

Cross-National Research Papers

Sixth Series:

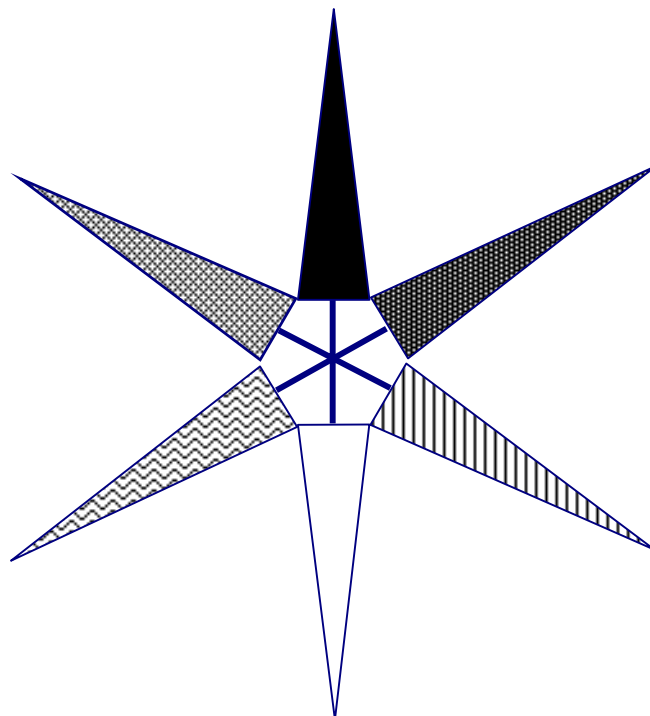
Improving Policy Responses and Outcomes to Socio-Economic Challenges: Changing Family Structures, Policy and Practice

1. Conceptualizing and Measuring Families and Family Policies in Europe

Edited by

Louise Appleton

Linda Hantrais



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Series Editor's Foreword

The papers included in this sixth series of *Cross-National Research Papers* build on the contributions published in the fifth series. They develop with greater breadth and in greater depth work previously carried out on the relationship between socio-demographic trends and policy responses in Europe.

The materials from which the present papers are derived were compiled for a three-year research project funded by the European Commission under Framework Programme 5 (HPSE-CT-1999-00031). The research extended earlier work carried out for the European Commission, Directorate General 5, Employment, Industrial Relations and Social Affairs, between 1997 and 1998.

The primary aim of the IPROSEC project, launched in 2000, was to inform policy by developing a greater understanding of socio-demographic change in selected European Union member and applicant states, the social and economic challenges such changes present, and the policy responses formulated by national governments and at European level. The research was particularly concerned with changing family structures and relationships. The project team undertook to observe and analyse the policy process, inputs, outcomes and impacts, with a view to assessing how policy learning occurs, and how, in turn, policy development influences socio-demographic change. In keeping with the aims and objectives of the Cross-National Research Group, which was established in 1985 as an informal network of researchers interested in the theory, methodology, management and practice of cross-national research on topics in the social sciences, the project was also designed to document the cross-national comparative research process.

The IPROSEC project brought together researchers from a range of disciplines, from different parts of the European Union and from three applicant states, with experience in carrying out cross-national comparative projects. The papers in this sixth series track the development of the project and provide an appropriate means of disseminating comments on the operation of each stage of the research, while also reporting interim findings.

Linda Hantrais

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1. Understanding Changing Family Structure in Policy and Practice

This issue of *Cross-National Research Papers* examines some of the methodological questions raised in the first stage of the Framework Programme 5 research project, entitled 'Improving Policy Responses and Outcomes to Socio-Economic Challenges: changing family structures, policy and practice' (IPROSEC). The papers discuss differences in social constructions of the key concepts used in the project, as well as problems of ensuring comparability when measuring socio-demographic change in the European Union across member and applicant states.

This introductory paper describes the aims and objectives of the IPROSEC project before going on to locate the research in relation to the wider context of cross-national theory, methods and practice (Hantrais, 1999a). It reviews critically the methodological choices that had to be made by the project team and their possible implications for the findings from the project.

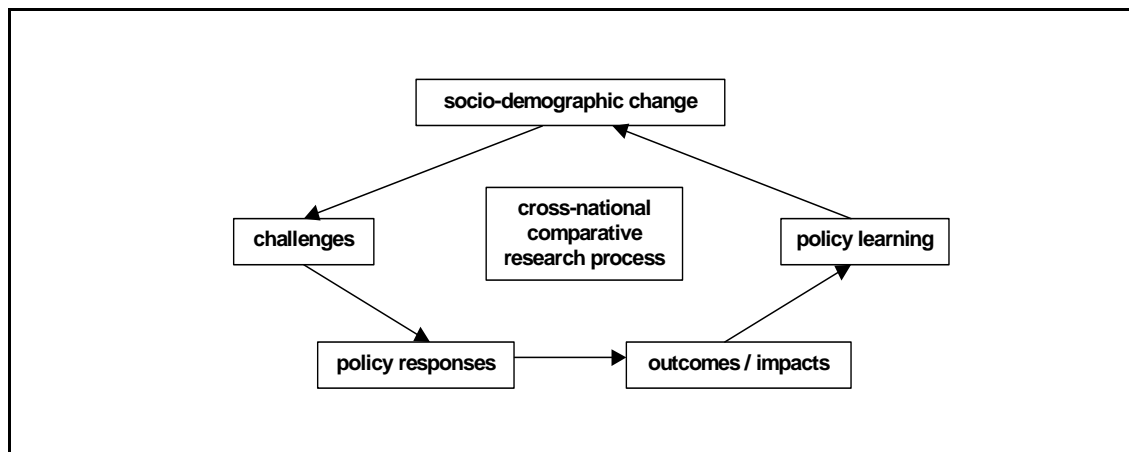
The first four issues in the series concentrate on stage one of the three-year project. Subsequent publications in the same series deal with questions arising in later stages of the research.

Research aims and objectives

The overall aims of the IPROSEC project, as illustrated in Figure 1.1, were to inform policy by developing a much greater understanding of socio-demographic trends, with particular reference to changing family structures and relationships, the social and economic challenges they present for European societies and their institutions, and the policy responses formulated by governments at national and European level.

The multinational team of researchers observed and analyzed policy outcomes and impacts from a comparative perspective in eight EU member states (France, Germany, Greece, Ireland, Italy, Spain, Sweden and the United Kingdom) and three applicant countries (Estonia, Hungary and Poland). They assessed how policy learning occurs, and how, in turn, policy development

Figure 1.1 Interactions between socio-demographic change and policy



influences socio-demographic change. More specifically, in the first stage of the research, the aim was to develop a greater understanding of socio-demographic change and policy responses in European societies from comparative analysis of national findings. The intention was to determine whether any patterning, or clustering, in terms of similarities and differences, could be identified in the ways socio-demographic change, social and economic challenges, and policy responses interact, with a view to identifying the factors shaping the policy process.

Previous large and small-scale studies at EU and national level have produced conflicting and inconclusive findings about the relationship between social and economic policy and socio-demographic change, in particular within households. The reason for their unsatisfactory results is that they have failed to isolate the factors motivating the decisions taken by individuals in different family situations and during different phases in their lives.

The general aim in the second stage of the research process was, therefore, to identify the relative importance of policy among the factors contributing to changing family structures in different national contexts by studying the motivation behind individual decisions taken about family matters. The comparative analyses serve, firstly, to identify similarities and differences in the ways in which decisions about family life are reached and, secondly, to determine how attitudes towards state intervention in family life differ between countries.

Many analysts have attempted to provide examples of good policy practice that could be transferred cross-nationally, for instance in the area of family-friendly measures at the workplace. It is rare, however, for a policy formulated in one jurisdiction to be directly transportable to a country with a different legal, political and socio-economic framework. EU social legislation affords numerous illustrations of attempts to extend policy solutions to individual member states through international agreements and obligations. In some cases, measures imported into another national body of legislation need little adaptation to conform to European law but, in others, EU directives may involve far-reaching changes that can be costly, are not necessarily always appropriate and may not produce the effect anticipated or sought. The aim in the third stage of the project was, therefore, to examine under what conditions policy solutions formulated in response to the challenges presented by socio-demographic change can be transported between countries.

Combining theoretical approaches

Although the IPROSEC project covered a relatively large number of countries and a broad range of topics, the intention was not, as in the universalist comparative research tradition, simply to track and map the development of socio-political and economic phenomena with a view to producing generalizations or normative models of behaviour. Such an approach assumes that universal characteristics can be identified in social phenomena, independently from a specific, cultural, context, which was not a hypothesis being examined by the research team. Nor did the IPROSEC researchers want to go to the other extreme, as in the culturalist tradition, of focusing on national uniqueness and particularism, and cross-cultural contrasts, differences or diversity, as this approach makes comparison and generalization across

societies very difficult, if not impossible. Exclusive use of the culturalist approach would, inevitably, have led to the conclusion that the concepts and values characteristic of a specific society could not be transported into another cultural or linguistic community. Such an outcome would have run counter to one of the central objectives of the project.

Rather, like the societalists, the IPROSEC project adopted an intermediate position. An attempt was to be made to situate phenomena in relation to their spatial and temporal location. While recognizing the diversity and mutual interdependence of social structures, systems were not being considered as unique. The project team were also interested in seeking to explain social reality with reference to variables that are extrinsic to the system, enabling more general or universal factors to be identified (Przeworski and Teune, 1970, p. 12). By analysing the relationship between the macro and the micro levels, the interaction between a plurality of causal factors can be identified, on the basis that actors cannot be separated from structures and *vice versa*, since both are socially constructed. Comparisons become possible due to the fact that each unit of observation has a systemic coherence and is part of a process, rooted in national specificity (Maurice, 1989), which was a central tenet of the IPROSEC team.

These different theoretical approaches to cross-national comparative research are not mutually exclusive (Hantrais and Mangen, 1996; Carmel, 1999; Hantrais, 1999a; Mangen, 1999). Indeed, the IPROSEC project provided an opportunity to demonstrate how in combination they could be mutually reinforcing.

Firstly, since the universalist approach involves trying to identify common factors that have explanatory power, it was relevant to the research. The IPROSEC project was investigating a variety of factors that may affect behaviour, which meant that it might be possible to identify constants from which extrapolations could be made to other similar national contexts. Secondly, since the culturalist approach requires an analysis of the ways in which cultural traditions contribute to the social construction of phenomena, it was also of interest for the IPROSEC project. The team was planning to undertake a fine-grain analysis in an attempt to understand how families and family policies are socially constructed in different socio-economic and political contexts. Thirdly, the societal approach implies that researchers are looking for societal coherence by analysing the relationship between social phenomena and their socio-cultural contexts. In the IPROSEC project, this approach was essential in demonstrating how and why all the components fit together, and how the policy process operates in different national contexts.

Methodological issues and solutions

The question has long been debated as to whether cross-national social research constitutes a distinct set of methods in its own right (Samuel, 1985). Cross-national researchers undoubtedly draw on most of the methods used in single-nation studies, while within-nation studies routinely compare manifestations of phenomena. Cross-national research does, however, frequently involve an additional dimension that is not necessarily present in single-nation studies, namely linguistic variation and a wider range of contextual factors.

Comparative projects across national boundaries thus raise a number of methodological questions for which solutions have to be sought. Since choices made at the design stage are likely to affect the conduct of the project and the interpretation of the findings, the IPROSEC team undertook to analyse and report on its own research process in pursuance of the original aims established by the Cross-National Research Group (Hantrais, 1985, p. iv). The main issues that have to be addressed in cross-national research projects can be summarized as follows:

- how to justify the management and team structure;
- how to account for the number and mix of countries/cases;
- how to select the most appropriate method of data collection and analysis;
- how to identify the most useful contextual factors for analysis;
- how to deal with conceptual equivalence in different cultural and linguistic settings;
- how to ensure comparability of data.

