Commission, 2001, p. 110).

The dependency ratio is not constant over time and from one member state to another (United Nations, 2002 online). During the 1970s and 80s, the imbalance in favour of the population aged 0–24 and over 60 was greater than in 2000. In the 1970s, however, when life expectancy was lower, younger people spent less time in education, and older people tended to remain in the labour force until a later age, thereby mitigating the combined impact on the population of working age, despite the lower levels of economic activity among women in the EU member states. Throughout the period 1970–2000, the population aged 0–24 and over 60 accounted for 50% or more of total population in all the IPROSEC countries. In Ireland, the level was over 60% for the earlier period. By 2000, Germany, Italy and Spain were reporting the largest proportion of their population in the working age category. By 2025, in the EU IPROSEC countries, the proportion is expected to decrease as population ageing outweighs the effect of low fertility, with Sweden, Germany and Italy being most affected by the growing population imbalance. In the three candidate countries, the proportion is set to continue to decline, due to relatively low completed fertility rates combined with low life expectancy.

The main difference between dependency ratios in earlier periods and in the future is that, whereas in the past, the imbalance was due to the larger young age population, in the future it will be due to the larger old age population. The issues associated with dependency are not the same for these two categories of dependants. The country with the largest proportion of total population in the young age dependency category, as a percentage of the population of working age, was Ireland with 56.8% (Eurostat, 2002a, tables C–9, C–10). At the other end of the age spectrum was Italy with just 35.2%. Old age dependency was most marked in Italy and Greece, with 42.5 and 42% respectively, while Ireland recorded the lowest level with 27.9%. The age dependency ratio was more heavily weighted towards the younger population in the candidate countries due to low life expectancy.

CHALLENGES

The shifting age balance resulting from the combined impact of population decline and ageing raises concerns for governments about the capacity of the population of working age in employment, who are producing wealth and paying taxes, to pay for the needs of the young and, more especially, the fourth-age (80+) older dependent population groups, who are primarily consumers of goods, benefits and services. The challenge with regard to intergenerational dependency is how to manage the impact on the labour force and on government spending of the growing imbalance in dependency ratios.

RESPONSES

Section 3 of this volume examined government responses to the problems created by population ageing for national budgets. Attention here is focused on policies designed to manage dependency in a context where governments in EU member states are committed to national strategies for promoting solidarity between and within the generations (COM(99)221 final 1999), while also being under an obligation to control public spending. Governments are pursuing these strategies at the same time as EU policy has been shifting towards the concept of activation aimed at promoting employability among the underemployed sectors of the population. In the IPROSEC EU member states, the emphasis since the mid-1990s has been on implementing childcare strategies to enable women with children to participate fully in the labour force and, increasingly, on schemes to reduce the dependency of older people on the working population by enhancing and extending their employability.

Broadly speaking, the need for public childcare provision is greatest in countries with high proportions of women in employment and working full-time or long part-time hours, as in France and Sweden, and lowest in countries where few women are in employment or part-time rates are low, as in the southern European countries, although it is often argued that the lack of childcare provision is preventing more women from taking up employment. In Ireland and the United Kingdom, where policy development has concentrated on measures to reduce reliance on benefits, particularly among lone mothers, the improvement in public provision of childcare services is intended explicitly to enable more women to enter employment, the more so if they are dependent on welfare. In France, Spain and Sweden, places in public childcare are restricted to mothers in work.

Public childcare is provided for almost half of all children under the age of three in Sweden, and for almost 30% of the same age group in France, followed at lower levels by the United Kingdom and then Hungary and Germany (Eurostat, 1997, figure C5, 2002c, pp. 87, 400; OECD, 2001 (online); Estonian Statistical Office, 2002b). In most cases, children under the age of one are cared for by their mothers, particularly if they are entitled to paid parental leave and, as in Estonia, no data may be collected for this age group. In Sweden, 51% of one year-old children are in public childcare, compared to 78% of three year olds, and in Estonia 12.5% and 74.6% respectively. In the other IPROSEC countries, provision is very low for children under three, and in Greece, Ireland and Poland is close to zero. It is much higher for pre-primary education, reaching 100% in France, and Italy by the end of the century and close to 100% in the United Kingdom for children aged four.

In France, places in public crèches are available for all children with parents in work at a cost based on income, and some crèches operate on a 24/7 basis. In Sweden, all children aged 1–12 are entitled to a place in public childcare at a fixed cost, covering crèches, pre-school and after-school care. In the candidate countries, the formerly generous provision of childcare has been dramatically cut back since transition, particularly with the closure of many workplace crèches. In Estonia, for example, the 24-hour crèches available during the Soviet era have been closed. Local authorities are obliged to provide places in crèches for all children needing them, and charges are capped, but facilities are not regulated by the state.

In Germany, where public childcare is more limited, provision relies heavily on the voluntary sector. In the United Kingdom, places in publicly provided crèches are confined to low-income earners and are conditional on mothers taking paid work. In both the United Kingdom and Ireland, where the number of places is also limited, public–private partnership arrangements are operated at local level, and childcare is increasingly subsidized from public funds but delivered by the market or voluntary sector.

Although public provision of pre-primary school places is more generous and free of charge, opening hours do not match full-time working hours. Moreover, much of the provision is on a part-time basis, and parents are usually left to make their own arrangements for after-school care. In France, where children can be admitted from the age of two, facilities are available for them to be minded before and after school hours. In Germany, all children have a right to a fee-paying kindergarten place from the age of three, and reforms are being put in place to extend school opening hours. In Spain, public or private nursery school places are provided for most children over the age of three, but are available for only limited hours in the day. In the United Kingdom, compulsory schooling starts in the year in which children reach the age of five, but the school day is still much shorter than the standard working day.

Policies to encourage older people to remain in employment include retraining programmes in Italy, Spain and Sweden, and lifelong learning in France, Germany and the United Kingdom. Another measure to tackle growing old age dependency is postponement of the age of retirement to delay labour market exit, as in Germany, where a proposal to raise retirement age to 67 is on the table. Italy, the United Kingdom and Estonia have also raised the age of retirement, and disincentives have been introduced to curb early retirement in Italy, Spain and Sweden. Flexible, or phased, retirement arrangements are being used, particularly in the public sector, everywhere except Greece, Ireland and Poland, to enable older people to retire gradually by progressively reducing their working time (see also Section 3).

In Italy, Spain, Sweden, Estonia and Poland, reform of pension funding mechanisms is intended to ensure their viability and reduce dependence on the population in work. In France, Italy, Spain, Estonia and Poland, where occupational pensions are based on pay-as-you-go schemes, and the number of people drawing a pension is, in some cases, already greater than the number of contributors, solidarity contributions are being levied, involving additional payments to augment the funds available for pensioners. Reserve funds have been created in France, Ireland, Spain and Estonia. Contribution levels, and the basis for calculating pension rights are being reassessed in France, Germany, Italy, Spain, the United Kingdom and Estonia.

At the same time as public provision of childcare places has been increasing, institutional care for older people has been extensively reduced, often for reasons of cost, but also in response to the widespread preference among older people to remain in their own homes, with support from care workers. Residential homes today are frequently funded by a public-private mix, as in Spain, though provision is made there for very few older people. Public day-care centres operate in all the IPROSEC countries except Germany, Italy and Poland, and are usually funded by local government and/or NGOs. In Greece, for example, the Open Centres for the Aged (KAPI) offer premises, activities, social and medical services for independent older people, while public provision for a small number of disabled people is combined with church and private residential facilities.

Overall, Spain is the country that has been most active in introducing measures to offset the impact of old age dependency on the working population, whereas Poland has not instituted any of the policies listed, and Greece only one of them, confirming the picture already painted in Section 3.

OUTCOMES

Few people are prepared to accept a reduction in benefits and services if it means that their household income will be affected. The levying of charges for publicly provided child and eldercare is never well received. The politically motivated introduction of charges for childcare by municipalities in Sweden in the 1990s was, for example, strongly criticized in some quarters for creating regional disparities. Nonetheless, in 2002, a reform was brought in setting fixed-rate charges. In the candidate countries, cutbacks in public provision of childcare during the 1990s provoked a public outcry. Proposals for pension reform, especially in the public sector, regularly result in strikes and demonstrations in France.

Public childcare strategies are, however, credited with enabling more women to enter and remain in employment when they have young children, even though, as indicated in Section 5, some women may feel that they are being forced to delegate their caring responsibilities and find themselves in a situation of trying to juggle incompatible timetables.

A frequent complaint among the IPROSEC respondents was about the mismatch between working hours and the opening hours of crèches and nursery schools, and the need for appropriate policy measures to resolve

the problem. The poor provision of public childcare in Germany is strongly criticized. Although local authorities are under a legal obligation to provide childcare places, lack of funds means many of them are unable to comply.

A side effect of public policy measures has been to raise the level of expectations that parents have of public service provision and, in many cases, to fuel dissatisfaction with the available facilities. Even in France, where provision is very generous compared to most of the other IPROSEC countries, a French woman with a young baby, living in an unmarried cohabiting relationship, explained how restrictive entitlement rules can have the unintended effect of preventing unemployed women from entering employment.

Measures adopted in France to bring care work into the formal sector have had the effect of creating more secure employment for childminders, which is the preferred form of childcare among French parents (Croutte et al., 2001), because it is flexible, personalized, and covered by the benefit system (allocation de garde d'enfant à domicile, Aged). Higher income dual-earner households with several children are the main beneficiaries as they can afford to employ childminders in their own homes. In Estonia, the preference is also for childminders, but the state does not provide any benefits for parents who employ another person to mind their children.

In many cases, the measures being implemented to ensure the longer term viability of pensions, as the dependency imbalance tips more heavily towards older people, have yet to be put to the test. This was not an issue that provoked comment among respondents. The so-called solidarity contributions and reserve funds are already proving to be effective in countries such as France and Spain where the imbalance in some occupations had become critical. Measures to enhance the employability of older people are only slowly taking effect. Lifelong learning concerns about 3% of the EU population aged 55–64, but take up is negligible in all the EU IPROSEC countries except Sweden (10%) and the United Kingdom (13%) (European Commission, 2003, p. 127). Meanwhile, the result of the cutbacks in residential care places for older people has been to create the need for alternative provision. In the candidate countries, in particular, the number of places in residential institutions fell dramatically during transition, making care in the community all the more necessary.

