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From the cradle to the grave? Social policy in diverse temporal and spatial contexts
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The life phase of family care as a social risk and its coverage in pensions: international variation and change

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Point of departure

- life phase of family care = social risk due to interrupted or reduced labour-market participation
- variety of changes in social policies with regard to family care, also in old-age pensions
- central to current discourses on pensions and their reforms: the relevance of work as gainful employment for building up pensions
- family care work either largely disregarded or constructed as “foreign” to pension systems
- these empirical and theoretical limitations are hindering a proper understanding of pensions and pension reforms in general, and family care related social risks in old age in particular

Research gap on family care work as part of pensions entitlements

- Conceptual limitations:
 - Focus on labour (de-commodification, Esping-Andersen) and family dependencies (de-familialisation, Lister)
missing and delivered here: family care work entitlements, understood gradually
 - Family care work *traditionally* as implicit part of social rights concepts (Marshall)
missing and delivered here: explicitification after change into *semi-formal work* (Pfau-Effinger) and *individual* entitlements (Frericks)
- Empirical limitations:
 - Rare data on welfare regulations on this focus: delivered here
 - Missing and applied here: method to analyse welfare regulations

Research questions

- To what extent do European welfare states cover family care work in their pension systems?
- How much has this changed in recent decades?
- And how can the inclusion of family care work in pension systems and its development be understood in the context of the overall logics of different pension systems and their development?

Assumptions with regard to international differences

- Comparative welfare state literature suggests that welfare states correspond to regime types independent from the focus of analysis:

“The general consensus in the field on the basis of the gender-oriented typologizing is that the countries of the EU cohere into five main groupings in terms of their family/gender model.” (Daly 2020: 40).
- Comparative studies on specific family policies reaffirm the country grouping

Assumptions with regard to international differences

Regime type	Relevant regulation principle	Assumed pension entitlements for family care work	Countries
Social democratic	egalitarian social order and pensions in the form of the residency-based 'people's pension'	NO	DK SE
Liberal	egalitarianising through market mechanisms; minimal state interventions	NO	UK
Conservative	family as the main carer: care work is traditionally covered via the family breadwinner and family membership	YES	DE FR
Mediterranean	family as the main carer: care work is traditionally covered via the family breadwinner and family membership	YES	IT ES
Post socialist liberal	egalitarianising through market mechanisms; minimal state interventions	NO	EE CZ
Post socialist conservative	family as the main carer: care work is traditionally covered via the family breadwinner and family membership	YES	HU

... but

- assumptions for this focus not tested
- First studies show that an analytical focus other than on decommodification brings forth other divisions among countries than the 'regime types' (Saraceno & Keck 2010; Frericks et al. 2016)

Assumptions with regard to change

Mode of change	Assumptions	Assumptions for our analysis
Adult worker model (Lewis)	increasing importance of the adult worker model in European welfare states leads to a decreasing relevance of care work for social rights entitlements	in countries where in the past care work formed part of pension entitlements, the extent of this coverage has decreased, in those in which care work played no role in the past, it has not gained any importance
Retrenchment (Starke)	financial pressure on welfare states has led to a decrease in welfare states' 'gifts'	See AWM
Path dependency (Esping-Andersen)	differences, and with that the division among countries, are more or less permanent	no relevant developments

... but

- Change in the significance of care work in social rights has scarcely, and surely not systematically, been comparatively investigated
- Studies on the significance of care work suggest that welfare states, in regard to care work, have greatly changed, and that social rights for care work have been extended (Knijn & Kremer 1997, Pfau-Effinger 2004)
- According to initial results however this is not true for all countries or regime types and they might develop differently (e.g. Mediterranean countries, Naldini & Jurado 2013)

Research design 1

- systematic quantification and mapping of family care work entitlements for 10 European countries by applying the new *Method for systematic comparison of qualitative data (SCQual)* (Frericks 2021)
- Analytical focus on pension systems set up to reach *full* pensions (versus poverty preventing pension, see Marshall 1963, Frericks 2013)
- public pensions, and where relevant additionally the *obligatory* supplemental schemes (CZ, DK, EE, FR, SE, UK)
- Two points in time (2020 and 1993)

Research design 2

- Explicit entitlements for familial care work
- Three family dimensions: partner, child/ren, other family members
- Only for children: status-rights included but special care related entitlements excluded
- Weightings depending on further conditions (e.g. household)