A number of these issues were addressed when the IPROSEC proposal was being drafted. Others arose, or became more salient, as the project moved into the data collection phase. Subsequent sections in this set of papers deal in some detail with issues concerning the social construction of the concepts and quantitative indicators used in assessing socio-demographic change and policy development. The second issue in the series looks more closely at contextual factors, with particular reference to time and space. The rest of this section, therefore, concentrates on the ways in which the remaining issues listed above were tackled in the early stages of the project.

JUSTIFYING THE MANAGEMENT AND TEAM STRUCTURE OF THE PROJECT

A distinction is often made in cross-national research projects between the 'safari' method and the 'international team'. The safari research mode means that an individual researcher, or a small team of researchers, carries out the data collection and analysis in their own and, usually, one or two other countries. A culturalist or societal approach is likely to be adopted to deal with the small number of cases, entailing depth rather than breadth of analysis, in the search for contextual explanations of observed phenomena. At the other end of the spectrum, in the very large multinational studies, the universalist approach is often adopted with a view to searching for constants across a substantial number of cases. National informants and data sources, a common work plan, agreed concepts and measuring instruments and schedules are used to collect information on which to base generalizations.

IPROSEC is an example of a medium-sized project, in which the members of an international team conducted the research in their own countries. The research was organized around a co-ordinating team, located in the United Kingdom, with partners and research assistants based in each of the participating countries. The advantage of the IPROSEC project team structure was that it allowed breadth to be combined with depth. The number of countries concerned is not so large that fine-grain analysis was unmanageable. Nor was it so small that only bilateral comparisons were possible. All the team members had native knowledge of the language and culture of the country in which they were working and easy access to materials and informants. All the

non-British researchers were able to communicate in one of the project's working languages (English, French, German or Spanish).

A disadvantage of the structure used in the IPROSEC project structure may be that, as insiders working on their own countries, team members were likely to be less objective than external observers. In cases where researchers are working on a country that is not their own, because they are able to observe the familiar from a new angle as outsiders, they may be able to gain an understanding of phenomena that is not obvious to the insider. They are also more likely to be receptive to differences. The culturally and linguistically determined assumptions of researchers working on their own country may, however, be called into question when they are confronted with different perspectives through participation in an international team, which is part of the learning process in cross-national projects.

One way of guarding against the bias that can be created by the cultural assumptions team members bring with them is, as far as possible, to recruit researchers who have experience of living and working in different countries and cultures, and a command of different languages, and who have been involved in international projects and networks. Most of the participants in the IPROSEC project had previously co-operated with the members of the co-ordinating team and, therefore, met these criteria. Other solutions adopted in the project to overcome possible bias were to ensure the constant exchange and validation of materials. This was achieved by making provision for academic visits and for what were called 'cross-border interviews', whereby team members participated in interviews being conducted in a country other than their own.

JUSTIFYING THE NUMBER AND MIX OF COUNTRIES

The number and mix of countries to be studied is likely to be determined not only by the aims of the study but also by the resources available, including the expertise of the team members. The sponsors of the research may have their own, sometimes political, reasons for insisting on the inclusion of certain countries. The European Commission is generally looking to ensure that 'less favoured' member states are well represented, even though this may not necessarily provide the best mix with regard to the research parameters.

In line with the concept of 'bounded variability' (Rose, 1991, p. 447), based on the idea that the number of possible variations in a phenomenon are not limitless, researchers must determine how many units of analysis are needed to ensure a balance between the number of different national cases considered necessary for representativeness and for optimal coverage of variability. As already argued, small-scale studies are most appropriate for researchers adopting a culturalist approach. They do not enable the conclusion to be drawn that one or another of them presents an aberrant case. The advantage of the small-scale study is that it enables the researcher to investigate a much larger number of contextual variables, but it may not be necessary to study a phenomenon in all EU member and applicant states to identify a sufficient range of configurations to enable meaningful inferences to be drawn.

In the case of the IPROSEC project, it was not feasible to include all EU member and applicant states for practical reasons. Nor would it have been

appropriate, given the aims of the research and the requirements of the European Commission, to limit the project to only two or three countries. A form of stratified sampling was, therefore, adopted to select countries according to groupings based on the timing of their membership of the EU. The eight EU member states and three applicant states were selected to represent different waves of membership of the European Economic Community, European Community and European Union. They were also chosen to include units of different population size and density, with varying socio-economic, cultural and political environments and at different stages of economic and welfare development, as shown by the indicators presented in Table 1.1.

Table 1.1 Characteristics of IPROSEC project countries

Country and welfare type	Land area (km ²)	Population size (millions), 2000	Population density (inhabitants/km ²), 2000	GDP at market prices in PPS, 2000	Per capita spending on social protection in PPS, 1998
<i>EEC first wave members</i> Continental welfare system					
France	543 965	58.6	107.7	1346.6	6 418 ^P
Germany	356 718	82.1	230.0	2048.8	6 459 ^P
Italy	310 316	57.5	190.8	913.3	5 292 ^P
<i>EC second wave members</i> Universal welfare system					
Ireland	68 895	3.7	53.3	77.6	3 372
UK	241 751	59.9	244.0	990.1	5 306 ^P
<i>EC third wave members</i> Latin rim welfare system					
Greece	131 625	10.5	79.7	106.1	3 139 ^P
Spain	504 790	39.3	77.9	531.6	3 224 ^P
<i>EU fourth wave members</i> Nordic welfare system					
Sweden	410 934	8.8	21.5	210.1	6 515
<i>Applicant states</i> Post-Soviet welfare systems					
Estonia	45 227	1.5	32.3	135.2	n.a.
Hungary	93 030	10.2	109.2	109.5	n.a.
Poland	312 677	38.6	123.6	311.9	n.a.

^P provisional data.

Sources: CIA, 2000; Eurostat, 1999b, table D3; Eurostat/ESSPROS, personal communication.

Just as national territorial boundaries shift, membership of international organizations undergoes change. In the case of the EU, the four waves of EU membership between the 1950s and 1990s altered not only the size but also the socio-cultural structure of the Community and Union. Progressively, to the Continental core were added Denmark, Ireland and the United Kingdom, with their universal welfare systems, then the Mediterranean states, with their less developed social protection provisions, and the Nordic states with their universalist and egalitarian approach to welfare.

Membership of the EU also affected the internal structure of the countries concerned, as illustrated by the Irish case (see FitzGerald in the second issue of papers in this series). The addition of new member states from Central and Eastern Europe in the twenty-first century is expected to bring further changes in the shape of social Europe (European Commission, 1998a; Hantrais, 2000a). The three applicant states included in the project shared the experience of having undergone the transition from the Soviet era. They also had in common that they had reached an advanced stage of preparation for EU membership, involving considerable internal restructuring of their social, economic and political systems to enable them to meet the criteria laid down, as reported in this and the contributions in the second issue of papers in this series.

The unifying factor across the 11 countries was their membership (potential or actual) of the EU. Although the EU context was imposed on the project due to the source of funding for the research, the advantage of using an international organization as the framework is that the countries in the project explicitly shared a common reference point. Belonging to the EU confers on them a certain identity of purpose. They all subscribe, at least in theory, to a common set of goals, as a condition of membership. Since a multilevel system of governance operates within the EU, the project was able to combine EU and national level perspectives. For example, individual member states are contributing to the formation of policy within international institutions while, at the same time, being obliged to ensure compliance at national level through their own legislation and institutions (Hantrais, 2000a, 2000b).

Nations, or nation states, afford a convenient unit of analysis for comparative studies since they usually possess clearly defined territorial borders, and their own characteristic administrative and legal structures (Byrne, 1999). In the case of the IPROSEC countries, national governments are directly represented on the EU's supreme decision-making body, the Council of Ministers, and through nationally elected members of the European Parliament. Even in federal states, such as Germany, central, rather than regional or local, government is represented in Brussels.

'Nation' is, however, a problematic concept. National borders shift, and it cannot be assumed that they necessarily correspond to cultural, linguistic and ethnic divisions, or to a common sense of identity. 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. As shown in the first issue of the previous series of *Cross-National Research Papers*, and in the paper contributed by Dieter Eißel and Jeremy Leaman to the second issue in the present series, Germany provides a good illustration of the many contrasts to be found within a single nation. Unification created a national unit in which internal diversity was greater

in some respects, particularly as far as socio-demographic trends were concerned, than that observed across the EU. Internal diversity may be a source of problems for the comparative researcher, but it does mean that nations provide a wealth of material for a multilevel and multivariate analysis, on which to base observation, explanation and evaluation of the social situation.

Another complication in taking the nation as the context for comparative policy analysis arises from the way the policy formation process operates both at national and supranational level. Non-governmental organizations, issue networks, policy communities and interest groups are playing an increasingly important role as policy actors co-operating across national boundaries. By including among its key informants in the first stage of the project political actors at different levels of government as well as civil society actors, the IPROSEC team attempted to take account of the impact of these differences on the policy process.

Notwithstanding their internal variations, the mix of countries included in the project lends itself to an analysis of both similarities and differences, not only at the level of outcomes but also at that of process. Although the countries in the IPROSEC project shared their membership, or potential membership, of the EU, the research team was seeking to identify patterns of socio-demographic behaviour, as previously observed for the 15 EU member states in the mid-1990s and reported in the first issue in the fifth series of papers (see graphs 1.4, 2.6, 3.7 and 4.4).

DATA COLLECTION AND ANALYSIS

In research that crosses national boundaries, usually methodological compromise is inevitable. Much of the comparative work undertaken has to be carried out within very tight time frames and strict budgetary limits. Funding is rarely, if ever, open-ended, and most research proposals have to be tailored to fit the resources available. Due to these constraints and the many, often conflicting, interests involved, the material collected in international projects for the purposes of comparison is not always strictly comparable, and the abundant data assembled are frequently only partially analysed and exploited. One way of overcoming many of the problems that have to be dealt with at the data collection phase is to use a combination of methods, or triangulation, to validate information. The main methods used by cross-national researchers include:

- secondary analysis of large multinational datasets;
- contextual data collection and analysis, supported by documentary evidence (grey literature, diaries, biographies) (Bendikat, 1996);
- elite interviews with key informants, surveys, vignettes (Soydan, 1996) and policy simulation (Eardley, 1996; Mangan, 1999).

As part of a European programme, the IPROSEC project was subject to the usual constraints on time and funding. The research team, therefore, selected its methods of data collection and analysis in accordance with the resources available. The first stage of the project involved three approaches to data collection: documentary, secondary analysis of large-scale data and interviews with key informants.

The decision was taken to carry out secondary analysis of large-scale harmonized data (primarily published data from Eurostat), supplemented wherever possible by national data on socio-demographic change, as a means of tracking trends in family formation and dissolution, and recording macro level changes in living and working arrangements and social protection provision.

The main topics covered were:

- fertility, life expectancy and migration;
- family formation and dissolution;
- gender relations;
- intergenerational relations;
- employment patterns and labour market activity;
- social protection spending and benefits.

Much of the data required had been collected up to and including 1995 for the 15 EU member states for a study carried out for the European Commission (DGEMPL) in 1997–98 on ‘Interactions between Socio-Demographic Trends, Social and Economic Policies’ (reported in the fifth series of *Cross-National Research Papers*). Partners in the eight EU member states were, therefore, asked to update their national data in cases where more recent Eurostat data were not readily available. The European Commission (1998a) had begun to include data on the applicant states in its demographic reports for some of the indicators included in the project. Partners in the candidate countries were asked to validate and supplement such data from national sources. Arrangements were also made to exchange materials with other Framework Programme 5 projects on related topics. The project team was interested in comparing trends across EU member states using indicators showing:

- population decline and ageing;
- changing patterns of marriage, cohabitation and divorce;
- the growth of lone parenthood;
- the growing proportion of reconstituted families;
- the growing proportion of one-person households;
- changes in the proportion of multigenerational households;
- changing gender relations at work, in society and in the home;
- changing family–employment relationships;
- changing intergenerational relationships with particular reference to living and caring arrangements.