Changing intergenerational care relationships

When the dependency balance is measured in terms of the proportions of the population in different age groups, as indicated above, the picture obtained is broad brush and does not take account of the actual situation and variations within countries across socio-economic categories. Very different proportions of the population aged 15–24 and 55–64 are economically independent, if employment rates are used as a proxy (European Commission, 2001, pp. 110–33; Eurostat, 2001, table 6; GUS, 2001, table 3 (226); IPROSEC partners). In France and Germany, about 69% of the 15–24 age group are described as being in education and training, compared to 56% in Italy. Employment rates for the two age groups range from 46% in Germany to 29% in France and 26% in Italy. At the other end of the age spectrum, the proportion of the population aged 55–64 in employment varies from 65% in Sweden and 51% in the United Kingdom, to 39% in Greece, 30% in France and 28% in Italy, which together with Greece was the country with the highest old age dependency rate in 2000. The IPROSEC candidate countries again display disparate situations. The employment rate for the 15–24 age group varies from 24% in Poland to 33% in Hungary. The highest rate for the older age group is found in Estonia with 43%, compared to 29% in Poland and 22% in Hungary.

The increasingly low employment rates among young adults indicate that they are experiencing longer periods of financial dependency due to delayed labour market entry. In southern Europe, in particular, young people are also postponing leaving the parental home. In the late 1990s, the youngest age at which at least 50% of young people are no longer living with their parents had reached 29.5 in Italy and Spain, and 29 in Greece (European Commission, 2002c, pp. 117, 137). By contrast, the majority of young women in France, Germany and the United Kingdom were gaining their independence in their early twenties. The rate had risen in France, Greece, Italy and Spain.

Northern Europe is also distinguished from southern Europe and Ireland by relatively high proportions of one-person households. Across the European Union, about 2% of the population belong to households composed of an adult aged under 30 living alone, reaching 5% in Sweden, but falling to 0% in Ireland, Italy,

Spain and Hungary (European Commission, 2002c, pp. 116, 136). About 5% of the population are living in households made up of an adult aged over 65 living alone, ranging from 7% in Sweden to 3% in Ireland and Spain. The vast majority of older people living alone are women in all the IPROSEC countries, as noted in Section 5.

Predictions are that by 2010, 26% of the population aged 65–79 will be living alone in the European Union, and 44% of the population aged 80 and over. About 9% of people aged 65–79 are expected to be living with children, other relatives or friends, rising to 14% for those aged 80 or over. For the 65–79 age group, Ireland (16%) is expected to record the highest figure and Sweden (2%) the lowest among the EU IPROSEC countries. For the group aged over 80, Spain (33%) is expected to reach the highest figure and Sweden (3%) will continue to record the lowest (European Commission, 2000b, p. 20).

Multigenerational households, defined as three or more adults with dependent children (though adult children with an independent income may still be living with their parents), account for 11% of households across the European Union, ranging from as high as 24% in Ireland to only 1% in Sweden in 2000. Rates in the candidate countries are above the EU15 average (European Commission, 2002c, pp. 116, 136).

Based on data for 1995 and 1998 from the ECHP (the most recent date for which information is available) for households by age, a young person aged under 30 (34%) or an older person aged over 65 (28%) living alone run a high risk of falling into poverty in EU member states (European Commission, 2002a, table 3c, 2002c, p. 126). People under the age of 30 are most at risk in Sweden and the United Kingdom, and those over 65 are by far at greatest risk of poverty in Ireland. Young people are, by contrast, least at risk in Ireland, the country where they represent the highest young age dependency ratio, and older people in Spain and in Sweden, which is among the countries representing the highest old age dependency ratios. Over the brief period between 1995 and 1998, the level of poverty among younger people increased, while that for older people decreased slightly. The increase among younger people was particularly marked in Greece, Italy, Spain and the United Kingdom, whereas the level fell in France and Germany. The decline among older people was most marked in Italy, but the level increased in Ireland and the United Kingdom, and in France it remained stable.

The percentage of the population in EU member states living in households that receive social transfer payments associated with old age or survivors' benefits was smaller overall than for family related benefits in 1998. However, the amount received in benefits was, everywhere, much greater for old age than for any other category of benefits. The southern European countries were distinguished from other EU member states by the relatively large proportion of their population receiving social transfer payments associated with old age: in Italy, 41% of persons were living in households that receive an old age or survivor's pension, compared to 22% in Ireland. The amount received in purchasing power parities (PPPs) was also relatively high. Italy recorded the largest amount across the European Union, and Greece and Spain registered higher levels than in all the other IPROSEC countries except Germany (European Commission, 2002c, p. 124).

As more women have entered and remained in the labour force when they have young children, they have become less available to care for their own children and parents. The amount of time the sandwich generation spends caring varies considerably between countries, and also within countries between men and women (see Section 5) (European Foundation for the Improvement of Living and Working Conditions, personal communication, 2003). No reliable time series data are available for this indicator. In 2000, much more time was spent caring for children than for older people in all the IPROSEC countries. Estonia recorded the largest proportion of the population sampled claiming to spend at least one hour caring for children every day, followed by Hungary and Italy. The smallest percentages were found in Greece, Sweden, and the United Kingdom. In the case of older people, very few respondents (under 1%) said they provided daily care for older people in Sweden. The level was also very low in France (1.2%). The highest percentages were reached in Estonia (9%), closely followed by Italy (8.8%).

When young age family dependency (age of emancipation, dependency aged 0–19, proportion of the population aged 0–24), is plotted against old age family dependency (dependency aged 60 and over, the proportion of the population aged over 60 and over 80), compared to the EU average, Greece and Sweden are found to be the IPROSEC countries most affected by the combination of high old and high young age dependency in 2000 (European Commission, 2002c, pp. 117, 137; Eurostat, 2002a, tables C–9, C–10, United

Nations, 2002 online). Italy and Germany combine high old age with low young age dependency. Germany maintains its position throughout the period 1990–2000, while Italy has moved into the quadrant by 2000. The United Kingdom moves closer to the EU15 mean for old age dependency, and France falls on the mean in 2000. Ireland is distinguished by its score for high young and low old age dependency throughout the period, together with Estonia, though at a lower level. These two countries are joined by Hungary and Poland in 2000. These data suggest that the countries that might be expected to be most concerned about the problems associated with old age family dependency are Sweden, Italy, Germany and Greece. By comparison, the three candidate countries had less cause to be concerned about dependency among older people than among the younger generations.

CHALLENGES

The changing age balance, in combination with later labour market entry and earlier labour market exit, has resulted in a concentration of economic activity over a shorter proportion of the life span and a heavier burden of financial and practical caring for the pivot or sandwich generation, particularly in the southern European countries, where children remain longer in the family home, and where multigenerational living is more widespread. Public opinion across the IPROSEC countries demonstrates a growing awareness of the threat posed by the demographic time bomb for the intergenerational contract and for solidarity between the generations, especially in countries where families are the main source of support for their members. As more women, who have traditionally been the primary care providers for dependants, have entered paid work outside the home, and the younger generations are becoming increasingly reluctant to assume the burden of unpaid care work, or to take up paid care work, concern is expressed about the need for alternative forms of care provision. The challenge for governments is whether and how to enforce family obligations and responsibilities towards their members and how to deal with intergenerational tensions, while ensuring the provision of good quality affordable care for children and older people.

RESPONSES

Before the advent of the welfare state, the assumption was that the primary responsibility for children and older people lay with their families. Intervention was justified only in extreme cases to assist individuals who were destitute. As shown in Section 2, the extent to which the state has replaced family members as the provider of welfare, and recognition of the legitimacy and social acceptability of government intervention in family affairs have varied considerably over time and space. During the postwar period and through to the 1970s, the northern European and candidate countries, though in very different political environments, went furthest in substituting collective provision for family support in their developing welfare systems. Since the 1990s, pressures to contain public spending have often been associated with moves by governments to place heavier reliance on families to assume responsibility for their members.

Governments in the IPROSEC countries have adopted differing approaches towards the duties and responsibilities of families in this respect. In the Nordic countries, represented by Sweden, the state assumes the main responsibility for the well-being of young and older dependants, although the need for informal care has increased due to cutbacks in public provision. In France and Germany, families are held legally responsible for their dependants. In France, the state plays a strong supportive role in the provision of services. By contrast, in Germany, support from central government is more evident in rhetoric than in practice, and the voluntary sector is heavily relied on for delivery of services.

In the transition countries, families are held legally responsible for their members, and are expected to be less reliant on the state and employers for support than during the Soviet era. In the southern European countries, families have primary responsibilities for their relatives in law and in practice, with minimal support from the state.

Another configuration is found in Ireland and the United Kingdom, where family relationships are not strictly regulated. Families expect to be supported by the state, but also to have recourse to the private sector when they can afford it.

When families fail to carry out their responsibilities towards their members, punitive legislation can be applied. Everywhere except Greece, children can be formally taken into care if their parents fail to perform

their caring duties or put their children at risk. In 2002, in the United Kingdom, 59 000 children were reported to be in care (Children in Need, 2002). In France, the figure was put as high as 150 000 (Ministère de la Justice, 2003). Governments in these two countries and Germany are implementing guardianship orders in the courts, to protect older people from abuse by family members (see also Section 4).

Across the IPROSEC countries, families are assisted to a greater or lesser extent by the state in meeting their responsibilities towards family members. In France, Germany, Italy, Spain and Hungary, tax relief is provided for home helps and childminders, and the British low income tax credit has a childcare component. The state intervenes in the provision of care for dependants through a mix of cash benefits and services, often in conjunction with the private and voluntary sectors, and involving varying degrees of commodification. In Sweden, parents can reduce their hours of work to care for dependants. In Greece, working hours can be reduced for up to two years to care for young children and, in Spain, carers are allowed to take time off from work to care for relatives.

The organization and funding of care work for older people also varies across the IPROSEC countries. In France and Sweden, where most paid care has been brought into the formal sector, it is strictly regulated and protected. The state also controls the working conditions of carers in Germany, the United Kingdom, Estonia and Hungary. In Germany, registered carers are protected by social insurance. In Italy, legislation was introduced in 2002 to regulate the situation of foreign care workers employed by families to look after older dependants in their own homes.

Different arrangements operate to pay for care work, and it is increasingly difficult to distinguish between payments to care givers and receivers. In some cases, both are entitled to payments, and relatives can receive care benefits. In France, where a reciprocal maintenance obligation applies to parents and their children, elder care users receive a partly means-tested benefit with which to pay carers, including relatives but not spouses. In Sweden, a benefit, financed by municipalities is paid to parents caring for disabled children and to individuals caring for older relatives.

Long-term care insurance in Germany, the main form of provision for older people, which is available irrespective of means, includes a care benefit that can be used by the care receiver to purchase informal care in their own home. In the United Kingdom, older people in need of care can opt to receive a direct payment to employ a carer rather than using community services, and the Attendance Allowance can be used to pay family members. Two forms of benefit are paid in Ireland for elder care. Carer's benefit is covered from social insurance for those wishing to leave the workforce for up to 15 months to care for an older or disabled person. A means-tested carer's benefit is paid to those who do not qualify for the social insurance benefit.

