



InnCARE

Final conference

Childcare and Eldercare Policies in Changing Times: Lessons from the Czech Republic and Norway

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Social Investment in children or care for older people? Care policies in European welfare states

Keynote Speech

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Starting Point

- Since late 1990s policy orientation to ‚Social Investment‘ concept in European welfare states (Morel, Palier & Palme 2011)
- Basic idea: Linking social policy aims with economical aims
- Main focus on investment in the human capital of children in early childhood (Jenson & Saint-Martin, 2003)
- Welfare states may be faced with interest conflict: ‚social investment‘ in children versus spending for long-term care for seniors (Cantillon & Van Lancker 2013)

Main Research Questions

1. How do welfare states combine their policy towards public childcare provision with their policy towards public eldercare provision?
2. In how far are welfare states more generous in the field of childcare than in the field of eldercare?
3. How can we explain cross-national differences between welfare states concerning the similarity/difference regarding their generosity towards childcare on one hand, towards eldercare on the other?

State of the Art

Implementation of the ‘Social Investment’ concept in European Welfare States

- Limited and hesitantly (De La Porte & Jacobsson, 2011)
- Often path dependent; but path departure in Germany, France, Belgium and The Netherlands (Nikolai, 2011)

Two different strands of the ‚Social Investment‘ concept (Morel, Palier & Palme 2011):

- ‚Social-democratic ‘ perspective – main focus more on social rights of children and older people
- Neo-liberal „Third Way“-main focus more an economic perspective and children as a „productive“ factor

THEORETICAL FRAMEWORK

The theoretical approach of the „Care Arrangement“ (Pfau-Effinger, 1998)

- The approach stresses the role of cultural ideals about care, social, economic and demographic factors, actors and power relations for the explanation of cross-national differences with regard to care policies.
- The general Care Arrangement in a society may be based on a specific Childcare Arrangement and a specific Eldercare Arrangement, which resemble each other or differ with regard to their cultural basis.
- Pressure from social, economic and demographical development may be similar or differ between welfare states.
- However, it should be considered that the relevant actors in welfare states perceive the pressure on the basis of the main cultural ideas about care in the society and among political actors.

Definition of „culture“

Multi-level concept of culture (Pfau-Effinger, 2005)

- ‚Culture‘ as a system of collective ideas at the macro level relating to the „good“ society and (morally) „good“ behavior;
- ‚Cultural ideas‘ include cultural values, ideals, belief systems; potentially fragmented, contested, contradictory and changeable.
- Culture at macro level offers action orientation to actors on micro and meso level, but does not determine action.

Theoretical framework – main assumptions (1)

- The relationship between childcare policy and eldercare policy differs substantially between different types of welfare regimes (according to classification approach of Esping-Andersen, 1990; Ferrera, 1996; Fenger, 2009)
- The relationship between childcare policies and eldercare policies tends to be more balanced in the Care Arrangement of social democratic welfare states, while in other types of welfare regimes, the political support of public childcare might prevail.

Theoretical framework – main assumptions (2)

Explanation of my main assumptions in the context of historical development of European “Care Arrangements”

Social-democratic welfare states

- Long established cultural tradition towards welfare state responsibility for all kinds of care, and towards gender equality (Anttonen & Sipilä, 2005).

Other types of welfare states

- Stronger tradition of a cultural orientation towards family care, change since the 1990s in part based on cultural ideas about gender equality;
- gender-egalitarian cultural ideas more related to childcare than to eldercare;
- also, influence from organised interests of parents of small children on care policy may be stronger than influence from interest groups for eldercare;
- social investment concept might have played a role.

Typology of care policies

Ideal-types of the relationship between generosity of care policy towards childcare and generosity of care policy towards eldercare

Types	Indicators
Type 1: Balance between public care policies at higher level of generosity	Similar degree of generosity at high or medium level in policies towards child care and eldercare
Type 2: Dominance of a social investment-concept	Generosity of child care policy at medium or high level, and child care policies show a higher degree of generosity than policy towards eldercare
Type 3: Dominance of a care related orientation	Generosity of eldercare policy at medium or high level, and public policies towards eldercare show a higher generosity than child care policies
Type 4: Balance between public care policies at low level of generosity	In general low level of generosity

FINDINGS OF EMPIRICAL STUDY

Empirical base: cross-national comparative study

Empirical study:

- **DFG- Project FAMICAP (German Research Council),**
Comparative analysis of care policies towards eldercare in 11 European welfare states, Chair: Birgit Pfau-Effinger
- **EU-Project FLOWS:** Comparative analysis of care policies towards childcare in 11 European welfare states, international EU-project in the 7. FP, (Chair: Per H. Jensen, Aalborg University; Leader of 3 WP and of Hamburg Team: Birgit Pfau-Effinger).

Methodological approach

Comparative analysis of care policies at level of institutional regulation

Advantage of this procedure to the measurement of care policies on the basis of care structures or welfare state spending:

- Care structures and welfare state spendings are influenced by take-up rates of people in need of care, while analysis of institutional regulation is a direct measure of political decisions

Limitations:

- More difficult to find quantitative measures;
- some welfare states might not place enough effort in implementing their institutional regulation, which may particularly be the case if the policy does not give individual rights to the citizens.

Methods: Document analysis of public institutional regulation, and public databases (e.g. MISSOC).