Eurostat data are not unproblematic, as shown in the second section in the present volume, particularly when different sources are used from one country to another and when the definitions of particular statistical categories have changed over time. Time series data were especially problematic for the applicant states, since the statistics assembled during the Soviet era was considered to be unreliable (see Kutsar and Tiit in the second issue in this series of papers). As no satisfactory solution could be found to this problem, the datasets gathered together have to be used with extreme caution.

While national level tables were being compiled, partners were also collecting information about national policy contexts, drawing on policy documents, opinion surveys, scientific studies and media debates. Participants in the project were asked to respond to an agreed set of questions. This background information was intended to show to what extent issues concerned

with socio-demographic change have become matters for public debate, scientific research and policy development.

Three core questions were addressed in this part of the project, involving analysis of what the literature has to say about:

1. The challenges raised by socio-demographic trends for policy formulation;
2. The ways in which the issues raised by socio-demographic change are being addressed by policy actors in different national contexts;
3. The possible impact of social (including family) and economic policies on socio-demographic behaviour.

The fourth section of the present volume analyses the responses received to the second of these core questions.

This part of the project was intended to provide an indication of the ways in which different countries were responding to the trends identified by the quantitative data, with reference to:

- the (in)stability of the family as a unit;
- the (im)balance between what are seen as public and private responsibilities;
- the (non)targeting of support for families;
- changing education and training needs;
- the need to reconcile family and employment;
- the gender (im)balance at home and at work;
- changing obligations and responsibilities between the generations.

To complement and supplement the statistical and contextual data collected, a series of elite interviews were conducted with selected political, economic and civil society policy actors, including politicians at national and local level, government officials, representatives of employers, trade unions, service providers and NGOs. Although a common questionnaire framework was used across the participating countries, partners were asked to adapt their selection of interviewees and the formulation of their questions to capture the national situation. For example, in France, where family organizations play an important role in representing the interests of families at local and national level, it was necessary to devote several interviews to this group of actors. In Estonia, only a small number of key informants were required, since many of the leading policy actors are heavily involved in several decision-making bodies. The questions asked were designed to elicit views on a variety of issues:

- whether, or not, governments should and do intervene in response to changes in family structures and in family life;
- how governments manage the public versus private relationship;
- what policy options and instruments are available to governments;
- whether policy actors target particular family forms;
- what factors they take into account in reaching policy decisions;
- whether they consider the family impact of economic and social policies;
- whether they monitor the impact of policy on families;
- to what extent regional or local governments and NGOs have discretion in the area of family policy and, if so, whether provision differs across regions.

The materials collected 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.

Given the quantity of information being collected in the IPROSEC project, partners were required to provide explanatory notes and comments on national data and synopses of the responses to the policy context and interview questions. Word limits were imposed for the responses to the policy context questions, and budgetary constraints meant that funds were not available to allow full transcription of the interview materials, amounting to approximately 20 hours on average of recordings for each country. In both cases, the questionnaires provided the framework for analysing the data.

The analyses were circulated electronically to the partners for comment and validation, thus ensuring that all the partners were kept informed about, and involved in, each stage of the project. Visits by members of the co-ordinating team to the participant countries and by the partners to the UK enabled the team members to discuss in more detail specific features of the responses they were reporting, while also extending their own knowledge and understanding of the policy process in one another's countries.

SELECTING THE MOST APPROPRIATE CONTEXTUAL FACTORS

Another question that was relevant to the IPROSEC project team when considering the methodology for the study was how to select the most appropriate contextual factors for analysis. Given the mix of countries, and the need to ensure that potentially important explanatory factors were not neglected, but without the project becoming unmanageable, an attempt was made in the first stage to cover a wide range of contextual factors.

The possible contexts for analysis within nations are many and varied. The selection of contextual factors for the IPROSEC project was determined by the European Commission's remit and the central themes of the proposed research. The project fell within the European Commission's key action for 'Improving the Socio-Economic Knowledge Base' and, more especially, the theme of 'societal trends and structural changes'. The project was intended to have a clear policy dimension both at national and EU level. It was, therefore, necessary to take account of a wide range of policy contexts, many of which had been covered in previous work, though not necessarily for all the countries in the project.

Given the focus on socio-demographic trends, gender, age and generation were central and recurring themes throughout the research. Knowledge of each country's social, political, legal, administrative and economic institutions and structures was necessary to understand how the policy process operated. The cultural environment was of interest for the insights it could provide into the value and belief systems influencing decisions at macro and micro level.

In the national studies of families in the second year of the project, influences on family behaviour were examined and were situated in relation to a variety of factors:

- household finances, covering income from employment, social charges, fiscal arrangements, the cost of housing and of raising children;
- the economic climate, with reference to the state of the economy and the level of unemployment;

- the political climate and the government in power;
- the legal framework, covering prohibitive, permissive and proactive legislation, in relation to matters such as abortion, divorce, cohabitation, illegitimacy and medically assisted reproduction;
- social pressures to conform to particular norms for family behaviour;
- personal relationships and the availability of family support networks;
- perceptions of the impact of different family living arrangements on quality of life, access to education and training, housing, employment and leisure;
- the availability of social benefits and public support services, for example provision of child and elder care and medical services;
- the 'friendliness' or otherwise of the educational and working environment towards the family and women, and the flexibility of working time arrangements.

The contextual information collected in the first year of the project was needed to enable the IPROSEC team to situate the actors under observation in relation to their spatial and temporal environment, involving analysis of the relationship between the macro and the micro level. In line with the societal approach, the researchers were seeking to identify how different factors interact and, in their interpretation, to demonstrate how these interactions have been socially constructed.

The impact of methods on results

The discussion of methods in this paper has been undertaken in the knowledge that the methodological choices made at each stage of a research project affect the findings. Any bias that may have been introduced due to the constitution of the research team, the selection of countries and of contextual factors, the collection and analysis of data has been made explicit. For example, the *modus operandi* of the research team, whereby partners carried out the work in their own country, was dictated by the scope of the project and the financial constraints. Safeguards, such as cross-border visits and the constant exchange of materials, were, therefore, built into the design of the project to avoid the risk of 'insider' bias.

The decision to select countries representing different waves of EU membership was also taken with full awareness that the 'choice' would be critical in determining not only how the research process unfolds, but also the outcomes. Any similarities or differences revealed by a cross-national study may be no more than an artifact of the choice of countries. According to the principle of 'variable distance', developed by Georg Simmel (1980) at the beginning of the last century, the distance from the object under observation affects the way it is observed. A 'close-up' comparison of a social phenomenon within a country may reveal differences attributable to region, class, age, sex or ethnicity – for example in population ageing, gendered employment patterns or access to social rights – that may not be apparent when aggregated data at national level are being compared from a distance. What may emerge as significant differences between a small number of neighbouring EU member states may also pale into insignificance when Europe as a whole is compared to the less developed world. The close-up (culturalist), medium (societal) and

the long-distance (universal) views can all be justified, but it has to be accepted that they may each reveal different social realities.

By observing the countries selected in the IPROSEC project from different distances, both temporally and spatially, the intention was to try to identify groupings of member states that share certain characteristics with regard to particular socio-demographic phenomenon and political processes, while also assessing the position of individual countries in relation to a European mean. However, the project team remained alert to the fact that it is not possible to generalize from a small number of individual (national) cases on the basis of inferred causal relationships. Nor could they assume that, if the phenomenon selected is explained in one country by a particular combination of contextual factors, the same phenomenon in another country is necessarily due to the same causes. In addition, a specific policy will not automatically have the same outcome if applied in a different socio-economic context. However, if recurring patterns can be found within certain clusters of countries, both in terms of inputs and outputs, then it may be possible to justify some extrapolation of policy practices between countries that have undergone similar policy processes. The intention in the final stage of the project was to identify examples of good policy practice and to ascertain under what conditions it might be possible to implement policy solutions in different social, economic and political contexts across member states.

2. The Social Construction of Socio-Demographic Change

The overall aim of the first stage of the IPROSEC project was to develop a greater understanding of the factors contributing to socio-demographic change and the social and economic challenges it presents for policy actors in European societies. The project team observed how socio-demographic change is experienced in a number of member and applicant states in the European Union. They tracked the processes whereby policy decisions affecting families are reached and implemented in different policy contexts. The information gathered was intended to serve as one of the components contributing to an assessment of the extent to which policy solutions might be transported between countries.

A problem routinely encountered in cross-national comparative research is how to deal with conceptual equivalence in different cultural and linguistic settings. The approach adopted in the IPROSEC project took account of the ways in which cultural traditions contribute to the social construction of phenomena. An attempt was made to identify indicators of societal coherence by studying the relationship between social phenomena and their socio-cultural settings. A number of key concepts were selected for analysis in the early stages of the IPROSEC project to exemplify societal differentiation. This section presents a summary of the discussion surrounding 11 such concepts: 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.

Although considerable variation can be observed in the way these concepts are socially constructed within the EU, in many instances more marked differences were found between the member and applicant states represented in the project. The focus in this section is, therefore, on the comparison between these two groups of countries. The illustrative materials are drawn particularly from the three candidate countries since a large number of examples from the EU member states were provided in the fifth series of *Cross-National Research Papers*.

Biological ageing

In analysis of the policy issues associated with demographic change, emphasis is often on the consequences of population ageing and its impact on the dependency ratio, that is on the balance between the population of working age and the younger and older dependent population. If the dependency ratio is weighted more heavily towards the older age groups, the demand for social services and health care is expected to increase, particularly in a situation where the generations of working age represent a declining proportion of the population (see the discussion of relevant indicators in Section 3 of the present issue of papers).

However, the phenomenon of population ageing may not present insurmountable problems if ways can be found of supplementing the labour supply, or if biological ageing is slowing down due to medical advances and

improved living conditions. As a result of the increase in life expectancy, the population aged 60 or 65 and over in EU members and applicant states is able to enjoy a larger number of years of good health following retirement and, therefore, a better quality of life than was the case 50 years previously. In the mid-1990s, it was estimated that, on average, women could expect to live to the age of 74 years without any severe disability and men to the age of 69 (Eurostat/European Commission, 2000, p. 38).

The age at which biological deterioration becomes problematic because of the caring needs it entails has been postponed and is, in theory, of shorter duration. In practice, however, medical advances and the provision of a higher level of medical and social care may mean that life can sometimes be artificially sustained for a longer period of time. This situation gives rise to a number of ethical questions, including healthcare priorities and euthanasia, that many of the countries in the IPROSEC project had not yet begun to address in any depth by the millennium.

At the turn of the twenty-first century, Estonia, Hungary and Poland were at a different stage of socio-demographic development from the EU member states in the project with regard to the ageing process. Throughout the 1990s, life expectancy in the three candidate countries remained consistently five or more percentage points below the EU average, with particularly low figures being reached for men in Estonia. In the early 1990s, life expectancy had decreased for both men and women and, by the late 1990s, it was still ten percentage points below the EU average for men (64.4, compared to 74.6). Under the Soviet Union, retirement age had been set at 55 for women and 60 for men, thereby compensating to some extent for low life expectancy as far as the age dependency ratio was concerned (Kutsar).

By the late 1990s, while life expectancy in the three applicant states was increasing, retirement age was gradually being raised, although it had not reached the same level as in most of the EU member states. A larger proportion of the population was, therefore, entitled to draw a pension for a longer period of time. The strain on the national budget was being felt to a greater extent in Poland, because life expectancy was growing at a faster rate than in the other two applicant states (Warzywoda-Kruszyńska).

Low life expectancy also meant that the age at which biological deterioration was considered to become a problem for society had not been postponed to the same degree. The issue of how to care for older dependants was, however, seen as less of a problem for policy development than in EU countries, as it was considered to be a question for families to resolve on their own rather than for the state.