In Estonia, benefits are paid to the carer, and in Hungary, they are provided for the care receiver, who can use them to pay relatives. Home care for older people is paid for on a means-tested basis in Poland, in the absence of family support, and payments are provided for both care givers and receivers.

In Italy, where public provision of elder care is limited, disabled care users are entitled to receive a cash benefit to pay for care. They can use it to pay relatives, but the system is not regulated and protected. Tax relief is granted to older people for the cost of care and for medical services provided by paramedics. No special schemes are operated to pay elder care users in Greece.

France, Sweden and the United Kingdom have put in place the widest range of measures to support families in their caring responsibilities, although those implemented in the United Kingdom concentrate on older people. Poland, Greece and Ireland have the lowest level of provision. Germany also reports relatively few specific measures, although the long-term care insurance scheme was intended to provide wide coverage for older people.

OUTCOMES

Cutbacks in public spending on services, such as childcare, and residential homes for children and older people, in combination with the growing need for financial, social and medical support in old age have placed greater pressure on families, to the extent that, in many countries, they are beginning to question the moral, legal and financial obligation to assume responsibility for their relatives.

The perceptions of IPROSEC respondents generally confirmed different national policy stances. In Sweden, for example, although many respondents supplemented public support with practical help and care to make it possible for elderly relatives to continue living at home, they did not consider they had primary responsibility for caring.

Grandparents were not expected to provide childcare for their grandchildren, and it was not unusual for younger people still living at home to pay a small rent to their parents.

In France, families confirmed that they feel they have primary responsibility for elderly dependants, but they expect public administration and local authorities to play a strong support role. The sense of moral responsibility seems, however, to be weakening, particularly among the younger generations and in the urban environment, where the majority view is that people could not have their parents living with them when they are no longer able to be independent.

In the United Kingdom, some respondents made a distinction between young and older dependants. Initially when the child is small the parents are expected to bear responsibility. As they get older, the state is expected to take over, especially for older people. For many people in the United Kingdom, intergenerational dependence was defined broadly to include daily care responsibilities, but also emotional care and support. A high incidence was found among the British respondents of mutual intergenerational dependence, whereby younger family members rely on their older relatives to take care of their grandchildren, for example after school until the mother finished work, in return for which younger generations provide services for elderly parents.

In the candidate countries, respondents also expressed their strong sense of responsibility towards their parents and, in Hungary, towards a much wider network of relatives. A frequently cited answer to questions about living arrangements in Estonia was that respondents wanted to live close to other relatives or family members to be able to provide mutual support. Families with young children receive help from older relatives in taking care of their children, and many families take care of their close elderly relatives (mostly mothers, fathers or parents-in-law), in the widely held belief that children should take care of their parents. Young people, therefore, move to the same area and, in some cases, move in with the older generation. One of the younger male respondents explained that relatives play a large part in supporting families because asking for help from the state can be a humiliating experience. Help from a close relative can avoid needing to deal with state bureaucracy and being made to feel inferior.

In Poland, social workers reported that families may be reluctant to see an older relative placed in an institution, even when it becomes necessary for financial reasons, because they are afraid of losing the regular income from their relative's pension or care benefit.

In the southern European countries, most respondents reported a strong sense of duty towards elderly relatives, but reactions varied according to age and the living environment (urban versus rural, or north versus south in Italy). In Spain, grandparents are an important source of childcare support, but this role is being called into question. The most frequent solution for frail ageing parents in Spain is for them to live with their adult children in a show of familial solidarity, but here too traditional expectations are being questioned. While appreciating the mutual support that parents and children can provide for one another, some of the Greek respondents expressed their reluctance to see several generations living together under the same roof.

In countries where the amount received by families through social transfers to older people is relatively high, as illustrated by the Polish case, multigenerational living can benefit the whole family by raising the households living standards, although the very marked differences in pension entitlements continue to accentuate income inequalities in old age, and the risk of poverty, as demonstrated by analysis of the risk of poverty rates (European Commission, 2002a, Table 6).

Dilemmas in policy and practice

While the trend in most countries is away from multigenerational living, whereby older people live together with their children when they are unable to manage by themselves, greater life expectancy is increasing the

number of four and five generation families and the size of the fourth age population. Even though family members may not live together under the same roof, particularly in northern Europe, they tend to live in close proximity, and exchanges between generations are considerable in terms of mutual practical and moral support. At the other end of the age spectrum, intergenerational living is on the increase as younger people tend to remain longer in the family home and to depend more on their parents for financial support, due to prolonged education and difficulties in finding work and establishing a home of their own, especially in the southern European and candidate countries.

Since the 1990s, most governments have concentrated their efforts on providing support services for young children, in an attempt to enable more mothers to enter and remain in employment. Young adults have attracted attention in public policy insofar as their joblessness is believed to be associated with delinquent behaviour. The prospect of accelerated population ageing is shifting attention towards elder care in a context where families are increasingly unable, or reluctant, to take on the burden of care themselves. The legal obligation to care is increasingly coming into conflict with individualism, which is calling into question enforced intrafamilial solidarity, demonstrating how difficult it is, in democratic and individualistic societies, to impose policies on family members and to go against the grain of change. Rather it is a question of understanding how family support networks operate and how the state can help strengthen them.

The research revealed competing interests and ambivalent reactions not only between policy makers and families, but also within families with regard to the distribution of responsibilities for family members. State benefits for children and older people living in multigenerational families are interpreted in some countries as a means of keeping families together, which may be viewed either positively or negatively depending on attitudes towards independent living. Multigenerational living is also seen as a safety net for older people and as an antidote for heavy reliance on the state.

Several countries are moving towards care solutions that involve payments to carers (childminding allowances, paid parental leave, elder care allowances). An effect of public policy measures to regulate care work is that more women are being paid to care for the children and older relatives of other women who are in full-time employment. In cases where payments are made to family carers who look after their own relatives, the care function receives social recognition and takes on a monetary value, but payment can have negative implications for what are considered as moral duties and responsibilities. Families may be self-interested: living with relatives may not be explained solely by legal or moral obligations but also by the financial benefits accrued from pensions and care allowances.

Countries such as France, Germany and Sweden have gone furthest in providing state-driven alternatives to family care, in principle offering families viable options from which to choose, but choice does not necessarily remove the moral dilemmas faced by family members. It may make them more difficult to resolve.

In light of the growing ambivalence in attitudes towards intergenerational solidarity and state intervention, the main policy needs identified by the research were for greater awareness among policy makers of the tensions resulting from the pressures being placed on families, and a more sensitive approach to the dynamics of population change within society. One-size-fits-all solutions can clearly not be applied either across or within countries, but policy actors could usefully look to their neighbours to broaden their understanding of policy practice in dealing with intergenerational dependency.

4. Conclusions and Policy Implications

An important objective of the IPROSEC project was to inform policy by bringing the policy-relevant findings of the research to the attention of policy practitioners in the participating countries and at European level, through dialogue meetings and through publications such as the seventh series of *Cross-National Research Papers*. In weaving together the many strands of the project, this section begins by exploring how the analysis of changing family structures and the policy responses formulated and implemented at European and national level can contribute to a better understanding of the family policy process in the 11 countries studied. In preparation for dialogue with policy practitioners, members of the project team selectively and critically analysed policies corresponding to each of the four themes structuring the research (as reported above in Section 3). The aim was to assess the extent to which specific policy measures could be deemed to have succeeded in meeting their objectives and might serve as examples from which other countries could derive lessons. This section draws on examples from the material assembled to examine the role of obligated and voluntary policy transfer in the IPROSEC countries, to understand why policies work or do not work and to establish the preconditions for successful policy learning. The section considers the adaptations that are necessary if policies are to be exported to different policy contexts and if policy transfer is to be effective, before summarizing the more general conclusions reached about the ways in which the research can contribute to the improvement of policy responses to the challenges raised by socio-economic change.

The policy parameters of socio-economic change

The findings from the IPROSEC project provide evidence in support of two underlying premises. Firstly, socio-economic trends are generally moving in the same direction but from different starting points, at differing rates and to varying degrees. Secondly, diversity is a central characteristic in approaches to family policy, in its historical development and in public acceptability of state intervention in family life, implying that universalistic or 'one-size-fits-all' solutions are unlikely to be appropriate in the area of family life.

DIVERGENCE IN SOCIO-ECONOMIC CHANGE

The trend data analysed in Sections 3–6 of the present volume illustrate the variations in the pace and intensity of socio-economic change with respect to population decline and ageing, changing family structure, changing gender and intergenerational relations.

Whereas population growth has been slowing down across the European Union, and population ageing has become a widespread phenomenon, Ireland stands apart from the European mean as the country least affected by these two trends. Consequently, it displays the highest young age family dependency. The candidate countries are also distinguished by their relatively large young population, compared to the other IPROSEC EU member states but, in their case, this characteristic is accompanied by negative population growth, due essentially to their much lower life expectancy. They are, therefore, in a similar situation to Ireland with regard to dependency ratios.

Meanwhile, family formation is being delayed and de-institutionalized family forms are, everywhere, becoming more common, despite marked differences in the timing of family formation. Sweden and Estonia are characterized by the most advanced stage of development of alternative family forms. In relation to other EU member states, Ireland, Italy and Spain appear to have moved further from the EU15 mean in the direction of more traditional family forms, although change is gradually taking place among younger, well educated people. Poland is the outlier in relation to the other IPROSEC countries for indicators of changing family structure: it combines traditional family forms with conventional timing of family formation, and has not followed the direction of the European mean over time.

The comparatively high level of population ageing in Germany, Greece and Italy is found in combination with increasing family dependency in the two latter countries, bringing them closer to Sweden for this indicator, while contributing to the repositioning of Sweden nearer to the EU15 mean for the high old age family dependency rate for Sweden.

Indicators of changing gender relations set Sweden apart from the other EU member states in terms of equality of opportunity and work–life balance. In this case, the Swedish position for gender equality has been

reinforced over time. Meanwhile, the three candidate countries have seen gender relations deteriorate since the ending of Soviet rule. Ireland, though with some improvement during the 1990s, is located together with Greece, Italy and Spain as the countries most distinguished by relatively poor equality of opportunity in combination with work-life imbalance.

France and the United Kingdom, in every case, share the same quadrant in the composite graphs for the 2000 data, though France displays more dynamic population growth and the United Kingdom more marked family de-institutionalization and work-life balance/gender equality. Germany, with its higher old age family dependency, also records more conventional patterns of family formation and gender relations and remains closer to the EU15 mean, although the overall data conceal important differences between East and West.