Methodological Approach

Cross-national analysis of institutional regulation of care policies in welfare states

Measurement of generosity of policies towards public child care (3 levels) in two dimensions

- Generosity related to access to public funded child care;
- Average share of parental co-payment to the care costs

Measurement of generosity of local welfare systems towards eldercare (3 levels) in two dimensions

- Generosity related to access to publicly funded eldercare
- Average share of co-payment of welfare state

Weight policy generosity towards access 1,3 and generosity towards co-payment 1,0

Measurement of generosity in childcare policy

- High generosity: Comprehensive support of the access of children age one to school age to public daycare for children, on the basis of an individual right to public daycare or an obligation of the welfare state to offer each child age one to school age public daycare, and the state pays more than half of the actual costs for the public childcare.
- Medium degree of generosity: Comprehensive support of the access of children age three to school age to public daycare for children (definition see above), and the state pays more than half of the actual costs for the public childcare.
- Low degree of generosity: Access to public childcare limited to small groups of children with a particularly high need for care, and/or the state pays less than than half of the current costs for public daycare.

Measurement of generosity in eldercare policy towards access to publicly financed care

- High generosity: Relatively comprehensive support of the access of seniors to public long-term care, on the basis of an individual right to public long-term care or an obligation of the welfare state to offer each senior in need of care public long-term care; only people with relatively low care need or relatively high income may be excluded.
- Medium generosity: Access of seniors to public long-term care, on the basis of an individual right to public long-term care or an obligation of the welfare state to offer each senior in need of care public long-term care, but access restricted to people with at least medium degree of need for care, or to people with at maximum medium income, or to people with dementia with low need for physical care.
- Low generosity: A low degree of generosity restricts the access to care to specific low income groups or older people with very high care need.

Measurement of generosity in eldercare policy towards the share of public co-payment to publicly financed care

- High generosity: The average contribution that the state pays for care is more than two third of the actual costs for care.
- Medium generosity: The average contribution that the state pays for care is at minimum one third and at maximum two third of the actual costs for care.
- Low generosity: The average contribution of that the state pays for the care is less than one third.

Table 1: The interaction of policies towards childcare and long-term care in 11 European welfare states

Country	Generosity of policies for public childcare	Generosity of policies towards eldercare	Difference between levels of generosity (childcare policy – eldercare policy)*
Denmark	High	High	0
Finland	High	High	0
Germany	High	Medium	-1
France	High	Medium	-1
UK	Medium	Low	-1
Ireland	Low	Low	0
Spain	Medium	Medium	-1
Italy	Medium	Low	-1
Estonia	Medium	Low	-1
Czech Republic	Medium	Medium	-0
Hungary	Medium	Low	-1

* Result with negative value = Dominance of childcare orientation in care policy, Result with positive value = Dominance of eldercare orientation in care policy, **Source: EU-Project FLOWS, 2014, DFG project FAMICAP, 2017**

Table 2: Types of care policies in different types of welfare states

Types of care policy	Type of Welfare regime (Esping-Andersen, 1990; Ferrera, 1996, Fenger, 2009)				
	Social - democratic	Conserva- tive	Liberal	Mediterranean	Post Socialist
Type 1: Balance between care policies at medium or higher level	Denmark Finland			Italy	Czech Rep.
Type 2: Dominance of child-oriented „Social Investment“ care policy		Germany France	England	Spain	Estonia Hungary
Type 3: Dominance of an eldercare oriented care policy					
Type 4: Balance between care policies at low level			Ireland		

DISCUSSION AND CONCLUSION

Findings and discussion

In many European welfare states, care policy seem to offer stronger public support for extra-familial childcare than for extra-familial eldercare.

The relationship between childcare policy and eldercare policy differs between social democratic and other types of welfare states:

- it is balanced at high level of generosity in social-democratic welfare states.
- In other types of welfare states more a social investment perspective is dominant.
- However, there is a mixture between both in the Mediterranean and Post Socialist type of welfare regime.

Findings and discussion

- The care policy balance in the Care Arrangements of the social-democratic welfare states could be explained with path dependence of the cultural orientation of population and policy towards state gender equality and state responsibility for all kinds of care, and the corresponding care policy tradition since the 1960s/1970s (for example Lundqvist, 2015).
- The higher generosity of care policy towards public childcare in comparison to generosity towards eldercare in other welfare states might be caused by relatively late start of cultural change towards gender egalitarian ideas, and with the stronger power that parents with small children have in comparison with older people in need of care to push through their interests.
- There seems still to be a trend to extend social rights and infrastructure with regard to eldercare, and more balanced Care Arrangements on the basis of a medium or higher generosity (Germany since 2016).

Conclusion

- Besides welfare states of the Social-democratic type of welfare regime, many welfare states seem to give childcare policy a higher priority in comparison with eldercare policy in their respective „Care Arrangement“.
- This might mean that many welfare states in their care policies give priority to a „productivist“ orientation on the basis of the „Social Investment“ concept and somewhat neglect the aim of the wellbeing of citizens in older age.
- I suggest to focus in the discourse about care policy more on criteria of social rights, people’s participation, and wellbeing in all stages of their life, and on social equality on the basis of gender and class, instead of applying „productivist“ cultural ideas that treat people more as production units .

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MANY THANKS FOR YOUR ATTENTION