Lifelong learning

Within the EU, one of the effects of greater life expectancy, better financial security among older people and the improved quality of life during retirement – adding life to years – has been the growth of opportunities for what has been termed lifelong learning. The concept was brought to public attention in 1996, when the European Parliament announced the European Year of Lifelong Learning. In a context where the speed of technological change is such that new knowledge has to be acquired to remain abreast with developments and

for society to innovate and adapt, learning is seen not only as the key to employability but also to social integration (COM(95) 590 final).

The term has been adopted in EU member states and, in some cases institutionalized, as for example in Germany where the Ministry for Education and Research established a unit with responsibility for lifelong learning. The emphasis has usually been on the training and retraining of the population of working age with a view to enhancing their employability. Indeed, when, in 2000, the Swedish Ministry for Industry, Employment and Communication was examining a proposal for all employees to be allowed a certain amount of time off from work every month to undertake education and training, employers expressed concern that they would not be given enough power to influence the type of training being pursued (Jönsson).

Examples can be found of cases where the learning experience is specifically intended for personal development. France has long operated a university of the third age, and open universities, such as that in the United Kingdom, provide opportunities for people of all ages to obtain academic qualifications without them necessarily being related to job opportunities.

The term 'lifelong learning' takes on a special meaning in transition countries, not least because remaining abreast of developments implies that they must first catch up with more westernized countries. In addition, the speed with which developments are occurring in transition countries requires people to renew and extend their skills to keep pace with the progress being made elsewhere. This said, Hungary and Poland are only just beginning to take the concept on board. By contrast, for Estonia lifelong learning was a crucial factor in the progress made during the 1990s. A Union for Open Education was, for example, established in 1991 as a grass roots organization for lifelong learning.

Since transition, however, in Estonia the responsibility for lifelong learning has shifted from the workplace to the individual, and from being a free service to one that often requires payment. Although training and retraining programmes continue to be provided by employees for firms undergoing restructuring, many people are taking the initiative themselves and paying for their own training with a view to enhancing their opportunities for employment.

Parenting skills

As governments have sought ways of responding to family change, and particularly to the consequences of family breakdown and the development of alternative living arrangements, attention is being paid increasingly to the obligations of parents towards dependent children and to the legal enforcement of their responsibilities (see Section 4 in the present volume). Not only have governments put in place legislation to ensure that absent parents provide maintenance for their children, but they have also begun to address issues about the ability of parents to care for their own children.

Parenting classes are seen in some countries as an appropriate form of action to help parents acquire the skills needed to become good parents. The acquisition of parenting skills would not appear to be conceptualized as part of the process of lifelong learning described above, but it could be seen as making an important contribution to social integration. The implication is that, if parents are supported in preparing for their family roles, they will carry out their

commitments to their children more effectively, thus reducing the burden on society.

In several of the IPROSEC countries, basic parenting skills are taught in schools. In Sweden, for instance, all pupils in secondary schools are taught subjects concerned with children and household life (Jönsson). Britain is an example of a country where, despite the hostility to intervention by the state in the private domain, governments have become active participants in the debate about the legitimacy of parenting skills in the school curriculum. In 1999, a MORI poll for the National Family and Parenting Institute found significant support for teaching about parenting in schools and some support (33% of the sample) for parenting classes for new parents. The Labour government under Tony Blair was reluctant, however, to appear to be too involved in the debate since it wanted to avoid being criticized as a 'nanny state' (Such).

Although the legitimacy of state involvement in the provision of parenting skills was not giving rise to much public debate in the applicant states, all three East European countries in the project had in place arrangements to help parents prepare for family life. In Poland, for example, provision is made for tuition in parenting skills by non-governmental organizations (NGOs), and especially by the Catholic Church, for couples intending to marry in church. An optional subject is offered in schools on 'Preparation for family life', but provision depends on whether the school has a specialist to teach the subject and whether students opt to take it. Parenting classes are, however, mandatory when preparing for adoption in Poland (Warzywoda-Kruszyńska).

The initiative has been taken in Estonia to provide instruction in family skills. Originally, the aim was to help mothers prepare for child birth and the care of new babies, but the target shifted towards preparing both the mother and father together for parenthood. Fathers are encouraged to be present at child birth to help and support their wives, and the emphasis on shared parenting continues after the birth, when provision is made for the mother and father to stay at the maternity clinic with the child in a family room. Because it is not covered by health insurance, however, take-up is limited. Measures introduced during the 1990s to help parents acquire parenting skills were not universally implemented. They were generally targeted at parents considered to have poorly developed parenting skills, such as young mothers. Progressively, in Estonia more emphasis has been placed on preventing early and unplanned pregnancies through sex education, which has been taken forward mainly by NGO programmes (Kutsar).

In Hungary, from 2001 new subjects covering parenting skills were being introduced in schools. These subjects include technology and lifestyle, society and ethics, social knowledge and hygiene. One of the main goals of the society and ethics classes in the seventh grade of elementary school for 13 year-old children is to prepare them for developing and maintaining interpersonal social relationships. Social knowledge classes are intended to help children, from the ninth grade, aged 15 and over, to find their place in society by providing them with practical life-strategy guidelines (Takács). Beyond school education, no parenting classes were provided in Hungary, however, to help parents acquire the skills needed to become good parents. Absent parents (mostly fathers) are required by law to provide financial support for their children (see Section 4 in this issue of papers), but little effort is made to help fathers remain good

parents. Where local educational advisory centres are involved with parenting matters, they confine their support to occasionally helping fathers to maintain contact with their children following divorce or separation (Neményi).

Intergenerational solidarity

As family structure has evolved, increasing attention has been paid to the effects of such change on relationships between the generations. The term 'intergenerational solidarity' has been used to describe the mutual support provided by parents and their children throughout the life of family members. It has been argued that the behaviour of people towards their parents and children involves a complex mix of notions of reciprocity, a moral sense of responsibility and legal obligations, which may change over time and in accordance with personal circumstances (Millar and Warman, 1996, p. 7). During the 1990s, intergenerational solidarity became a recurring theme in European Commission documents (for example COM(1999) 221 final) and has become an issue for some governments. Within the EU, ties between the generations would seem to be stronger in countries where family obligations are reinforced by the law (see Section 4 in this issue of papers). Studies of intergenerational transfers are beginning to show that informal arrangements for providing financial, material, physical and moral support are far more enduring than might have been supposed, and that caring, in particular, is still very much socially expected of women, as illustrated in the United Kingdom (McGlone *et al.*, 1999).

Intergenerational solidarity is a meaningful concept in the transition countries. Families have a strong moral responsibility towards family members and are under considerable social pressure to respond to the needs of parents and children. Although Estonian, Hungarian and Polish law defines intergenerational obligations, seldom do they become an issue for the law courts because the moral obligation to look after family members is so strong. In Estonia, however, it has been suggested that the moral obligation towards family members, particularly when this extends to sharing a home with several generations of the same family, has a negative impact on family life. Multigenerational households, which were a necessity when housing was in short supply, are considered an intrusion on personal space and a factor contributing to the low fertility rate. They are also believed to run counter to the basic values of Estonians in terms of the nuclear family. As the housing market has begun to develop, albeit slowly, more young families have moved out of the family home to regain their nuclear family household status (Kutsar).

Welfare dependency

In countries where the legitimacy of state intervention in family life is accepted and where access to social protection benefits and services is regarded as a citizenship right, dependency on welfare is not considered to be a meaningful concept.

In the United Kingdom, the term welfare dependency has become politically loaded and has been used in a derogatory sense in the British context to refer to individuals who become reliant on state benefits for their income. The implication is that they are unable to earn a living for themselves

and their families and have not earned the right to benefits by paying taxes and social insurance contributions. Nor have they accumulated sufficient savings to be able to cover their living expenses without support from the state. Policies intended to move people off benefits and into work have focused on incentives to develop a system that supports work by ensuring individuals and their families are better off when working than out of work. The concept of employability, introduced at EU level in the 1998 employment guidelines for member states, also advocated measures to smooth the transition into work and the return to work for the working age population, whatever the reasons for their non-participation in the labour force.

In the transition countries the concept of welfare dependency has been the subject of debate. In Hungary, dependency on benefits is seen as a problem, but mainly with reference to the Roma (Gypsy) population, since low levels of education and professional skills and large families are factors contributing to high levels of unemployment (in some regions as high as 85%) (see Kende in the second issue in this series). Because of the association between welfare dependency and the Roma population, the expression is also used in a derogatory sense, as in the United Kingdom. The government and other policy actors have responded, in rhetoric but not in practice, by stressing the need to move people off welfare dependency and into work. Despite several studies since the 1970s on the plight of the Roma and their dependency on welfare, the government has failed to take any practical measures to ease the problems (Neményi).

In Estonia, in the initial stage of transition, policy actors faced a dilemma: whether to support individuals who were economically dependent on the state or those who were contributing to economic growth. The political choice was made to encourage economic development and support entrepreneurship. Initially, population groups who were not part of the economic mainstream expected to receive help from the state as in the past: they had 'learned how to be helpless'. In effect, dependency on the state for welfare has not become a major problem because it was not a viable option for those on low incomes. The very low level of unemployment benefit – 28.5% of the already low minimum wage since 1996 – made it impossible to survive on welfare (Kutsar, 1997).

In Poland, the benefits provided by the social protection system are also very low. They, therefore, serve to ensure little more than bare subsistence for families. The legal regulations governing benefits clearly state that families have responsibility themselves for making an effort to improve their situation. Those who remain on benefits for a prolonged period of time fall into a 'passivity trap', leading to permanent exclusion from the labour force. The poorly qualified, who are unable to command a good salary, are particularly prone to falling into this trap (Warzywoda-Kruszyńska).

Informal economy

The informal sector of the economy is generally defined as activities and productive work that are hidden from, or ignored by, the state for tax or social security purposes. It covers both paid and unpaid work, including domestic or voluntary work (Windebank and Williams, 1994, p. 44). The term 'undeclared work' is taken to mean any paid activities that are lawful in nature but are not

declared to public authorities. It would, therefore, exclude any work that does not have to be declared (COM(1998) 219 final).

In some countries (Germany, the United Kingdom, Estonia and Poland), paid work that is declared (and is legal) may not be subject to taxation or social security payments because it falls below the earnings limit. Informal/undeclared work is generally believed to be on the increase due to the growing demand for personalized services, the growth of subcontracting and the increase in the number of activities that have been created by new technologies.

Undeclared work is viewed differently from one country to another. In cases where the population accepts the need for a high level of taxation as a means of funding universal provision of social services, undeclared work is considered to run counter to the common good and to undermine social solidarity, as in the Nordic states. Where individuals gain rights to social protection through their own social security contributions, as in France or Germany, undeclared work presents less of a threat for the protected population, since undeclared workers do not have access to the same rights. It does, however, create a marginalized population. Where the tradition is for families to have prime responsibility for supporting their own members, informal work provides a flexible means of supplementing family income and of avoiding collective responsibility, as in the Mediterranean countries. For example, in Greece the informal sector is estimated conservatively at 30 to 35% of GDP (Baldwin-Edwards and Safilios-Rothschild, 2000, p. 207). In all three candidate countries, illegal activities have increased because of the instability and uncertainty of the transitional period. In Hungary, for example, the informal economy is estimated to account for one third of GDP. High taxation and low incomes have encouraged the growth of family firms, which provide additional financial resources while avoiding the burden of taxation (Neményi).

One positive side-effect of the increasing number of underground activities in the candidate countries during the transition period has been the emergence of a large number of new entrepreneurs, as in Estonia. In the early stages of societal transition, cottage industries were established, and illegal income and labour were concealed. As firms grew stronger, they began to legalize their activities in the interests of creating and preserving their reputation. However, several of the measures implemented by the state, such as taxes on profits and the introduction of employers' social insurance contributions, forced small businessmen to continue concealing their income.