The assumption that socio-economic trends are resulting in similar, but not necessarily identical, challenges was found to apply not only between countries but also within them, as for example between regions (the two Germanys, north and south of Italy, the autonomous regions in Spain), rural and urban areas (Greece, Poland), richer and poorer municipalities (Italy) or ethnic groups (Estonia, France, Germany, Hungary, the United Kingdom). Nor can it be assumed that policy actors are showing the same amount of concern in the face of apparently similar situations, or that they are adopting the same policy solutions to issues affecting family life. Moreover, differences in the pace and timing of change imply that countries which have yet to experience the full impact of socio-economic change, particularly developments associated with population ageing or family de-institutionalization, may be able to draw lessons from observing the responses of governments elsewhere.

DIVERSITY IN THE FAMILY POLICY PROCESS

The rationale for selecting the 11 countries in the IPROSEC project was not, primarily, their suitability as models for lesson drawing and policy transfer. Countries were included from different waves of membership because the aim was to examine not only the contribution of national governments to EU policy formulation in the areas of living and working conditions, but also the impact that European regulation can have on national policy and practice, which justified taking the nation state as the unit of comparison. The project team was interested in the place attributed to family policy in countries at different stages of economic and welfare development and with different conceptions of the family-state relationship. Comparative analysis of family policy in Section 2 revealed a highly complex picture, but where clusters of countries could be identified according to policy environments, public perceptions of family policy, and the policies being formulated and implemented to deal with the challenges raised in each of the areas studied (tables in Sections 3–6). The same policy measures may have different objectives and produce diverse outcomes. Different policy measures may be used to achieve the same objectives and similar outcomes. Nonetheless, the issues the 11 countries are currently confronting as a result of socio-economic change, or are likely to face in the future, particularly with regard to old age dependency and changing family structure, bear sufficient similarity to offer opportunities for exploring the potential for cross-border policy learning.

Two countries, France and Sweden, despite their different welfare histories, were characterized by an explicit, coherent and co-ordinated approach to family policy, which command strong public acceptance of state intervention and delivers a high standard of universal provision across a wide range of measures. Swedish governments were found to be paying more attention to population ageing and the formalization of alternative family living arrangements, while governments in France were more concerned about supporting the family as a fundamental social unit.

Germany, Ireland and the United Kingdom, again despite their different welfare arrangements and policy preoccupations, were identified as EU member states that paid lip service to a partially co-ordinated family policy, but without the same legitimacy and commitment as France and Sweden. Differences were found, however, in the coverage by public policy measures for families, with the United Kingdom recording a much wider range of measures than either Germany or Ireland, and focusing on approaches designed to make families more responsible for their members. Although, in relation to other EU member states, predictably Ireland devoted a greater share of national resources to its young age population, the issue of population ageing was being addressed by pre-emptive policy measures.

The three Central and East European countries share in common the legacy of Soviet rule. During transition, their governments were broadly supportive of families and concerned about population decline, but the parlous state of their public finances has prevented them from being more proactive in the area of family policy, with women as the main losers in many respects. Family life has been given low priority on the policy agenda, except insofar as population decline is seen as posing a threat to national identity, and family poverty, associated with economic restructuring, has become a widespread phenomenon intensifying social divisions. Whereas the legitimacy of intervention in family life is not contested, the public was found to lack confidence in the ability of governments to deliver the standard of services expected by society, to the extent that respondents compared the current situation unfavourably with the past.

Despite their common legacy, the three candidate countries can be distinguished by their policy styles. Since transition their approach to family welfare has diverged. While Estonian governments appear to command a broad consensus over policy objectives and instruments, and society is ready to accept alternative living arrangements, albeit with heavy reliance on family support, family policy in Hungary is disjointed and incoherent due to the competing political ideologies of the four governments that have been in power since 1990. The 1990s seem to have brought a reversal of the modernization process. Whereas policy coverage in Estonia and Hungary is, nonetheless, relatively wide ranging, the situation in Poland is characterized by a dearth of policy measures to support families, accompanied by a return to traditional conservative values and family roles.

The three southern European countries also experienced regime change during the twentieth century, which left its mark on family policy. Their family policy styles can be described as fragmented, unco-ordinated and underfunded, although examples were found of initiatives being taken at regional or local level in Spain and Italy, suggesting that the inadequacies at national level were not preventing policy innovation. Greece, like Poland, presented an extreme case, where the lack of public policy measures was coupled with profound distrust of the state, forcing families to rely heavily on their own members. All three countries were characterized by a high level of public dissatisfaction with government policy. The public appeared to have little confidence in the ability of government to deal with the social problems associated with the combined impact of population decline, ageing, changing family structure and old age dependency.

Overall analysis of family support measures by the project team indicated that the countries identified as having co-ordinated, or partially co-ordinated, family policies generally appeared to be more effective at implementation and delivery. The policy learning case studies suggested that these countries were more likely to achieve their objectives and meet their targets, though not necessarily always in the most cost-effective way possible.

Family policy seemed to be more likely to succeed when it sought to address real family problems and processes, rather than when it was driven by external ideological goals. The case studies identified some of the limits to what countries with different policy styles and environments and, more especially, with different economic imperatives might be able to learn from the examples of other societies.

Understanding policy transfer

In the IPROSEC project, two main types of policy transfer were considered: obligated transfer from international to national level; voluntary multilateral transfer, either during periods of socio-economic transition creating the need for policy reform, or following periods of political change requiring innovative decision-making structures and policy ideas.

OBLIGATED POLICY TRANSFER

Even though policy actors may not be interested in looking for examples of policy practice in other countries, their status as current or prospective members of the EU draws them into cross-border policy learning and transfer. Since the early 1980s, the European Parliament has been trying to move family policy onto the EU agenda, but progress has been slow in the absence of consensus about the legitimacy of state intervention in family affairs across EU member states (Hantrais, 2000). Recent efforts to introduce 'obligated' policy transfer, for example with the directives on working time or parental leave, illustrate the difficulties policy actors are facing in reaching consensus, particularly if they are using the legislative

process. When asked about the impact that membership of the EU has had, or is likely to have in the case of the candidate countries, on policies for families, only a few policy actors in the IPROSEC countries could cite instances where account had been taken of EU measures in the formulation of national policies.

In France and Sweden, some policy actors felt that their legislation already met EU standards. The obligation placed on Sweden to reintroduce maternity leave was seen as a retrograde step in view of the long parental leave tradition dating back to 1974 (see also Bergqvist and Jungar, 2000).

Policy actors in Germany cited several areas in which policy had been influenced by EU legislation, particularly with regard to working time and conditions. Some policy actors in the United Kingdom spoke of the value of an EU prompt in bringing about action regarding family-friendly policies and equal opportunities for women and men, and in Ireland, European law was credited with having substantially improved gender equality.

In Spain, policy actors acknowledged that the European Union had enabled family issues to attain 'agenda status'. In both Greece and Italy, it was recognized that governments have been obliged to adapt their legislation on equality and working conditions to comply with EU law.

Respondents in the candidate countries reported that they were under considerable pressure to adapt to the European social model as a condition for membership of the European Union, the more so since they are required to implement the large body of *acquis communautaires* that they have had no hand in shaping. Polish interviewees maintained that EU law should be a reference point rather than a binding standard. Membership of the EU, following the upheaval of a fundamental regime change, has resulted in careful scrutiny of their welfare systems, involving questioning of traditional assumptions and opening up new policy perspectives.

The three countries provide interesting examples of the problems of obligated transfer, since the cost of delivering Western-style welfare is prohibitively expensive. They find themselves in a similar situation to the southern European member states when they became members of the European Community during their transition to democracy after a period of authoritarian rule. Greece, Italy and Spain were also forced to undergo far-reaching economic restructuring and the overhaul of their welfare systems, resulting in lasting tensions between economic and social imperatives. As the research has shown, like the southern European countries, governments in the candidate countries are ill prepared for new socio-economic challenges.

While the EU cannot be said to have a coherent and visible family policy (in line with the principle of subsidiarity and the concept of competing social systems), it does serve as a stimulus for policy reform, not just through obligated transfer (directives on working time, parental leave), but also, and increasingly, through the open method of co-ordination (OMC). The OMC, which has long served, in an informal guise through the Commission's observatories and networks, to monitor the social situation, social protection, social exclusion, equal opportunities and family policies, is being used increasingly as a more formal means of naming and shaming countries that do not meet the standards agreed at EU level. Annual reports may, however, be blunt instruments for checking on policy implementation when national interests are at stake, as demonstrated by the national reports on measures taken to promote employment: they may provide an indication of good intentions rather than effective actions. However, the OMC may offer a more fruitful approach to policy development, particularly in areas where the principle of subsidiarity is well established. Governments undoubtedly can, and do, use pressure from the EU as a pretext for introducing contentious and unpopular legislation, as for example on working time or parental leave in countries such as the United Kingdom or gender equality in Ireland.

VOLUNTARY POLICY TRANSFER

Voluntary bi- or multilateral transfer has become a topical issue in a context where governments at different stages of socio-economic change and policy development are looking for lessons to guide them in formulating effective responses to the challenges raised by population decline and ageing, changing family structures, gender relations and intergenerational relations, especially during periods of economic transition and tight monetary control requiring welfare retrenchment.

In line with the subsidiarity principle, member states are left to pursue whatever policies they consider most appropriate to achieve the aims of the European Union at national level. They might, therefore, be expected to look to their European neighbours for examples of good practice and for policy lessons. The media regularly compare national practices with those in neighbouring member states, and international meetings of representatives of policy actors, including non-governmental organizations, provide opportunities for the exchange of ideas and experience, which can then feed into the policy process at national level.

The policy learning case studies indicated that, in many instances, policy actors (political, economic and civil society) did not appear to be interested in policy innovations in other countries. Some governments believed they did not have much to learn from experience elsewhere because the system or policy environment are so different. They may prefer to look to their own past and to learn from their own previous experience. Other policy actors are not consciously drawing lessons from elsewhere, or may not keep a record of where they have found examples of good practice. Yet, it can be argued that, just as researchers learn about their own societies from observing what happens in another country, policy actors can also learn from the experience of others. To do so, they need to be open to, and interested in, different practices, as well as displaying a willingness to learn.

Predictably, France and the Nordic states emerged as the preferred models in the area of changing family structure, policy and practice. Sweden tended to look at its Scandinavian neighbours rather than its EU partners. The Dutch model was cited in the German and Hungarian case studies for its novel policies on working time and its liberal approach to living arrangements and relationships. In Italy and Spain, innovative policies developed in a specific region or town were being extended to other areas through a process of internal policy diffusion.

In some instances, the experience of other societies was considered to have produced negative outcomes (examples of bad practice) and was, therefore, rejected, at least at the official level, as a possible model. The involvement of the private sector in the delivery of services in the United Kingdom was cited as an example of a policy direction that other countries did not want to follow. What is considered as bad practice or policy failure can, however, also be of interest for policy learning if the analyst tries to understand the reasons for failure and how it can be avoided.