Results: Differences in pension coverage of family care work in Europe, 2020

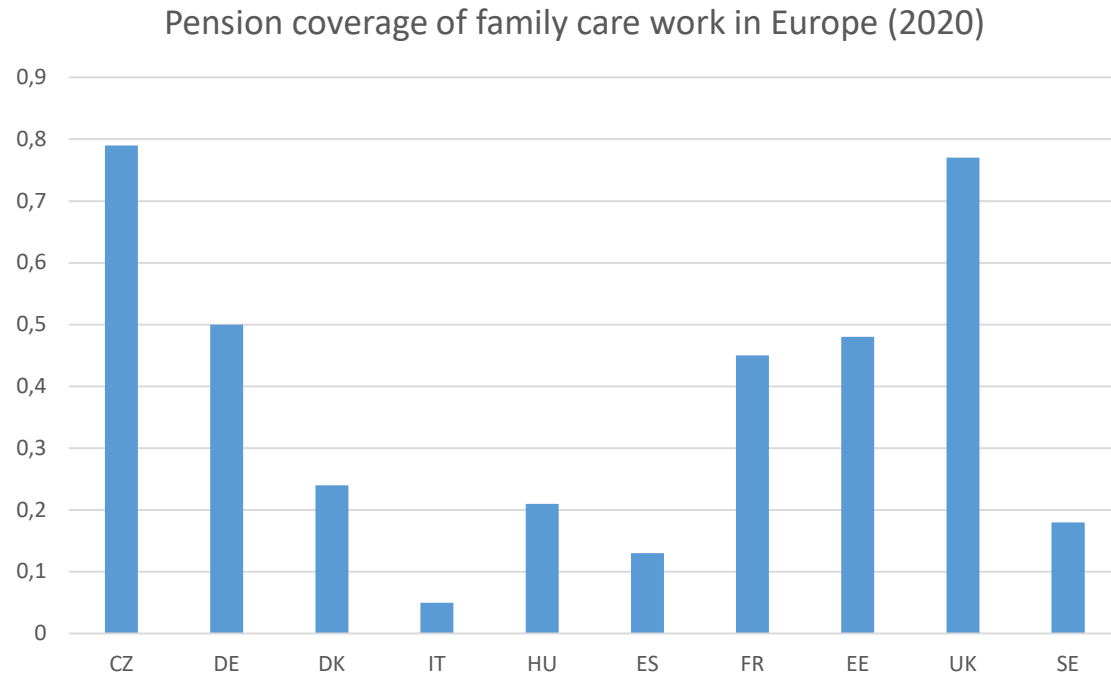
	Partner	Children	Other	Total
Czechia	0.30	0.19	0.30	0.79
Denmark	0.11	0.02	0.11	0.24
Estonia	0.18	0.12	0.18	0.48
France	0.14	0.17	0.14	0.45
Germany	0.16	0.18	0.16	0.50
Hungary	0.06	0.09	0.06	0.21
Italy	0.00	0.05	0.00	0.05
Spain	0.02	0.09	0.02	0.13
Sweden	0.00	0.18	0.00	0.18
UK	0.30	0.17	0.30	0.77