The existence of an informal economy, extending to all forms of untaxed income, also means that economic problems may be less serious than would appear from official data (United Nations Development Programme, 1995). On the negative side, however, because of the uncertainty that it creates and the instability of the market that ensues, the informal economy prolongs the process of transition for these countries and is not, therefore, universally supported. In Estonia, for example, liberal economic policies have been introduced in an attempt to reduce the grey sector of the economy (Kutsar).

Labour market concentration and segregation

Another aspect of dependency is associated with the structure of the labour market. The term 'concentration' is generally used to refer to the share of the total female labour force employed in an occupation or group of occupations.

Labour market 'segregation' refers to the sex composition of an occupation and the extent to which it is female or male dominated. Studies of labour market concentration and segregation, for example in the EU member states, are often used to demonstrate that women cluster, or are over-represented, in occupations that are low paid and low status and where security of employment is poor, despite the fact that, in many EU member states, more women than men are obtaining qualifications in higher education. Men and women thus tend to be employed in different occupations, associated with different expectations and rewards, raising questions about equality of opportunity (Rubery *et al.*, 1999).

In general, the transition countries follow a similar pattern to the EU member states, though they have made considerable advances in occupations requiring a high level of educational qualifications. For example, while women are over-represented in lower paid and lower status jobs in Estonia, they are also over-represented in specialist jobs requiring a high level of education, such as the medical profession. For example, 78% of general practitioners are women, though few women reach the most senior ranks. As in most other EU member states, Estonian men continue to occupy the majority of the highest and most powerful positions in society, for instance as members of parliament and in the banking sector, but they are also more likely to be over-represented among unskilled workers (Ministry of Social Affairs, personal communication) (Kutsar).

As in many other EU member states, the number of women in higher education in Hungary is greater than the number of men. Women are more likely than men to study academic subjects. When they do take vocational courses, particularly those that prepare them for traditionally low-prestige and low-paid jobs such as teaching and nursing, the segregation of the labour market is perpetuated (Neményi). Similarly, a relatively high level of education does not protect women from unemployment in Poland. Nor does it prevent them from underachieving professionally in comparison with men (Warzywoda-Kruszyńska).

Reconciliation of paid and unpaid work

The informal economy is often a matter raised in the debate over the relationship between paid work outside the home and unpaid work within the home. In the Nordic member states and in France, the reconciliation of paid and unpaid work became an issue for governments as early as the 1960s. Although it moved onto the agenda of the European Commission in the 1970s, agreement was not reached until the 1990s over specific measures to assist couples to combine paid and unpaid work (Hantrais, 2000b). In some countries, strategies for reconciling the two areas of activity are seen primarily as a matter for families themselves, resulting in a variety of different arrangements, some of which involve women adopting flexible worktime patterns. In others, the state has intervened actively to assist parents by making available good quality, low-cost childcare facilities, by introducing parental leave and by insisting that part of the leave is taken by the father, as in Sweden. These variations depend to a large extent on the legitimacy accorded by different societies to state intervention in family life (see Section 4 in this issue of papers) and to the social and economic acceptance of the place of women in the labour market.

In the post-Soviet states, including the former German Democratic Republic, the situation is different from that in most EU member states. Under the Communist system, both women and men were employed on a full-time basis, and the distinction between the sexes was not made in the same terms as in Western European countries. Parents were assisted with caring for children by the provision of cheap pre-school day-care institutions, and paid maternity leave that enabled mothers to stay at home with their children when they were very young (Lohkamp-Himmighofen and Dienel, 2000).

In the societies of Eastern Europe, where women's economic activity rates were very high until the transition, the right to choose between paid work and childcare became an issue of self-expression and identity in the 1990s, whereas previously women had had no choice: everybody was expected to work. Since transition, changes have taken place in the way in which the reconciliation of paid and unpaid work is socially constructed. The withdrawal of the state from these areas has coincided with the changing role of women in society. Reconciling paid and unpaid work has become a private concern to be resolved within the family. While EU member states have been developing policies to help parents combine employment with family life, in the three candidate countries in the IPROSEC project, the political, economic and cultural opportunities for reconciling paid and unpaid work have been diminishing. The reduction in social spending and the growth in unemployment have led to job insecurity. As a result, parents, particularly fathers, are unlikely to take leave for family reasons. The worsening problem of unemployment also places less pressure on employers to arrange flexible working times to suit women employees.

In Estonia, at first transition brought about greater variation in pre-school provision, but it also gave more women the opportunity to stay at home if they wished. The status assigned to unpaid work in the home was high, especially since it represented a form of emancipation and promoted the traditional role of women as mothers that had long been lost under Soviet rule. Immediately after transition, Estonian women exercised their preference to stay at home or work part time, but data for 1998 suggest that the proportion of women hoping to stay out of the labour force had decreased significantly. Only 20% preferred to stay at home, and these were generally women from households with above-average levels of income (Hansson, 1999). The reality for many women in Estonia has been economic hardship and the need to return to work for financial reasons. Kindergarten places are no longer provided free of charge. The private market for childcare and domestic services is, progressively, replacing public provision and unpaid work in the home. While creating low-paid jobs, private provision of childcare is also making access difficult for low-income families. In addition, the increasing incidence of divorce means women are being forced back to work not only to support dependants, but also to ensure that they accumulate sufficient years of paid work to be guaranteed an adequate state pension (Kutsar).

The historical context in Hungary brought different changes for women compared with other applicant states. The main reason was that, while women's economic activity rates were statistically high under socialism, the figure also included the number of women staying at home with small children ('inactive employees'). The goal was to reconcile paid work and motherhood, and the introduction of a childcare allowance in 1967, which was viewed as

income for mothers looking after children, added weight to the concept of women's economic activity in the home. Although paid leave is available to fathers to enable either parent to stay at home with their children until the age of three, they seldom take advantage of the possibility.

Transition in Poland did not usher in marked changes for women. The low standard of living, low wages of both men and women, high unemployment rates and shortage of jobs meant that the right to choose between paid work and childcare was not so much an issue of self-expression and identity, but rather an ideological choice that had no real substance. Women were forced to work through financial necessity. Although paid parental leave can be taken by either the father or the mother, the choice is exercised only in the case of low-income families. Women are continuing to bear the main burden for reconciling employment with family life (Warzywoda-Kruszyńska).

Distribution of household labour

In societies where large numbers of women have entered and remained in the labour market, particularly on a full-time basis, questions are raised about the distribution of household tasks. In situations where the male spouse has been the main breadwinner, it has been customary for the woman to carry out most of the unpaid work in the home. When women work part time, they generally continue to bear the main responsibility for housework and childcare, and they are also more likely than men to care for ageing relatives. When women work full time, studies across EU member states have shown that household tasks are not shared equally (reviewed in the first issue of the fifth series of *Cross-national Research Papers*, pp. 47–8). It is still not unusual for women to do less overtime than men, and they continue to interrupt their occupational careers when they have young children. The distribution of household labour is, therefore, a source of role differentiation within families, with the tasks carried out by women generally being considered to be of lower status than those undertaken by their male partners.

In the applicant states, the high levels of female economic activity did not result in more equal sharing of household tasks. As suggested above few men take leave to stay at home and look after their children. Social surveys from all three applicant states have shown that, whether or not she is working, the woman is still the main provider of housework, and of child and elder care.

In Estonia, the distribution of domestic tasks is more equal if the couple do not have dependent children or if the children have left home. A similar pattern is emerging among couples in the younger generation who have children and also among those with higher levels of education (Kutsar).

In Hungary, the traditional cultural bias against buying in services to replace the work previously done by women in the home is curbing the growth of domestic services. Work in the home, particularly motherhood, is attributed the same value and status as paid employment. Thus, while the distribution of household labour perpetuates traditional gender divisions between men and women, the status ascribed to the homemaker role is closer to that of paid work outside the home than in other parts of the EU (Neményi).

In Poland, the responsibility for providing services such as nurseries and kindergartens rests with local government. Because they are not made available free of charge, access differs depending on income. As a result,

lower income families are tending to take on more domestic services for themselves, and women have even less time to pursue their own interests or to be with their families (Dabrowska, 1997). The male breadwinner model of family life prevails. Married women are found to devote twice as much time to household work as their husbands. If men do participate in household tasks, their contribution is confined to childcare, which has been interpreted as a positive change in their roles within the family (Firlit-Fesnak, 1997).

Individualization of social protection rights

The individualization of social protection rights has become an equality issue. In social protection systems based on the male breadwinner concept, married women used to make lower social security payments than men on the grounds that the contributions paid by their spouses, as the primary breadwinner, covered all family members. As a consequence, however, women did not receive benefits in the own right. Instead, they were provided with derived rights, which they subsequently lost in the case of marital breakdown, as for example with pensions. By enabling women to pay their own social security contributions and taxation, they become eligible to receive benefits to compensate for loss of earnings due to sickness or unemployment, and they contribute to their own pension rights. However, it is widely recognized that individualized rights may not necessarily be to the advantage of women, since their earnings are often lower than those of men given that female employment is concentrated in low-paid jobs, as indicated above. It is also not uncommon for a widow's pension to be greater than a pension based on a woman's own earnings.

The concept of individualization of social rights is constructed differently in transition countries since women were already making a substantial contribution to their own old-age pension rights due to their traditionally high economic activity rates. In addition, while gaining individual rights of access to social security may be seen as an advantage and an equality issue for women in Western European countries, the prevailing economic climate in Estonia, Hungary and Poland means that individualized social rights are likely to be disadvantageous for many women. In Estonia, female life expectancy exceeds that of men by more than ten years, but the income earned by women for the same amount and type of work is less than that for men. As a result, women's pensions are lower, thereby creating a greater risk of poverty in old age (Kutsar).

The situation in both Hungary and Poland is similar, but here the concern about the future survival of women is greater still because of the shortage of jobs due to economic and social restructuring. Following transition, the employment rate for women in Hungary fell due to privatization and the opportunities created for women in the informal economy, and also because of the emergence of small, family based enterprises where women worked for a minimal income. Since they are paying a low level of social contributions during their working life, women receive smaller pensions. Poverty in old age under a system of individualized social security rights is, therefore, a growing social problem that future governments will need to address.

Comparing EU member and applicant states

Reports from the European Commission on the social and demographic situation and on social protection in Europe, together with the social policy documents emanating from Brussels, have accustomed social scientists, policy actors and, through the media, the wider public to many of the concepts discussed in this paper. They are sometimes less familiar to researchers and policy actors in the applicant states.

The contributions assembled in the paper demonstrate that, even if the concepts selected are meaningful, the way they are socially constructed in the candidate countries may differ from that in EU member states. Variations can also be found over time between EU member states and between the three candidate countries, although the former are not a strong focus of attention in the present publication. In addition, the information presented in this overview illustrates the point made in introductory section to this volume of papers that the policy issues raised by socio-demographic change will not necessarily have the same impact from one country to another.

The analysis of the concept of biological ageing is, for example, less salient in societies where life expectancy after the age of retirement is low, as was the case throughout the 1990s in the applicant states. The concept of lifelong learning has also been shown to assume a different meaning in a context where the acquisition of new skills is seen as a crucial component in economic development. The diverging views over who should be held responsible for encouraging good parenting is not peculiar to the applicant states. Public debate in both Estonia and the United Kingdom would seem to be stimulated by the need to avoid teenage pregnancies as well as by concern about the social problems created by family breakdown, which has become increasingly prevalent across the EU.

The transition countries provide interesting examples of societies where the moral obligations between generations are strong, but where, as in the case of Estonia, strong reliance on family support is beginning to be questioned. Although the concept of dependence on welfare is meaningful in the applicant states, it has different connotations from one country to another. It is associated with the Gypsy problem in Hungary, but in Estonia and Poland, where benefit levels are low and labour markets are tight, little incentive can be found to encourage recipients of welfare to stay on benefits as an alternative to work.