Preconditions for effective policy transfer

In examining the policy responses of governments in the 11 IPROSEC countries to the challenges presented by socio-economic change, an attempt was made to assess, compare and explain the efficacy of the measures formulated and implemented, and to identify the preconditions for successful policy transfer, with reference to the characteristics of the policy process observed in the countries studied in the course of the research.

The extent to which policies may be transferable is largely dependent on the match between prevailing circumstances in the lesson-exporting and lesson-importing countries, and on the interplay between the policy environment and the policy process. If policy transfer is to be successful, a number of conditions need to be met before it can be contemplated (Rose, 2001, 2002). Firstly, the exporting and importing countries should have a commonality of objectives and a shared definition of the issues to be tackled. Secondly, the policy process in provider and receiver countries needs to be both appropriate and compatible in terms of political ideology and values, welfare design principles, structure and agency for formulation, implementation and delivery. Thirdly, policy learning and transfer have to be seen as desirable, feasible and practical, implying consideration of national constraints and opportunities, covering legitimacy and social acceptability of state intervention, sanctions for non-conformity, and taking account of resistance to change. Fourthly, policy transfer must be affordable and accountable in terms of perceived economic and social benefits, the costs of transportation and adaptation, and the ability to demonstrate value for money, not only for families as users but also for other stakeholders, particularly in the labour market.

The closer countries are in terms of their political and welfare structures, psychological proximity, ideological compatibility, and socio-economic and socio-cultural characteristics, the more likely they are to be able to pool, and learn from, their policy experience. This does not mean that countries that are further apart may not also be able to learn from experience elsewhere, but they may need to make greater

adaptations to the policies they are importing, or to consider radical changes to their structures of governance and policy delivery.

SHARED POLICY OBJECTIVES

All EU member states and candidate countries, by virtue of signing up to European treaties and legislation, affirm that they are committed to developing a social model aimed at promoting economic and social cohesion, without undermining social justice and economic efficiency. To meet the requirements of their treaty obligations, to comply with the social *acquis*, and in response to the challenges of socio-economic change, governments are expected to develop policies in line with Community objectives.

Based on the research carried out for the IPROSEC project in the area of family policy, the participating countries can be said to share in common the objectives of creating an economic and social environment where children and older people are not considered as a burden for individuals or society, where family life is positively valued and where men and women have equal opportunities in their public and private lives and a work–life balance conducive to family solidarity.

The IPROSEC countries where public policy most strongly supports these objectives, and most closely matches public perceptions, insofar as can be gauged by the range of measures recorded in the tables in this volume and the comments from respondents, are France and Sweden. At the other end of the scale are Greece and Poland, where supportive public policy falls far short of achieving Community objectives and does not live up to public expectations. Policy learning between countries at the two extremes is unlikely to be successful. The lack of commitment on the part of government to achieving their policy objectives was one of many reasons why an attempt to transport the French model of counselling centres for women's employment and social integration (Centre national d'information et de documentation sur les femmes et les familles, CNIDFF) to the Greek context did not work.

COMPATIBILITY OF APPROACH

The extent to which shared objectives can be translated into practice using the same or similar policies depends not only on their appropriateness for the importing country but also on the compatibility of the socio-economic, political and cultural environments in the exporting and importing countries. Transfer of policies is more likely to be sought, and to be effective, between countries sharing similar and compatible approaches as, for example, in France and Sweden, although Sweden tends to look more often towards its Nordic neighbours, as noted above. Countries, such as Germany or the United Kingdom, that share some of the socio-economic and political characteristics of the family policy environment of France and Sweden and are seeking ways of implementing EU policies may also usefully look to these two countries for examples of good practice. However, the United Kingdom tends to turn for its policy models to the United States or other parts of the Anglo-Saxon world, with which it has greater ideological, socio-cultural and linguistic affinity. Ireland draws many of its examples from the United Kingdom, largely for historical reasons. The United Kingdom may, however, have served as the conduit for activation policies pursued in France, despite the apparent lack of ideological compatibility and major differences in welfare design principles, structures and agency for formulation, implementation and delivery.

Greece, as indicated above, Italy and Spain are influenced by policy developments elsewhere in the European Union, not least due to obligated policy transfer. A certain degree of compatibility is conferred by the need to reach consensus with European partners and to comply with European law, which in the case of Italy dates back to the 1950s as a founder member of the European Economic Community.

The three candidate countries might be expected to look to Greece, Portugal and Spain, since they also experienced the impact of EU membership after a fundamental regime change entailing far-reaching economic restructuring. Estonia, Hungary and Poland have tended, however, to look in different directions for their policy models. Estonia is turning to its Scandinavian neighbours, as is Hungary, which is also interested in developments in France and the United Kingdom. Poland has drawn examples from Germany. In all these cases, aspirations are often tempered by socio-cultural factors and, more especially, economic realities. As in the longer standing EU member states, ideological compatibility may shift according to the

government power. This is illustrated by Hungary, with its four changes in government since the end of the Soviet era, each bringing a different approach to family policy in line with the prevailing party ideology.

FEASIBILITY OF POLICY TRANSFER

Even in the case of obligated policy transfer, in accordance with the principle of subsidiarity, governments are left to adapt policies to suit national circumstances. It is rare that a policy can be imported without being adjusted in some way, requiring consideration of feasibility and practicality. When the European Union issues a framework policy or guidelines, as in the case of the agreement between the social partners on parental leave and the Employment Guidelines, member state governments are responsible for formulating their own funding arrangements, regulatory mechanisms and methods of delivery. Policy learning may involve one or more of these stages, and exemplars may be sought in more than one country in accordance with national constraints and opportunities. Policies that are readily legitimated in one jurisdiction may not command public acceptance in another context, as was demonstrated, for example, by reactions to government intervention to regulate working hours and conditions and introduce family-friendly working practices. Legislation in the exporting country may impose strict regulatory conditions with high penalties for infringement, whereas, in the importing country, firms may be issued with general guidelines based on the business case, and left to devise their own implementation strategies.

Policies may be delivered at national or local level through public services in the exporting country, as with childcare provision in France and Sweden, and through partnerships with business and the voluntary sector in the importing country, as in Germany. Differences in the structure of public finances and welfare delivery, and the public-private mix were found to be important factors limiting policy transfer from northern Europe to the southern European and candidate countries. For instance, a policy measure borrowed from Sweden, where funding is from general taxation and provision is universal, might be financed in the importing country by employment-related insurance contributions and confined to contributors in the scheme, as in Italy or Spain.

AFFORDABILITY OF POLICY TRANSFER

A major obstacle to policy transfer is affordability. A reason frequently cited to explain why the southern European and candidate countries have problems implementing European law or transporting policies from their central and north European neighbours was lack of funds. The costs of transportation and adaptation may be prohibitively high, particularly for the candidate countries, unless cohesion funds are used to develop carefully targeted programmes aimed at tackling specific social problems. The research raised questions about the extent to which tax payers (individuals and businesses) are willing to pay more for social protection, and about the most acceptable balance between public (national, regional or local government) and private (family and private sector) funding and delivery of welfare.

The related question of cost-effectiveness and value for money of public policy has moved onto the European agenda with the adoption of the Stability and Growth Pact and the commitment to fiscal austerity. The OMC requires countries to prepare strategies and report regularly on progress made, with governments giving a public account of their actions at international level. Some evidence was found among the IPROSEC countries of convergence in the prioritization of the principle of ensuring value for money, as illustrated by reports on the funding of pensions.

Evaluating the outcomes of family policy

Judging whether or not a policy has achieved the desired outcome requires an assessment of the fit between objectives and outcomes. Increasing importance is being attached to evidence-based practice, in France and the United Kingdom for example, as a means of ensuring policy is rigorously scrutinized in terms of feasibility, practicality, affordability and public accountability. The IPROSEC project was not designed as a controlled experiment to monitor and evaluate specific family policy measures, allowing a direct causal relationship to be established between a given policy and decisions about family life. Few of the project team members were able to find reliable evidence of whether policies are working in the absence of systematic monitoring and evaluation reports. Rather, the aim was to help fill one of the many gaps in knowledge about the relationship between policy and social change by examining cross-nationally the process whereby public

policy impacts on families and, more especially, perceptions among policy actors of the influence of family policy on decisions taken about family life. Since few countries, as yet, have in place reliable systems for assessing the effectiveness of policies, a variety of evidence-based approaches (analysis of statistical data and documentary sources, attitudinal surveys, elite and family interviews, and vignettes) were used in an attempt to track the policy process and assess whether policies appear to be achieving the desired effect.

BENCHMARKING FAMILY POLICY OUTCOMES

Benchmarking is being used increasingly to track and measure the performance of national governments in meeting the targets set at international level. Governments seeking to improve their policy responses to socio-economic change are being encouraged to look to other countries not only for examples of how best to respond to the particular challenges they are facing but also for ways of avoiding the mistakes made elsewhere.

The OMC makes extensive use of benchmarking to gauge the performance of member states against the targets set. The 1997 Luxembourg European Employment Strategy, for example, requires member states to meet targets such as raising employment levels among women and older people, and improving childcare provision (COM(2003) 6 final). The extent to which policy formulated at EU level is effectively implemented in member states remains difficult to ascertain, not only because member states are left to choose their own policy mechanisms, but also because the effectiveness in monitoring, policing and applying sanctions can vary considerably from one country to another. Although legislation may have been incorporated into national law, the number of cases brought before the European courts for infringement differs markedly from one member state to another. For example, by 1997, figures for cases before the European Court of Justice for infringement of European legislation on equal opportunities ranged from 31 for the United Kingdom and 30 for Germany, to one each for Greece and Italy (European Commission, 1997, table 29). Legal action may, thus, provide an indication of effective policing and access to legal services rather than poor implementation, the more so when it is left to member states to decide on the form and method of implementation, as with the framework directive on parental leave.

In the area of family policy, quantitative data, though useful as a means of informing policy, may not always provide meaningful indicators of the success, or otherwise, of policy measures. The relationship between policies designed to encourage family building and fertility rates appears, for example, to be ambiguous. An observed increase in the level of family allowances and a measurable rise in fertility rates cannot be assumed to demonstrate a causal relationship between policy and practice, as demonstrated by the fact that the two countries in the project with the highest completed fertility rates, France and Ireland, have very different levels of policy provision in this respect.

If the effects of childcare provision are measured in terms of the ability of parents to combine employment with childraising, statistical data would suggest that the demand is being met to a greater extent in Sweden than elsewhere. Although the provision of places is less extensive in France, a larger proportion of women in employment are working full time, than in Sweden. The combination of very poor provision of places in public childcare and high full-time rates among women in employment in Greece and Poland conceal quite different overall female employment rates in the two countries.