0 = no entitlements

1 = full pensions based on family care work only

total = added values

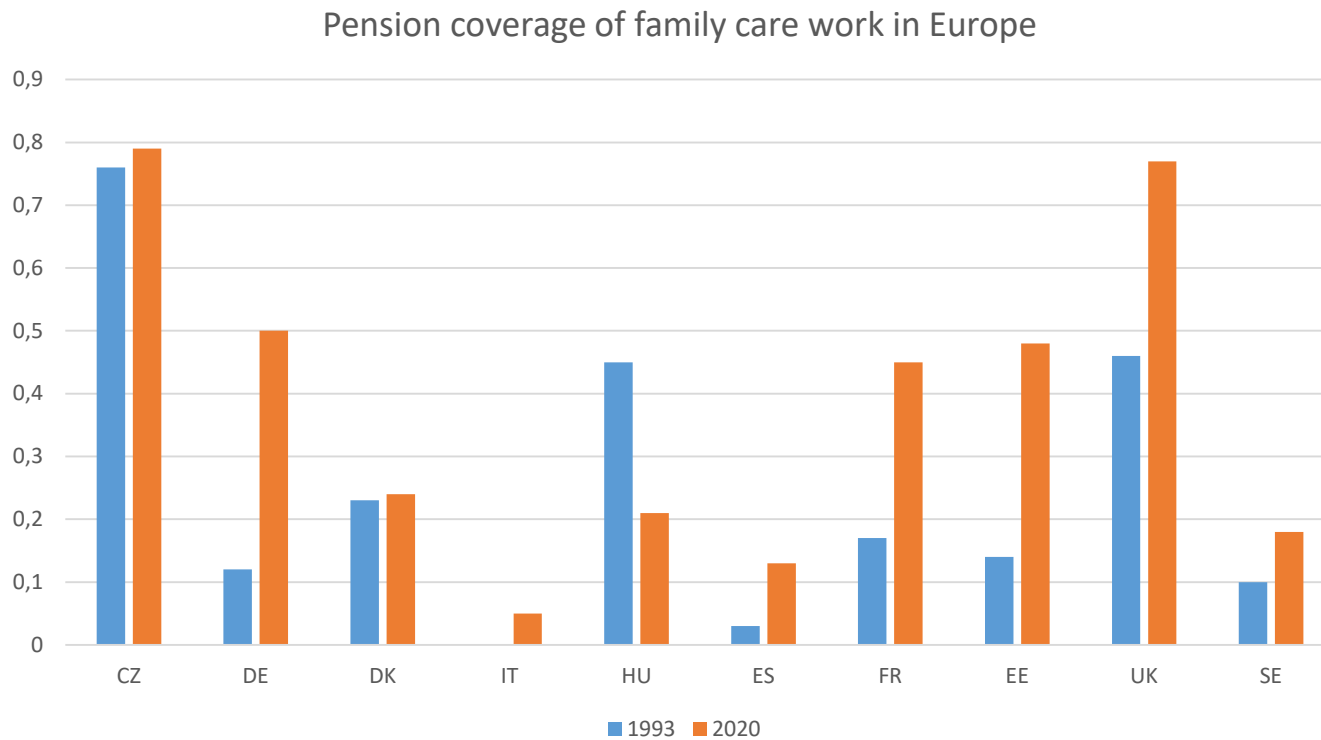
Results: Differences 2020 in total



Results: Differences

- in 2020 all ten countries included care work in the calculation of old-age pensions
- the countries, in the coverage of familial care work in pensions, group themselves differently than they do in the usual regime typology
 - Czechia + the UK between 0.7 and 0.8
 - Germany + France + Estonia between 0.4 and 0.5
 - Denmark + Hungary between 0.2 and 0.3
 - Sweden + Spain between 0.1 and 0.2
 - Italy at 0.05.
- They do not correspond to the assumptions based on this typology
 - (postsocialist) liberal and social-democratic countries show in part a very high level of coverage of family care work
 - and clearly higher than in the conservative-corporatist and postsocialist conservative countries
 - Mediterranean countries cover family care work the least

Results: Change



Results: Change

- All groups change between 1993 and 2020; neither in 1993 country groups that correspond to the acknowledged regime types
- various developments: marked rise in Germany, Estonia, France and the UK; marginal rise in Denmark, Italy and Czechia; markedly reduced total value in Hungary
- all the study countries except Hungary have raised the degree of pension coverage of family care work
- All assumptions confuted (decrease of entitlements, path dependency)

Concepts in covering care work in contribution-based pension systems

Instrument / Concept	Principle (Frericks 2012)	Empirical examples
Additional entitlements (added to that from simultaneous labour-market participation)	Care for elderly family members and children as societal contribution, i.e. the fulfillment of the 'intergenerational contract'	Czechia, Germany, France (for childcare)
Replacing entitlements (replacing missing contributions from labour-market participation)	Reduction of the disadvantages in social rights due to interrupted or reduced labour-market participation due to family care work	Estonia, France for childcare up to 2004 (later additive); Germany for care for elderly family members
No entitlements for caregiving	'foreign' to the nature of pension insurance, logic of private insurances	nowhere

Family care work and social risks in old-age

- family care work entitlements are increasing
- currently, family care work provides rather robust entitlements to pensions in most countries
- family care work with regard to children is often differently covered than with regard to long-term care
- family care work entitlements are differently framed and legitimated
- whether family care results in social risks in old age strongly depends on the position of public and mandatory pensions in future pension mix (marketization)

Thank you for your attention!

Publications related to the presentation:

Frericks, P. (2022), Family Care Work Coverage in Pensions: Mapping and Contextualizing International Variations and Developments, *Social Politics*. DOI: 10.1093/sp/jxac010.

Frericks, P. (2021), How to quantify qualitative characteristics of societal differences: A method for systematic comparison of qualitative data (SCQual), *International Journal of Social Research Methodology*. DOI: 10.1080/13645579.2021.1883537.

Frericks, P. (2012), Gender-equalising and gender-neutral policies and their pitfalls: A typology of the gender dimensions of social policies, *European Journal of Social Security* 14, 1: 2-20.