An alternative to welfare, which is more widespread in the Mediterranean EU member states and in the candidate countries, is to resort to undeclared work, often in the context of a family firm. The transition countries have relied heavily on the informal economy, and it has afforded an important source of income for families during a period of economic upheaval. Governments are, however, beginning to reign in on undeclared work in an effort to establish more stable economic growth and to provide funding for social protection.

Across the EU member and applicant states, gender issues are a focus of policy interest, but they tend to take on a different meaning in the transition countries. Everywhere, evidence can be found of continuing labour market concentration and segregation, despite the achievements of women in the educational system, but transition has brought dramatic changes in the labour market opportunities for women.

Whereas women in EU member states are increasingly entering and remaining in employment, and governments are putting in place measures to assist couples in reconciling paid work outside the home with raising a family, the applicant states moved away from a situation where women were forced to pursue full-time jobs and to avail themselves of publicly provided childcare services. Transition meant, in the early years, that women were, for the first time, given the choice of whether to stay at home and look after their own children or go out to work. However, their choice was soon to be restricted due to financial necessity: they needed the income from work to make ends meet. Problems of finding suitably paid jobs and the introduction of charges for childcare and other domestic services made the choice into a dilemma for many couples. As a result, in the post-Soviet era women can be seen as the greatest losers. To a large extent, their situation has been exacerbated by the fact that the traditional distribution of household labour has been perpetuated, if not reinforced. The advent of individualized social protection rights under the impetus of the EU is also conceptualized differently in the applicant states, since women were in the past contributing to their own pensions. Due to their full-time uninterrupted employment patterns, they accrued rights that they are now becoming unable to exercise in a context where they are having difficulty in maintaining their employment status.

3. Measuring Family Change

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. In this section, the definitions of some of the more problematic indicators used in the IPROSEC project are examined. Issues of measurement and comparability are discussed, with reference to data availability and consistency over time (within countries) and space (between countries). Of particular interest is the question of comparability of data between European Union member and applicant states. The indicators selected for analysis are grouped around the topics that are 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.

Defining family and household structure

Considerable attention has been devoted to finding internationally acceptable definitions of families and households for data collection purposes. The definitions recommended by the United Nations have been widely applied in national population censuses. Progressively, they have been adapted to take account of changes in the social acceptability of developing family forms.

FAMILY NUCLEUS

The family nucleus, according to the United Nations is composed of persons living as husband and wife 'within a private or institutional household, or as parent and never-married child by blood or adoption of the family unit'. Consensual unions have been recognized in statistics, as have reconstituted families. Some confusion remains, however, concerning the distinction between a family and a household. In international studies, the family unit is taken to be a subcategory of a household and may, in some cases, be equivalent to a household (United Nations Statistical Commission, 1987, p. 35). In Italy, for example, a unit is considered as a household only if the people living in it are related by blood or marriage, which in effect equates households with families (Del Re).

An important source of discrepancy between countries results from whether or not age is taken into account in defining the relationship between parents and children. As shown below, it cannot be assumed that young people cease to be dependent on their parents when they reach a particular age. Indeed, few children acquire economic independence in their teens. For indicators such as lone parenthood, it is, however, misleading to classify all children living alone with one of their parents, irrespective of age, as lone-parent families. Eurostat generally considers 'dependent' children to be those aged under 25 living in a household in which at least one of their parents is a member, irrespective of whether the parent is economically active or unemployed, but this definition is not consistently applied. Jonathan Bradshaw *et al.* (1996) have defined lone-parent families as a parent living alone, or in another household, with a child aged under 18, but the data provided by some national informants in their study included only children under the age of 15, as

in the case of Ireland, while children of any age were counted in Germany. In addition, any adjustments to age categories automatically change the extent of the phenomenon being measured. For example, France applied an age limit of 25 until 1982, but it was abolished for the 1991 census. The effect was to increase the proportion of lone-parent families and to decrease the number of individuals living in single-person households (Pennec).

As shown in the Section 4 in this issue of papers, different rights are attached to different ages for children, and statistics are needed that allow politicians and administrators to calculate the number of individuals in a given category who will be affected by a specific policy measure. Although the age of majority has been reduced to 18, the age of consent, for example, is often lower, and child benefits are frequently extended for children who are remaining in education to a later age. The problems associated with using age as a defining characteristic of childhood are encapsulated in Estonian practices. The criticisms levelled in Estonia about the lack of a common reference age for determining the boundaries of childhood could well be applied elsewhere. The United Nations' Convention on the Rights of the Child, which Estonia signed in 1991, is used to identify a child as a person under 18 years of age. The Child Protection Act passed in 1992 by the Estonian Supreme Council observed the same age limit. In the Family Law, revised and passed in 1994, 18 years is the legal age of majority. However, child benefit is paid until the child is 18 or until 19 if s/he continues in education. The mandatory age for compulsory schooling is 17 years, and working age starts at 15. Ambiguity in language is a further complication identified in Estonia. An issue raised when drafting legislation is whether 'up to the age of' is inclusive or exclusive of the age indicated (see State Family Subsidies Act and Child Protection Act). The problem has been brought to the attention of the Governmental Committee on Legal Terminology and referred to the Institute of the Estonian Language (Harajou, 2000).

HOUSEHOLDS

Although policy documents more often speak of families than of households, in cross-national comparisons households prove complicated to measure because two different definitions are in operation in national censuses and surveys. Most EU member states refer to the 'housekeeping unit', which implies joint provision of food and other essentials, and possibly pooling of income among individuals who are not necessarily related. France and Sweden use the concept of the 'household dwelling', based on the main place of residence, which does not yield information about separate housekeeping units within a household. In Estonia, a household is defined as a group of people living at the same address, sharing joint monetary resources and whose members consider themselves to belong to the same household (Statistical Office of Estonia, 2000) (Kutsar).

The structure of households as recorded in statistics may also be affected by differences in the role attributed to the head of household, or reference person, and in the way such a person is designated (Lefranc, 1994). In Italy and Spain, the members of the household identify the reference person. In Germany and the United Kingdom, the respondent entered on the first line of the survey form is designated as the reference person. In France, the reference person is determined by using a set of rules that give precedence to sex

(male), occupational status (working) and age (oldest), in that order (Pennec). The implication is often that the concept is gendered, since the reference person is generally the male partner. Its use may be particularly prone to bias if the head of household is required to answer questions on behalf of other family members (Threlfall).

Another problem in measuring both family units and households in censuses results from differences in the way that individuals are counted: either as legally resident in a particular dwelling on the census date or as being present when the survey is conducted. Most countries base their census data on residence, irrespective of where people are at the time of the survey, but Ireland and Greece adopted the pragmatic solution of counting as a household everyone present in a dwelling on the census date (Eurostat, 1995, p. 3). In the first case, problems arise if individuals are living in more than one dwelling. In Germany, for example, people with more than one place of residence for professional reasons are counted twice, thereby inflating the number of single-person households. Similarly, in Estonia, where the requirement to register the place of residence was removed several years ago, the Civil Census 2000 revealed that some people, including single-person households, may be recorded twice or not at all (Kutsar).

MULTIGENERATIONAL HOUSEHOLD

The term 'multigenerational household' is used to refer to situations where several generations of a family (that is not only parents and their children of whatever age) live together under the same roof and/or have common housekeeping arrangements. Most censuses, and also the European Community Household Panel (ECHP) survey, identify the number of families within a household and the relationship between each individual and the head of household. Information collected in different types of survey does not, however, produce consistent results for this indicator. In Estonia, for example, a marked contrast is found between census and household panel data. The relationship between household members is difficult to identify in the census data collected by the Statistical Office, since generations are defined by age rather than by the relationship between members of the household. The head of a household is defined as a member of the household with the largest long-term contribution to the household income. Adults (of working age and over retirement age) and children are distinguished as three separate categories. When representatives of all three categories are found within a single household (a 14 year-old child, a mother of working age and a father who has reached retirement age), they will automatically appear as a multigenerational household, when they are in fact all members of the same family unit. By contrast, the Estonian Household Income and Expenditure Survey, which has been the main source of information concerning household composition since 1993, identifies the number of families within a household and the relationship between each individual and the head of household (Kutsar).

LONE PARENTHOOD

Although the United Nation's definition takes account of changes in family structure, many of the problems in collating data that have been collected at national level have not been resolved. For example, even though a common

definition can be agreed for lone parenthood, discrepancies are likely to occur cross-nationally, in addition to those concerned with age, already mentioned above (Roll, 1992; Bradshaw *et al.*, 1996). Lone-parent families may originate from a variety of processes, though most lone-parent situations are today generated by the breakdown of consensual and marital unions. This means that quite different phenomena are being recorded and may not be properly captured by aggregate statistics, particularly when the lone-parent concept is not applied at the data collection point but post-survey for the construction of tables and classifications. ECHP values are consistently lower than those recorded in censuses, most probably due to differences in the way lone parenthood has been defined and identified, and to sampling bias, but it is also likely that lone parents may be under-represented in panel surveys as compared to censuses.

Further problems arise if the lone parent is not heading his or her own household. The United Nations' definition of private households explicitly refers to the fact that a never-married woman or man living with her/his own never-married child (ren) in her/his parents' home is to be identified as a family unit. Related issues have to be dealt with when a child spends equal time with each parent, and when one or both of the parents 'repartner'. In these cases, the available nomenclature may not adequately reflect the range of possible configurations.

RECONSTITUTED FAMILIES

Like lone parenthood, consensual and reconstituted family units pose measurement problems that are far from having been resolved within the European context, despite the attempts by the United Nations to clarify definitions to be used in national censuses. In 1987, the United Nations Statistical Commission (1987, p. 35, § 132) went so far as to recommend that separate counts should be given of consensual unions and legally married couples. Children were to include step-children as well as adopted children but not foster children, although it did not specify whether they should be counted separately or linked to their biological parents.

The concept of the reconstituted family is generally used to refer to couples (either legally married or not), where at least one of the partners has been involved in a previous union. Again the general definition covers a wide variety of situations related to the former and current marital status of the partners involved, dependent on whether one or both parents bring children from a previous union and whether common children are present (van Solinge and Wood, 1997).

The ability to identify reconstituted families and their specific forms depends on the availability and quality of information on marital and union history, on children (of parents) in unions, and the ability to attach children correctly to their parent(s). In several instances, no instruments are available to carry out this process unless the new couple marry. In Hungary, for example, because of the way census and microcensus data are collected, the term 'reconstituted family' can refer only to a couple that have remarried. As cohabitants cannot register officially, unmarried couples with children cannot be considered as a reconstituted family. Information about unmarried,

reconstituted family units can only be drawn from special cross-sectional surveys (Neményi).

Because of problems over data collection, reliable and comparable data on reconstituted families continue to be available for very few of the EU member states. An added complication arises from national differences in the legal status of step-parents (see Section 4 in this issue of papers). Although the picture they provide about family constitution is limited, data on marriage and remarriage and the number of children in families with other than two biological parents can be informative about trends over time within a given country. In Sweden, for example, whereas relatively few children are born into families without two parents, according to the Swedish Statistical Office, by the age of 17 only 65% of children are living with both their biological parents. About 7% of families were recorded as being reconstituted in the mid-1990s (Jönsson). In 1999 in Estonia a point had been reached at which almost one third of men and women were known to be contracting a second marriage, and only two-thirds of all marriages taking place were first marriages (Kutsar).

Measuring fertility rates

In a context where changing family forms are difficult to measure and where falling fertility rates are being interpreted as a sign of population decline and ageing (see below), policy actors are concerned to have an accurate record of family building behaviour. Among the different measures of fertility, completed fertility rates by generation are considered by demographers to provide the most reliable indicator of trends in reproductive behaviour, since other measures, such as crude annual birth rates and total fertility, are influenced by the effects of the timing of births.

CRUDE ANNUAL BIRTH RATES

The crude annual birth rate is the most straightforward indicator of fertility, since it measures the frequency of births in a given year. This indicator is influenced not only by the timing of births but also by the structure of the population. For example, a country with a young age profile (more women of reproductive age) will have more births in a year than an older population, even if the completed fertility rate of both populations is the same (Pennec).