In many instances, comparable data were not available for all the countries under study for the same data points (see Annex 1), making it difficult to track trends over time or to unravel linkages between policy and outcomes. Qualitative approaches that take account of context specificity and the motives and meanings of actors, therefore, provided a valuable, complementary tool for fleshing out the possible effects of social policies, particularly when they examine the totality of the process from policy formulation through to implementation and practice, as translated into the lived experience of families. Qualitative analysis of the decision-taking process within families suggested, for example, that, in the southern European and candidate countries in particular, it was not the absence of supportive family policy measures that explained the postponement of family formation. Rather couples were dissuaded from having children by their perception of the generally low standard of living of families, and the problems of accessing stable, secure and well-paid employment and good quality healthcare, housing and other public services.

MEASURING USER SATISFACTION

A policy is sometimes said to have worked if ‘customers’ are satisfied, but satisfaction ratings, like attitudinal data, are notoriously unreliable. In addition, the public may not share the perceptions that political and administrative actors have of the success of policies. Where policy actors have raised expectations during an electoral campaign, it may be difficult for them to meet their promises when they are in power.

Moreover, recorded satisfaction may have little to do with the actual service received. What is believed to be an acceptable level and quality of provision in one country may be judged differently elsewhere. People who may be considered, objectively, to have benefited from a specific policy may report that their experience was negative. Where standards of living are generally low, and confidence in governments to deliver is limited, the public may ‘make do’ with provision that is elsewhere considered to be poor, because they have low expectations. In France, for example, respondents complained about the inadequacy of childcare, but in relative and objective terms, the childcare requirements of French parents appear to be much more adequately met than in most of the other IPROSEC countries. The findings from other work on family and welfare also point to an apparent paradox between the objective situation and subjective perceptions. In a study of households, work and flexibility (Wallace, 2003), the EU countries, especially Sweden, with a long history of policies to help balance work and family life, and reporting the greatest degree of sharing of domestic labour, were found to be those where the family–work conflict was experienced as most difficult. Because they had no expectations of equality, respondents in the candidate countries did not, on the whole, claim to experience family–work conflict, although they were working the longest hours.

The empirical work carried out for the IPROSEC project showed that perceptions of the relationship between policy and behaviour are ambivalent. Few respondents spontaneously identified a direct link between policy and personal decisions about family life. Irrespective of the level of provision, few were satisfied that public policy does enough to support families. In France and Sweden, public policy for families tended to be taken for granted.

ISOLATING POLICY EFFECTS

Another problem in judging whether or not a policy has worked is how to isolate the effects of a specific policy measure, particularly in retrospect, and in situations where policies have multiple objectives, or where the outcome is not necessarily the one intended. The findings from the secondary analysis of data and from the family interviews carried out by the project team suggest that public childcare provision, for example, is not the only factor, or necessarily the main factor, as is sometimes posited, in explaining high full-time dual-earner rates. A whole bundle of measures may need to be considered, including time policies, arrangements for monitoring the quality of public childcare provision, the availability of public sector employment for women and of protected domestic service jobs, as well as a generous child benefit package. Such an array of measures are unlikely to be readily transferable to another country that does not have the same level of commitment or effective funding and delivery mechanisms. Similarly, the lack of success of measures designed to force men to take up parental leave in Sweden may not only be attributable to wage differentials, as is often claimed, but also, and possibly more importantly, to power relations in society, which may require a different set of policies (Hobson, 2001).

Another factor making it difficult to isolate the effect of policies is that the outcomes of policies may not necessarily be what was sought or intended. Policies designed to redistribute resources vertically may, for example, not be of greatest benefit to those most in need, if take up is limited due to the stigma attached to means-tested benefits, as in Greece. In several cases, particularly in southern Europe and the candidate countries, enforcement of policies to protect women as mothers and, thereby, close the gender pay gap was found to have the unintended effect that employers prefer to recruit men. Policies targeted at specific age or socio-economic categories may create a dependency culture or provoke intergenerational tensions, which are not only unintended but also unwanted outcomes. Unexpected outcomes are not, however, necessarily always negative. Family policy measures such as universal child benefit in France, Sweden and Estonia can be taken as an indication of the value society attaches to family life and children.

Whereas reference was made to the effect of withdrawal of previous support, or lack of policy, to explain negative decisions about family formation, the interviews suggested that improved provision for families

could not, by itself, be assumed to have an immediate positive effect on decisions about family life. As mentioned above, it was the wider economic and social climate that was found to be a more discriminating factor in shaping decisions.

The policy learning case studies indicated that interest in other countries may not be provoked by actors concerned with family policies as such, but rather by the need to achieve policy targets in other areas, most notably employment. Such measures, though serving as an instrument for different policy objectives, can and do have a major impact on family well-being. The emphasis in the EU employment strategy on high employment and employability and, hence, on the need to develop provision for childcare to make mothers available to go out to work, while also promoting parental leave, is a case in point, which has a number of side effects for families. Another example was the reduction of working time in France, and the introduction of the 35-hour week, which was intended to create more jobs, and appears to have had a beneficial effect on family life without increasing inequalities between men and women. Shorter working hours, combined with more flexible time schedules, have made it possible for some men and women to negotiate the sharing of parental responsibilities within the family and to accommodate their children's school times. Instances were cited of the law having had the effect of removing the need for paid childcare since parents were able to share the task instead of outsourcing it (Fagnani and Letablier, 2003).

INTERPRETING OUTCOMES

Determining why a policy does or does not work is equally, if not more, difficult than determining whether it worked, particularly in view of the absence of direct and unequivocal evidence demonstrating causal effects. Even where policy evaluation is regularly undertaken, it is often difficult to interpret outcomes as marking the success or failure of specific measures (pro-natalist policies are a classic case in point). This raises the issue of whether a policy can be deemed to be successful if it achieves unintended but positive effects, for example the reduction in working time in France, or if it is a victim of its own success and proves to be very expensive, as with the elder care benefit introduced in France in 2001 (*allocation personnalisée d'autonomie*, APA).

Analysis of the fit between policy and practice highlighted many of the tensions resulting from competing interests and ideologies between different policy actors, between and within countries, between policy makers and families, and also within families. Conflicting, contradictory, confused or non-explicit objectives make outcomes difficult to interpret, particularly across national boundaries.

The policy findings and several of the case studies raised the issue as to whether universal or targeted measures are more likely to produce positive outcomes, not just with reference to family allowance, child and childcare benefit, but also benefits associated with old age and eldercare. This often translates into a choice between low universal and high targeted benefits. Reference was made to evidence from studies in Austria and Finland to demonstrate that it may be more expensive administratively to target benefit than to retain universality. In almost all cases where benefits are provided on a universal basis, additional means-tested support is also available for specific groups.

Another contentious issue with regard to outcomes was that of preferences for benefits or services, and the question of what is seen as the right balance in a given society. Most people want more and better quality provision for families, but variations were found in the preferred form and method of delivery, depending on how much trust people place in the state. In the north, the preference is more often for services, but in the south, particularly in Greece, for benefits.

The interpretation of outcomes is further complicated by the lack of consensus over objectives. Support for family building may, for example, be in competition with the aim of combating child poverty, although the two objectives can, unintentionally, coincide, as illustrated by the case of child benefit in Estonia. Pro-natalism may be elitist, as demonstrated by targeted support measures to encourage 'quality' children in Hungary, which conflicts with the aim of social solidarity. Emphasis in policy may be on children, parenting and/or older people; or it may be designed to promote independence or family solidarity, rights or responsibilities.

The outcome of state benefits for children and older people living in multigenerational families may be interpreted in some countries as a means of keeping families together, which may be viewed either positively or negatively depending on attitudes towards independent living. The legal obligation to care may conflict with measures encouraging greater individualism, for instance through the income tax system. Multigenerational living is also seen as a safety net for older people and as an antidote for heavy reliance on the state. Families may be self-interested, as demonstrated by some of the respondents in Poland and Spain: living with relatives may not be explained solely by legal obligations but also by the financial benefits accrued from pensions and care allowances. Alternatively, payments to family carers looking after older people can be interpreted as giving social recognition and status to the care function.

The ambivalence of policy outcomes is further demonstrated by the pressure exerted on women to have children and to stay at home to raise them in their early years, while also being expected to enter and remain in the workforce and subcontract childcare as children grow older. Paid parental leave and childrearing benefit may be considered as a means of enabling parents to exercise choice about whether they care for their own children when they are young, and/or as social recognition of the value of parenting, or it may be interpreted as confirmation of women's homemaker role and a means of restricting their employment opportunities (either way it is not gender neutral). Similarly, men are under pressure to become active fathers, at the same time as continuing to be the main breadwinners. Policies that seek to promote the economic activity of parents may divert attention away from the best interests of children, or vice versa. Policies to encourage older people to remain in the labour force may draw attention to problems of age discrimination.

Cross-border lessons for improving policy responses

The IPROSEC project set out to explore how public policy responses to socio-economic change might become more effective in different policy environments. The 11-country comparison generated a number of insights that contribute to a better understanding of the relationship between socio-economic change, policy and practice. The analysis suggested five overall conditions that must be met if family policy is to be effective. Firstly, a family-friendly and supportive social environment is needed, founded on the principles of equality of opportunity, social solidarity and vertical redistribution of resources. Secondly, economic security must be ensured based on a high level of employment and the guarantee of a living wage or minimum income, making work pay. Thirdly, an equitable and consensual sharing of responsibilities is essential between political, economic and civil society policy actors over aims and objectives, which must be clearly communicated to the public. Fourthly, effective mechanisms are needed for funding, co-ordination across sectors, and implementation and delivery of a good standard of benefits and services. Public policy intervention must command widespread legitimacy and acceptability. The public needs to have confidence in government. Finally, policy should be responsive and non-intrusive to allow maximum choice.

TOWARDS A FAMILY-FRIENDLY SOCIETY

The research demonstrated that, in general, policy actors are aware of the centrality of families and households in social and economic life, and of the dependency of most other areas of public policy on the well-being (or otherwise) of families and households. The growing diversity of family forms as a consequence of the progressive decoupling of marriage and family life and the spread of less conventional living arrangements is resulting in wider acceptance among policy actors of the need for more accommodating regulatory frameworks, so that diversity does not become a source of social problems and discriminatory practices. Social solidarity, as manifested in policies to redistribute income vertically, is widely recognized as a legitimate objective for family policy, but electorates are divided within and between countries over the most appropriate and equitable mechanisms for redistributing resources.

Explicit family-friendly policies are being adopted not only as an integral component of work-life balance and employment action plans, but also as an important dimension in the promotion of equal opportunities between men and women, different age, socio-economic and ethnic groups, in both the public and private spheres. The differing reactions revealed by the research between and within societies, and within families, according to age, sex, education, occupation, income, location, point to the need for policy to become ever more sensitive and responsive to changing situations.