Although the crude birth rate would appear to be relatively easy to measure and record, Estonia provides an example of how changes in the definitions used can affect the comparability of results over time. Before 1992, a birth was registered if the new born child's weight was at least one kg. and the baby was at least 35 cm. in height. The pregnancy had to have lasted at least 28 weeks, and the child had to survive for at least one week. From 1992, the Eurostat definition for calculating births was adopted: the child has to be at least 500 gm. in weight, delivered after 22 weeks of pregnancy; and it must be breathing or showing other signs of life. This means that some of the births recorded during the 1990s would not have been registered a decade earlier.

TOTAL PERIOD FERTILITY RATES

A fairly detailed account of the situation for a well-defined population group is provided by the fertility rate by age, which relates the number of births to

women of a given age to the number of women in that age category. Total period fertility is used to refer to synthetic cohorts at a particular point in time rather than being calculated from the actual cohorts concerned. It calculates the average number of children who would have been produced by a cohort of women whose reproductive behaviour throughout their childbearing years is estimated from the sum of fertility rates by age for women of different ages over the period considered. The indicator is, therefore, subject to correction if the actual behaviour of a given cohort departs from what has been predicted. It provides a good indication of fertility if reproductive behaviour is stable, but is less reliable if behaviour suddenly changes.

If every woman has two children, the first at the age of 20 and the second ten years later, for the purposes of calculating the total period fertility rate, it is assumed that every woman in a given age cohort behaves in the same way as the women currently in that cohort, even though the women in question were actually born ten years before those whose first birth is being recorded. If, in 1980 for example, the prevailing circumstances meant that all women in the 20 year-old cohort decided to delay their first birth by one year, no births would be registered in that year for women aged 20 having their first child. In the following year, if conditions returned to normal, total period fertility rates would record births to women aged 20 and to those women aged 21 who had postponed their first birth, as well as to women aged 30 with a second child.

The result would be that women in this cohort would be calculated as having three children each, which would explain why, after the Second World War in EU member states, the indicator for total period fertility rose abruptly, as women compensated for delayed births at the same time as women born in the 1930s began having their children at an earlier age. There is, however, no reason to suppose that subsequent cohorts of women who decide to postpone motherhood will follow the same pattern. If births are delayed for too long, the 'right moment' may never come, and this will be reflected in completed fertility rates. Even though a constant fall in the number of births may be due to women continuing to postpone the age of motherhood, the population growth rate depends on fertility rates at a given point in time and not on completed fertility (Leridon, 1990).

COMPLETED FERTILITY RATES

Completed fertility measures the actual number of children produced by a given cohort of women, once they have come to the end of their childbearing years. If a fall in the total period fertility rate is not compensated for by a rise in the number of births at a later point in time, the overall effect is a lower completed fertility rate, which has been the case across the EU since the 1980s. Indicators for total period and completed fertility rates thus measure different phenomena, but both assume childbearing to begin at age 15 and to be completed at age 49.

Even though few births occur among women aged 40–49, the values for completed fertility rates estimated in the year 2000 for post-1950 cohorts may be inaccurate since they are based on the assumption that women in this age group will not have any more children. Only data for cohorts that have actually reached the end of their natural reproductive period can be used to provide an entirely accurate indication of trends. In tracking the impact of policies,

demographers therefore need to be able to distinguish between intensity and timing of births at a given point in time. Although women may be postponing the age of child birth, the available evidence does not suggest they are compensating by having larger numbers of children at a later age.

Population ageing and dependency

Population, or demographic, ageing can be defined as the combined impact of declining fertility rates and falling mortality rates. Declining fertility results in smaller numbers of young people in relation to total population. Falling mortality rates contribute to greater life expectancy, leading to larger numbers of older people in relation to total population. The overall effect of the two phenomena in combination is a rise in the median age, or the age separating the population into two groups of equal size. Population ageing is problematic for governments, primarily because, by changing the balance in the dependency ratio towards the older population, it imposes a heavier burden on the population of working age (see below) and the resources they generate. Demographers, therefore, engage in making predictions about shifts in the dependency ratio for politicians to use in formulating their policies.

Total dependency is calculated by the European Commission (1998a, p. 9) as the proportion of the population aged 0–19 and of 65 years and over divided by the population aged 20–64. The dependency ratio for older people is calculated as the proportion of the population aged 65 and over divided by the population aged 20–64 years. Similarly, the dependency ratio for younger people refers to the proportion of the population aged 0–19 divided by the population aged 20–64.

Using these age groupings, scrutiny of data for the 15 EU member states shows that total dependency fell in the period between 1975 and 1995 due to the presence of the baby-boom generations in the active population and the fall in fertility rates. However, total dependency is expected to increase after the year 2010 as the baby-boom generations reach the age of 65. Medium-term population predictions are thus giving rise to concern about the sustainability of social protection systems and their ability to meet the needs of increasing numbers of older dependants in a situation where the size of the population of working age is stable or declining.

The problem of population ageing may not be long term for EU member states. Although, the baby-boomers due to reach the age of 65 in the near future will temporarily increase the percentage of persons over 65, thereby accelerating the ageing of the population, the cohorts following the baby-boomers into old age will be smaller, thereby lowering the dependency ratio. Even though the total dependency ratio may be similar between countries when the European Commission's age groupings are applied, the weight of the different components varies from one country to another due to the intensity and duration of the postwar baby boom and factors contributing to high or low mortality rates. At the turn of the twenty-first century Ireland, for example, had one of the youngest populations in the EU due to its relatively high birth rate and relatively low life expectancy. Sweden had a relatively old population due to its high life expectancy and despite an above-average fertility rate (Hantrais, 1999b, figure 1).

In addition, dependency ratios vary across countries according to the actual age at which young people enter the labour market and leave the parental home, and at which older people exit from the labour market and become financially, physically and socially dependent on the sandwich generation (see below and also Section 4 in the present volume). Within-country variations in population ageing can also be identified due not only to the fall in fertility rates and the increase in life expectancy, but also because of internal migration. For example, in France and the United Kingdom, older people tend to migrate to the southern coastal areas in their own countries, resulting in higher old-age dependency ratios in these regions. North European retirees with generous occupational pensions are often attracted to the warmer climates of the Union's sun belt, with important implications for the provision of care and services.

Defining the population of working age

Many objections can be raised to definitions of population ageing and dependency based on fixed age groups, as argued above. The definition of the working population is especially problematic when its lower and upper limits are determined by age. The 15–64 age band used by Eurostat to define the category is widely considered to be no longer appropriate for the task in hand. In its 1995 demographic report, for example, the European Commission (1996a) took the population aged between 20 and 59 as the population of working age. In its 1997 report, the European Commission (1998a) used the age group 20–64 as more representative of the actual population of working age, though doubts could be expressed about setting the upper limit at 65 for the reasons given below. The International Labour Office (ILO) definition sets no upper age limit for seeking work or being employed. At national level, different age categories may be adopted to make a political point. In Estonia, for example, labour force surveys are based on the ILO definition, but national unemployment data adapt the lower and upper limits to deflate figures for youth unemployment and to reflect the fluctuations that are occurring in retirement age (Kutsar).

AGE AT LABOUR MARKET ENTRY

Age at entry into the labour market varies considerably both within and between EU member states, and it also fluctuates according to pressures exerted by the European Commission to encourage harmonization. For example, the 1989 Community Charter of the Fundamental Social Rights of Workers (§ 20) recommended that the minimum school-leaving age should be set at 15. All the IPROSEC countries except Italy had adjusted actual school-leaving age upwards by the late 1990s. Compulsory schooling continued to the age of 15 in Greece and Ireland. In the other EU member states in the project, it was 16. Italy was due to raise the age from 14 to 15 following a decree issued in 1999. In Germany, part-time education was compulsory up to the age of 18. Despite the overall increase in the proportions of young people continuing their education after compulsory schooling, national differences are found in participation rates and in the length of time spent in further and higher education. The overall proportion of young people aged 15–19 in education and training in the late 1990s was over 83%, but the rate ranged from around 93%

in France and Germany to nearer 71% in the United Kingdom (European Commission, 1999b, pp. 127–42).

The interpretation of data on education and training is problematic because the definition of training is subject to considerable variation from one country to another. Initial vocational training may be entirely school based, or it may involve placements in firms. More than half of vocational training in the EU in the late 1990s was being delivered, at least partly, at the workplace. In France and particularly Sweden, however, it took place essentially in an educational or training institution. By contrast, Germany was characterized by an arrangement whereby training was primarily 'on-and-off the job'. In the United Kingdom, where rates for training carried out in education or training institutions were at a level close to the EU average, a relatively large proportion of vocational training was also on-and-off the job (Eurostat, 1998b, figure 7).

When information about education and training is combined with data on the availability of jobs and access to lasting employment, the proportion of young people aged 14/15–19 described as being economically active (see below) in the mid-1990s ranged from about 10% in France to almost 50% in the United Kingdom (Eurostat personal communication). Significantly, however, from 1999, Eurostat ceased to break down the lower age groups to show rates for 15–19 year olds. National statistical offices, in France for example, were also no longer reporting rates for this age group (Letablier).

AGE AT LABOUR MARKET EXIT

At the other end of working life, the age of labour market exit is also subject to considerable variation both within and between countries over time. Older people have been leaving the labour market at an earlier age, either because they are reaching compulsory retirement age or because they are taking early retirement. Most countries operate an official retirement age, but it may differ between occupations and between men and women. Occupations such as mining or the armed forces have, for example, traditionally applied a lower age, but it is not uncommon, particularly in the professions, in public sector office and in private sector management, for incumbents to retain their positions after the standard age of retirement. In France, pressure is mounting in some occupations, notably the fire service and among lorry drivers, to lower retirement age (Letablier). In Sweden, by contrast, the official retirement age is 65, but workers are encouraged to continue to the age of 67 (Jönsson).

Gender differences in the official retirement age are gradually being eliminated in EU member states, as governments are required under European law to apply the same retirement age to men and women on the grounds of equality of opportunity. In Estonia too, pension age for women is due to be aligned with that for men at age 63 by 2016. In the year 2000, it was 60 for men and 55 for women. The reasons behind the change would seem to be aimed less at achieving greater equality than at reducing the financial burden on the state as a result of the longer life expectancy (ten years) of women compared with men (Kutsar).

Pressure has been growing for governments in EU member states to review retirement age upwards to deal with the predicted increase in the old age dependency ratio. Even in countries such as France where it is politically unacceptable to raise retirement age, the number of years of contribution has

been increased to 40 in the private and 37.5 in the public sector to qualify for a full pension (European Commission, 1998b). The changing age of retirement in transition countries, as they align themselves more closely with EU member states, exemplifies the problem of data collection over time. This is aptly demonstrated by the case of Hungary, where retirement age has shifted from 55 for women born before 1 January 1940 to 62 for those born after 31 December 1946. For men, it changed from 60 to 62 years for those born at the beginning and end of the year 1938 (Neményi).

EARLY RETIREMENT

The definition of the population of working age is further complicated by the issue of early retirement, which was widely used in the 1980s and 1990s as an alternative to long-term unemployment or extended sick leave. In some countries, only a relatively small proportion of the population continues in employment to the legal age of retirement. In the industrial sector, early retirement was encouraged to reduce the wage bill and to make jobs available for younger people. Many older people in declining industries were made redundant before they reached retirement age and were unable to find another job. In some cases, they were offered early retirement packages, and in others were classified as being 'unfit for work', rather than being categorized as unemployed. They were thus able to draw an invalidity pension. By the mid-1990s, only 32% of men aged 60–64 were still economically active across the EU. At age 55–59, the EU average was 67.5%, ranging from 85% in Sweden to below 60% in Italy (European Commission, 1996b, pp. 49–50).