The spill-over of policy from the workplace to the home through measures to encourage greater sharing of paid work and domestic roles, combined with attempts to enforce men's involvement in caring, marks a relatively new departure. The shift of focus has met with varied reactions between and within countries, illustrating the problems of achieving obligated transfer. Too much family friendliness and too great an emphasis on active parenting may, for instance, exert undue pressure on individuals and contribute to insecurity and refusal of parenthood. These observations suggest the need for a more differentiated and softer approach to policy formulation and implementation that takes full account of socio-cultural factors and the unintended effects of policy.

THE ECONOMY OF FAMILY LIFE

The boundaries between policies targeting families and other policy areas proved to be porous and unstable, particularly with the growing emphasis on employment and employability in policy and in practice as the preferred solution to the economic problems of both the state and families as units of production and consumption. Comparisons between the 11 countries demonstrated that family life was often subordinated to economic imperatives, not only as reported in the priorities of policy actors, but also as recorded in the decisions families take about their living arrangements. Recognition of family diversity is, for example, causing political actors to revisit the case for universal versus targeted provision, with a view to achieving more effective vertical redistribution of resources, while holding social spending in check, signalling competition between economic and social objectives. Although a few examples were found of couples marrying to gain entitlement to social benefits and services, families are rarely responding to isolated policies in a calculating way. Across Europe and within societies, economic security was, however, shown to be a prerequisite for family formation, based on formal, protected employment that guarantees a living wage, irrespective of whether or not society supports traditional or de-institutionalized family forms. The problem of earning an adequate income was most strongly articulated in the candidate countries, where strategies for achieving work-life balance were a minor consideration among policy actors, including families. Only when this basic requirement was satisfied did attention turn to working arrangements, working conditions and work-life balance, indicating the need for governments to adapt policies to suit their own socio-economic contexts and to be flexible in applying them.

Flexibility as a central component of labour markets and working conditions was a recurring theme, but was perceived in different terms from one country to another and within societies, depending on whether it offered greater individual choice for workers, or was seen as being imposed by employers. The research suggests that a case could be made for a broader vision of flexibility policy as a positive component in family life. Shorter working hours, less rigid working arrangements and longer opening hours for public services are not necessarily incompatible. They may help improve the quality of everyday life and provide for greater individual choice, particularly if they are negotiated to the mutual benefit of employers and employees.

Imposing strong regulatory conditions was found to be counterproductive if it leads individuals and employers to evade implementation or to 'play the system'. The business case for adopting family-friendly and work-life balance policies is being strongly and successfully advocated in some countries as an alternative to rigid regulation and as a cost-effective and flexible solution to questions of work-life balance. Together with social partnerships, the business case was, however, criticized as dereliction by the state of its responsibility (Germany for example). Increasingly, the business case is also being made for the retention and reintegration of older workers, ensuring their employability, and as a means of preventing ageism and age discrimination.

Whether or not business should be involved in family policy remains a contested and much debated question, but the research showed that, in many respects, economic actors cannot avoid becoming involved in their capacity as employers of women and men with family responsibilities.

CO-ORDINATING THE POLICY PROCESS

The various stages of the research each added a new dimension to the variegated picture of the relationship between the state, the many actors involved in the family policy process and different levels of governance. Although some convergence of policy objectives and measures may have occurred due to obligated policy transfer, no strong consensus was found over the place of public policy with a family impact in European

societies and between policy actors: the subsidiarity principle remains a barrier to family policy at EU level and in many of the countries studied. At the one end of the spectrum in the countries where state intervention is welcomed and expected (France and Sweden), the state assumes the role of legislator, provider, arbiter and enabler, working in partnership with economic and civil society actors, who represent the interests of families. At the other end of the spectrum, the state is seen at best as well meaning and supportive, but ineffectual (Estonia), and at worst as partisan, corrupt, and not to be entrusted with family matters (Greece). In the southern European and candidate countries, employers and civil society are rarely credited with much greater competence in the family policy domain, and families are left largely to their own resources.

One of the problems in co-ordinating family policy is that it often gives rise to ideological tensions between policy actors within societies over priorities, objectives and policy mechanisms, to the extent that the policy process is severely hampered. The problem has been exacerbated in countries that experienced a change of government in the course of the project, due to the instability of the political environment, confirming that ideology does matter for family policy: conflicting ideologies would seem to make for inconsistent policy.

The time lag between the point when a topic requiring a policy response is identified and the point when the effects of a policy become visible may be very long, whereas the time horizons of political actors are generally short. Changing family structure takes place on a much longer time scale than social policy development. The issues raised by population decline and ageing and their effects on intergenerational relations have, however, made policy actors acutely aware of the need to take account of the longer term implications of socio-economic change. Even countries where the immediate situation is not a cause for concern have realized the need to take preventive measures to ensure the longer term viability of pensions and care arrangements for older people (Ireland for example). Pro-natalism and national identity were recurring themes in the candidate countries though, due to their negative ideological connotations, they were not always made explicit in policy, and were not widely accepted as legitimate reasons for policy intervention.

The drivers for state intervention in family life are many and varied but, like governments and political ideology, they change over time and space. Governments, and more specifically local governments (partnerships in Germany), since they are closest to families, need to work in conjunction with economic actors and gain their support, for instance by making the business case, which raises issues of power relationships and empowerment. Increasingly, through their involvement as paymasters and contributors to social insurance, employers are being drawn into policies concerning older people in the workforce. The contribution of civil society actors, who are close to the ground, might also be expected to become more extensive, and to help empower families, but the research showed that, in most countries, as yet, they had a relatively low profile and were not closely involved in the policy process.

FROM POLICY TO PRACTICE

The discrepancy between political rhetoric and the policies formulated and implemented by governments was a recurring theme in the empirical research. Several instances were found of family policy issues being used to win votes in elections, only to be dropped, subsequently, from the agenda. Levels of implementation and standards of monitoring differed markedly both across and within the 11 countries, demonstrating that agreement at EU or national level over the adoption of a common policy is not necessarily matched in practice at the individual workplace or in the local community, as in Greece. In some cases, poor implementation was attributed to fragmentation of responsibility (childcare in Germany) and excessive bureaucracy (take up of benefits and services in southern European and candidate countries). The apparent gap between policy and practice also suggested the general need for more systematic monitoring, evaluation and checking of implementation.

A question addressed in the policy learning case studies was how to bring about reform in policy and ensure that it feeds through into practice. The issue is relevant not only for policy actors looking to introduce proactive policy measures, requiring acceptance by the policy community and the public at large, but also relates to the capacity of policy actors themselves, whether political, economic or civil society actors, to respond flexibly to change. The case studies showed that some sectors of society are particularly resistant to change. It is always easier, politically, to introduce new and more generous benefits and provision than to overhaul the system, as illustrated by public reaction to pension reform.

The ability to drive through a policy change may depend on highly motivated and active individuals (women in Italy, academics and social workers in Spain), who are capable of seizing the initiative at local level, in the first instance. While obligated policy transfer is an example of top-down reform, the case studies suggested that effective reform is more likely to be bottom up, based on consultation, negotiation and consensus, which means that governments need to pay attention to getting their message across if they are to take the public (electorate) with them. The research showed how important it was for policies to be sold to, and accepted by, the community, a process that was much more likely to be successful if policy objectives reflect public opinion and match behaviour.

The mass media were of interest to the project for two reasons. Firstly, they provided a useful source of information about reactions to the socio-demographic trends being tracked in the project and an indication of issues of topical concern. Secondly, they were found to play an important role in some countries, notably the United Kingdom, in publicizing benefits and services, particularly at local level, and in disseminating information about the development of different family forms and the rights of family members. In a few instances, social workers were found to act as repositories of knowledge about procedures for accessing entitlements (United Kingdom), while integrated agencies, as in France with the Caisse nationale des allocations familiales, or the Försäkringskassan in Sweden, played a valuable role in co-ordinating the delivery of policy, in simplifying access and ensuring take up.

The media may also play a more negative role by fanning anxieties and creating moral panic, for example by publicizing cases of welfare abuse and giving a high profile to delinquent behaviour rather than drawing attention to underlying demographic trends, such as population ageing, creating the need for reform. Political rhetoric can have a similar effect, making it difficult for families to understand the issues that are likely to impact on them personally.

The policy learning case studies suggested that, in areas where social change is only slowly being accepted, a step-by-step, rather than a big bang, approach may be more effective in changing attitudes (Greece, Hungary). Small doses of innovation were found to be easier to absorb than large ones. It may also be more effective to seek to transfer a particular approach to policy formulation, for example by seeking a holistic solution to a problem, rather than by adopting a specific measure, or to borrow part of a measure rather than trying to implement it in its entirety (female employment in Greece).

TOWARDS RESPONSIVE POLICY

The research demonstrated clearly that, nowhere, was the public prepared to accept heavy-handed intervention in matters concerning family life. Prohibitive and proactive policies were overwhelmingly rejected in favour of a more conciliatory approach that goes with the grain of socio-economic change and seeks to deal with the problems it creates in a responsive and non-intrusive way, so as to complement rather than usurp family responsibilities.

In the final analysis, individuals expect to be able to choose how they manage their lives. They look to the state to provide conditions that allow them maximum choice without creating further dilemmas and tensions. The findings from the IPROSEC project show that European families are increasingly diverse and do not send a single unambiguous message to policy makers. Moreover, they are not the only stakeholders involved in family policy, particularly where it demands substantial public resources and regulation. Employers, individual taxpayers and government represent the broader public interest, while also themselves being members of families. How policy actors attempt to respond to the aspirations of families, and their success in doing so, depends on their ability to understand and unravel the complex mix of economic, political and social factors that shape family life and family policy, for it is not sufficient for policy to concentrate solely on the symptoms of socio-economic change, it must also address the underlying causes.

5. Dissemination and Exploitation of Results

As demonstrated by Annex 7, the IPROSEC team has already disseminated the project findings widely through publications, papers at seminars and conferences, end user dialogue group meetings and the project dissemination conference.

After the submission of the final report, Linda Hantrais will work on a single-authored book she has been contracted to write by Policy Press, Bristol, UK, drawing on the project research, entitled *Family Policy Matters: European Policy Responses to Family Change*. She is also preparing further articles for publication in refereed journals, including methods papers.

Dagmar Kutsar and Ene-Margit Tiit are preparing a journal article on changing family structures and policy responses in Europe, and Dagmar Kutsar is editing a book aimed at end-users in Estonia based on IPROSEC materials, entitled *Millist perepoliitikat me vajame?* [What Family Policy Do We Need?], Tartu: TÜ Kirjastus, due to be published in August 2003.

The Polish team is producing a monograph in Polish, entitled *Families in a Changing Society*, which is due to be published in December by the Łódź University Press.

Loukia Moussourou and Maria Stratigaki are preparing an edited book, *Family Policy and Family Practices; findings from an empirical research project*, due to be published in 2003 by Gutenberg, Athens, in which invited contributors will comment on the IPROSEC findings by social science researchers.

Ingrid Jönsson and Marie-Thérèse Letablier are drafting an article for submission to *European Societies* on 'The changing generational contract'. Ingrid Jönsson is reworking her paper on 'Reconciliation of work and family life in Western Europe' into a chapter for an edited book by Paul Littlewood, Ignace Glorieux and Ingrid Jönsson, which has been accepted for publication with Ashgate. Ingrid Jönsson and Marie-Thérèse Letablier have also had a paper accepted for presentation at the ESA conference in Murcia, Spain, on 23–26 September 2003, on 'The Changing Generational Contract'. Ingrid Jönsson will be giving a lecture at Fudan University, Shanghai, China on 25 October 2003 on reconciliation of work and family life in Western Europe.

Dagmar Kutsar is organizing an end-user dialogue group meeting in Estonia on 19 September 2003, which will be attended by Linda Hantrais. The meeting was originally planned for March 2003 but had to be postponed due to the parliamentary elections taking place in March.

The team's future dissemination plans are summarized in the table below:

Form	Partners	Working titles and publishing details
Authored books	Linda Hantrais	<i>Family Policy Matters: European Policy Responses to Family Change</i> , Policy Press, 2004
Edited books	Dagmar Kutsar	<i>Millist perepoliitikat me vajame?</i> [What Family Policy Do We Need?], Tartu: TÜ Kirjastus, August 2003
	Wielisława Warzywoda-Kruszyska	<i>Families in a Changing Society</i> , Łódź: Łódź University Press, 2003
	Loukia Moussourou and Maria Stratigaki	<i>Family Policy and Family Practices; findings from an empirical research project</i> , Athens: Gutenberg, (forthcoming)
Articles	Linda Hantrais	Analysis of European family policy, policy learning and cross-national research methods, for submission to <i>Journal of European Social Policy</i> , <i>International Journal of Social Research Methodology</i> and <i>Journal of Public Policy</i>
	Ingrid Jönsson and Marie-Thérèse Letablier	'The changing generational contract', for submission to <i>European Societies</i>

Articles	Dieter Eißel and Jeremy Leaman	'Taxing families: taxation and social distribution in Germany and Britain', for submission to <i>New Political Economy</i> in the first instance
	Dagmar Kutsar and Ene-Margit Tiit	'Changing family structures and policy responses in Europe', tba
Book chapters	Ingrid Jönsson	'Reconciliation of work and family life in Western Europe', in Paul Littlewood, Ignace Glorieux and Ingrid Jönsson (eds), Ashgate (forthcoming)
Conference papers	Ingrid Jönsson and Marie-Thérèse Letablier	'The Changing Generational Contract', ESA conference, Murcia, Spain, 23–26 September 2003
	Ingrid Jönsson	'Reconciliation of work and family life in Western Europe', Fudan University, Shanghai, China, 25 October 2003
End user dialogue group meeting	Dagmar Kutsar, Linda Hantrais	Tartu, Estonia, 19 September 2003

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7. Annexes

7.1 Publications

- Abela, Anthony, 'Family values and social policy in Europe', *Cross-National Research Papers*, 6 (5), 2003, 16–28.
- Ackers, Peter, (ed.), *Cross-National Research Papers*, 6 (4) *The Employment Relationship and Family Life*, 2003.
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- Appleton, Louise, 'Country profiles: geographical contexts', First IPROSEC Workshop, Loughborough University, July 2000.
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- Appleton, Louise, 'Transnational civil society in the field of family policy: lessons for geographers', paper presented in panel discussion on 'Redefining civil society: space, place and associational life', Annual Conference of the Association of American Geographers, New Orleans, 7 March 2003.
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- Hantrais, Linda, 'Project Overview and Methods', First IPROSEC Workshop, Loughborough University, July 2000.
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- Karelson, Kati, 'Reconciliation of work and family: attitudes of employers and employees in European countries', paper presented at the annual conference of Estonian Centre of Excellence of Health and Behavioural Sciences, held in Pühajärve, Estonia, 20–22 June 2003.
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- Kutsar, Dagmar, 'On ideal family structure and composition in comparative perspective', paper presented at the annual conference of Estonian Centre of Excellence of Health and Behavioural Sciences, held in Pühajärve, Estonia, 20–22 June 2003.
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- Letablier, Marie-Thérèse, 'Femmes et care : études de cas – l'aide à la personne et protection sociale', paper presented at the conference of the Université des femmes à Bruxelles, 'La protection sociale: un enjeu fondamental pour les femmes', 29 November 2002, Brussels.
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7.3 List of deliverables

7.3.1 Print

7.3.1.1 IPROSEC Findings, pp 8, May 2003

7.3.1.2–8 *Cross-National Research Papers*, Sixth series: Improving Policy Responses and Outcomes to Socio-economic Challenges: changing family structures, policy and practice

7.3.1.2 *Conceptualizing and Measuring Families and Family Policies in Europe*, n° 1, 2000, pp 60, edited by Louise Appleton and Linda Hantrais

7.3.1.3 *Spatio-Temporal Dimensions of Economic and Social Change in Europe*, n° 2, 2000, pp 76, edited by Louise Appleton

Contributors: Dieter Eißel, Maurice FitzGerald, Alec Hargreaves, Tess Kay, Ágnes Kende, Jerzy Kryzyszkowski, Dagmar Kutsar, Jeremy Leaman, Devi Sacchetto, Ene-Margit Tiit, Wielislawa Warzywoda-Kruszynska

7.3.1.4 *Comparing Family Policy Actors*, n° 3, 2002, pp 68, edited by Louise Appleton and Linda Hantrais

Contributors: Peter Ackers, Louise Appleton, Paul Byrne

7.3.1.5 *The Employment Relationship and Family Life*, n° 4, 2003 pp 56, edited by Peter Ackers

Contributors: Peter Ackers, Mònica Badia i Ibañez, Roberta Guerrina, Kait Kabun, Devi Sacchetto, Elizabeth Such

7.3.1.6 *Changing Family Structure in Europe: new challenges for public policy*, n° 5, 2003 pp 75, edited by Marie-Thérèse Letablier and Sophie Pennec

Contributors: Anthony Abela, Olivier Büttner, Ingrid Jönsson, Kati Karelson, Dagmar Kutsar, Valentina Longo, Mária Neményi, Ene-Margit Tiit, Olga Tóth, Jutta Träger

7.3.1.7 *European Case Studies in Family Change and Policy Practice*, n° 6, 2003 pp 86, edited by Louise Appleton and Linda Hantrais

Contributors: Moira Ackers, Mònica Badia i Ibañez, Olivier Büttner, Julia Griggs, Kati Karelson, Valentina Longo, Elizabeth Monaghan, Olga Niméus, Katre Pall, Malgorzata Potoczna, Lucyna Prorok-Maminska, Devi Sacchetto, Elizabeth Such, Judit Takács, Dimitra Taki, Jutta Träger, Spyridon Tryfonas

7.3.1.8 *Comparing Family Change and Policy Responses in Europe*, n° 7, 2003 pp 110, edited by Linda Hantrais

7.3.1.9 Policy Learning Case Studies, Dissemination Conference, 3 April 2003, pp 31

7.3.2 CD-Rom

7.3.2.1 IPROSEC Findings, pp 8, May 2003 (pdf)

7.3.2–8 *Cross-National Research Papers*, Sixth series: Improving Policy Responses and Outcomes to Socio-economic Challenges: changing family structures, policy and practice (pdf)

7.3.2.2 *Conceptualizing and Measuring Families and Family Policies in Europe*, n° 1, 2000 (pp 81 pdf), edited by Louise Appleton and Linda Hantrais

7.3.2.3 *Spatio-Temporal Dimensions of Economic and Social Change in Europe*, n° 2, 2000 (pp 100 pdf), edited by Louise Appleton

Contributors: Dieter Eißel, Maurice FitzGerald, Alec Hargreaves, Tess Kay, Ágnes Kende, Jerzy Kryzyszkowski, Dagmar Kutsar, Jeremy Leaman, Devi Sacchetto, Ene-Margit Tiit, Wielislawa Warzywoda-Kruszynska

7.3.2.4 *Comparing Family Policy Actors*, n° 3, 2002 (pp 89 pdf), edited by Louise Appleton and Linda Hantrais

Contributors: Peter Ackers, Louise Appleton, Paul Byrne

7.3.2.5 *The Employment Relationship and Family Life*, n° 4, 2003 (pp 78 pdf), edited by Peter Ackers

Contributors: Peter Ackers, Mònica Badia i Ibañez, Roberta Guerrina, Kait Kabun, Devi Sacchetto, Elizabeth Such

7.3.2.6 *Changing Family Structure in Europe: new challenges for public policy*, n° 5, 2003 (pp 98 pdf), edited by Marie-Thérèse Letablier and Sophie Pennec

Contributors: Anthony Abela, Olivier Büttner, Ingrid Jönsson, Kati Karelson, Dagmar Kutsar, Valentina Longo, Mária Neményi, Ene-Margit Tiit, Olga Tóth, Jutta Träger

7.3.2.7 *European Case Studies in Family Change and Policy Practice*, n° 6, 2003 (pp 122 pdf), edited by Louise Appleton and Linda Hantrais

Contributors: Moira Ackers, Mònica Badia i Ibañez, Olivier Büttner, Julia Griggs, Kati Karelson, Valentina Longo, Elizabeth Monaghan, Olga Niméus, Katre Pall, Malgorzata Potoczna, Lucyna Prorok-Maminska, Devi Sacchetto, Elizabeth Such, Judit Takács, Dimitra Taki, Jutta Träger, Spyridon Tryfonas

7.3.2.8 *Comparing Family Change and Policy Responses in Europe*, n° 7, 2003 (pp 144 pdf), edited by Linda Hantrais

7.3.2.9 Policy Learning Case Studies, Dissemination Conference, 3 April 2003, pp 31 (pdf)

7.3.2.10 Project Tables (Word)

1. Fertility, life expectancy and migration – 15 tables
2. Family formation and dissolution – 16 tables
3. Gender relations – 53 tables
4. Intergenerational relations – 12 tables
5. Social spending – 8 tables

Agreed deliverables and status

Description	Status
1.1 Training in cross-national research methods – workshop	Completed
1.2 Critical review of policy contexts – published papers	Completed
1.3 Policy actors and family impact policies – published papers	Completed
1.4 Comparative analysis of family factors in policy reactions to change – published papers	Completed
1.5 Policy findings – web report	Completed
2.1 Training in cross-national research methods – workshop	Completed
2.2 National and comparative analysis of factors influencing family decisions – published papers and journal articles	Completed
2.3 Policy findings – web report	Completed
3.1 Policy learning case studies – working paper and journal articles	Partially completed
3.2 Policy findings – pamphlet	Completed
3.3 Cross-national research methods – published papers and articles	Partially completed