In Estonia, the law provides for the possibility of early retirement up to three years before the normal retirement age. In this case, however, the pension is reduced by 0.4% for each month of earlier retirement. This may help to explain the low incidence of early retirement in Estonia, where it accounted for only 1.3% of all recipients of old age pensions in 1997 (Kutsar). In combination with the increase in the official retirement age, the low rate of early retirement means that the population of working age has been sustained to a greater extent than in the other two candidate countries and in the EU member states as a whole (European Commission, 1999b, pp. 127, 146–8).

Within EU member states, differences were found in age of retirement for men in the mid-1990s according to educational qualifications: the higher the level, the greater the likelihood of remaining in the labour force until a later age. Women were less affected as, overall, more women were remaining in and returning to the labour market after raising a family (European Commission, 1996b, p. 51). In the candidate countries, such as Hungary, where women had established full-time continuous patterns of employment, they are entitled to take early retirement after completing a certain number of years in the labour force. Women born in 1942 can take early retirement after 34 years in work, for example, or after 38 years if they were born in 1946 or later. For men, early retirement is a possibility after 37 years in work if they were born in 1938, and after 38 years for those born in 1939 or later (Neményi). Another policy recognizing the contribution to society made by women as mothers, implemented in France for example, is to credit the number of years spent raising children as pensionable service (Letablier).

Defining the labour force

Calculations of the dependency ratio based on age are misleading, since not all individuals of working age are necessarily participating in the labour force, and the age categories for young and older dependants include individuals who are employed. Policies formulated to deal with the dependent population, therefore, need to be informed by accurate data on patterns of labour force participation as well as economic activity. For comparative purposes, it is important to be aware of the ways in which indicators of trends in the labour force are compiled and interpreted in different national contexts, not least because they are often used to make a political point.

LABOUR FORCE PARTICIPATION

The term 'labour force', as defined by Eurostat (1996), represents the sum of persons aged over 15 (with no upper age limit) who are in a job, are unemployed or inactive. The population in employment is defined as those who during the reference week did any work for pay or profit, or were not working but had jobs from which they were temporarily absent, irrespective of the number of hours worked.

EMPLOYMENT RATES

Employment rates for women, so defined, may misrepresent their actual situation in the labour force to a greater extent than rates for men. Data on women's work may, for example, be distorted due to factors such as the prevalence of informal work (unregistered childminding), or the eligibility criteria for registering as unemployed. The definition of employment raises the question of whether women on maternity leave and parents taking parental leave are categorized as being 'temporarily absent' from their job. Under the 1992 directive on the safety and health at work of pregnant workers and workers who have recently given birth (92/85/EEC), employers in EU member states are required to guarantee reinstatement after statutory leave. Practices vary, however, from one country to another. In the United Kingdom, for example, the conditions for reinstatement are restrictive. In Hungary, women on maternity leave are not included in the employment count, and parents on paid leave are counted as economically inactive (Neményi).

UNEMPLOYMENT RATES

The unemployed population are defined as those who, during the reference week, had undertaken less than one hour of work for pay or profit, were available to start work within the next two weeks, and had actively sought employment during the previous four weeks. Although the ILO definition of unemployment is widely used for comparative purposes, many countries rely on official registered national unemployment figures taken from sources other than the Labour Force Survey, which are less likely to be directly comparable. National figures produced by social security offices or labour exchanges based on persons registering as unemployed or seeking work are considered to be wholly incomparable between countries as they include or exclude any and every different combination of the following: persons seeking only full-time

work, seeking any part-time work, seeking work of over 18 hours, seeking work of over 20 hours; persons claiming benefit; persons available for work for 30 days after registration, or are immediately available, or are in a job with a short-term contract, or are working less than 12 hours a week, or are wholly unemployed or are seeking their first job; are compulsory or voluntarily registered; are in an insurance fund, or are not in an insurance fund (Threlfall, 2000, p. 327, based on Eurostat definitions).

For registration as unemployed, the Hungarian statistical office uses a slightly different definition of unemployment. The unemployed are described as being among the job seekers registered with the National Labour Methodology Centre, are out of employment, not pensioners or students, not in employment facilitating promotion (such as re-training or community service), are looking for work and are prepared to accept a job if offered' (Central Statistical Office, 2000, p. 7). The claimant count is a measure used in the United Kingdom, whereas Germany records as 'employed' those registered as paying social insurance. Casual jobs, workfare schemes, training, paid parental leave, or the refusal to take a job, which affect social insurance status, may result in elimination from lists of job-seekers/unemployed.

The distinction between unemployment and disability (as well as unemployability) has also become blurred. In addition, official figures may not reveal the full extent of unemployment in cases where workers are 'discouraged' from registering for work, and unemployment may be 'disguised' when 'short-hours' part-time jobs are taken by those wanting full-time work (see also 'underemployment' below).

Data on female unemployment are particularly difficult to interpret and compare within and between countries. In the early 1990s, for example, the figure derived from national data for female unemployment among women aged under 25 in Germany was found to be 32% above that produced by Eurostat (Besson and Comte, 1994, p. 554). Women in France who take up paid parental leave (*allocation parentale d'éducation*) and were previously registered as unemployed undergo a change of status: they are no longer considered as belonging to the economically active population. Instead, they are temporarily recorded as inactive (Afsa, 1996), whereas women in employment who take paid parental leave continue to be counted as members of the labour force and have the right to reinstatement at the end of the period of leave.

In Estonia, since no official measure of unemployment was applied under the Soviet system, no information is available using either ILO or other criteria for the period before transition. The first ever statistics on unemployment were collected in the Living Conditions Survey in 1994 (NORBALT), using the ILO definition. Retrospective estimates have been made of unemployment rates prior to 1994, but they have limited value. The data collected after 1994 are also problematic, particularly for the 15–24 age group. Although the sample size was relatively large (around 10 000), the majority of people belonging to the lower age group were in education, and only a small number were considered to be in the labour force (Kutsar).

ECONOMIC ACTIVITY RATES

Economic activity and inactivity rates, as used by Eurostat in Labour Force Surveys, following the ILO definition, are broader than the employment / unemployment count. The choice of term depends on whether the state is primarily concerned with measuring the size and structure of the economy or the labour market. From a gender point of view, the categories of activity and inactivity are more encompassing because it is possible for individuals to be economically active as producers or caregivers of non-market goods and services without necessarily being in the labour force (Threlfall).

Conventional activity rates are the percentage of people who either have a job (that is they are employed or self-employed), or are unemployed calculated over the population aged 15 or over. Aggregate economic activity rates, like those for employment, are usually presented with reference to the population of working age, that is aged 15–64, as discussed above (European Commission, 1999b). The active population excludes individuals living in institutions (university residences, hospitals, the prison population) and young people undertaking military service (Eurostat, 1996).

ECONOMIC INACTIVITY RATES

The inactive population covers all those not classified as employed or unemployed. More precisely, inactivity includes those who declare they have not undertaken any work for pay or profit and are not seeking work and/or are not able to take up employment within two weeks of finding work (Eurostat, 1996). Women who record themselves as homemakers (see below) would, therefore, be classified as inactive.

The inactive category includes what are often described as 'discouraged workers'. Although the term is not used officially in Eurostat nomenclature, a record is kept of the reasons why 'inactive persons' are not seeking employment or are unwilling to work. Discouraged workers are people who would like to work and would be available for work if a suitable job became available but who are not actively seeking work because they do not think they will find a job. They are, therefore, excluded from unemployment figures. The term 'discouraged workers' may also apply to those not in a position to take a job immediately, if offered, because they have family responsibilities and could not make the necessary childminding arrangements, which is a situation frequently mentioned in the United Kingdom.

Estonia uses another term, 'economically inactive household member', which is included in the labour force terminology and means a person who is not gainfully employed, is not seeking work, and is not ready to start work if it is offered. This category is subdivided into two types by gender, one referring to men who are 'discouraged', and the other referring to women, who have the main caring responsibilities (so-called informal carers, looking after children, older, sick or disabled household members), otherwise described as housewives (Kutsar).

PUBLIC SECTOR EMPLOYMENT

When policies are introduced to improve the working conditions for parents, and especially women with children, the public sector is often used as a trail

blazer, setting the example for the private sector. The public sector is, however, generally characterized by lower paid and lower status jobs, where women tend to be concentrated (see Section 2 in this volume). It is therefore of interest for a comparative analysis of the relationship between changing family structure and public policy to examine how employment in the two sectors is defined.

The general shift in most EU member states towards the privatization of public utilities (telecommunications and transport for example) has reduced the share of the labour market in enterprises under state ownership, but no precise figures are available across the EU to record these changes. In addition, employment statistics and public sector provision are increasingly difficult to correlate in EU member states because of trends towards the contracting-out of services. International comparisons of the share of employment in the public and private sectors are unreliable due to differences in the definitions and conceptualization of employment in the public sector and public administration. The category used by Eurostat 'public administration' does not cover all public sector workers and, therefore, provides an incomplete picture.

In addition, national practices diverge. For example, national data for France cover three distinct categories of public servants. The first category for the state civil service includes employees in different ministries and public establishments, such as the post office and France Telecom, as well as teachers in private schools that have a contract with the state. The second category for territorial administration covers regional and local authority employees. The third category is reserved for public sector hospitals (Letablier). The statistical office in Sweden also distinguishes within the public sector between central government, municipalities and county councils. At local level, teachers and social care workers are public sector employees, while health workers are employed both by local authorities and county councils. (Jönsson). The national Labour Force Survey statistics in Ireland have a 'public administration' category, which covers those employed in 'law and order, national defence, local authorities, other government departments, libraries, sanitary services, and administration of cemeteries by local authorities' (McGauran, personal communication with Central Statistics Office, Ireland). Teachers come under a separate category for 'Professional services' and health workers under 'Medical and other'. In the census, there is no 'public administration' category: for example policemen and women are listed under 'lower professional, lower managerial'.

Transition has altered the definition of the public sector for the applicant states, making comparisons over time problematic. In Hungary, the definition of the public sector has changed several times since the 1980s. In the 1990s, it adopted the recommendation of the ILO on defining the public sector, understood to include those working in public administration, health and social services and education (Kézdi, 1998).

In Estonia, public sector employment includes people working in organizations financed from the state budget (teachers, cultural and medical workers), public servants (civil servants and local government officials). Their existence was made statutory following a referendum on 28 June 1992, and formalized by Parliament in the Public Service Act on 25 January 1995. People working in organizations funded by local government are also considered as public servants. Data on public sector employment are incomplete because official statistics have not been sufficiently developed, and no statistical

surveys were conducted before 1996. More systematic data gathering began in 1996, and by 1999 basic information about the public sector became available (Randma, 1999). Reliable data on public administration and public sector employment can be found in the Annual Report on Public Services, published by the State Chancellery of Estonia, although the definitions applied by the Statistical Office and the State Chancellery are inconsistent (Kutsar).

HOMEMAKERS

The term homemaker is not used in Eurostat Labour Force Surveys, but it is often found in studies of the division of labour in households, and it is referred to in reports on the ECHP to describe the person (usually the female partner) in a couple who declares his/her primary occupation to be responsible for the home. This does not mean that s/he may not also work outside the home, but such work is seen as a secondary activity and usually involves short part-time hours. The absence of terminology in labour force surveys to represent the unpaid work of homemakers and caregivers can be seen as a reflection of the preoccupation of government institutions with the value of GDP, which cannot be measured unless exchanged in a market (Threlfall).

In Spain, the position of the homemaker is more openly considered in surveys and opinion polls. Homemakers' opinions are always recorded in a standard division of the category of inactive people into students, the retired and homemakers. However, this assumes that individuals defined as homemakers are not likely to seek work outside the home because they would otherwise fall into the category of active people (Valiente). In Hungary, by contrast, the term 'homemaker' is used in the census as an employment category rather than as a category of the inactive population (Neményi).

Measuring working time

While the participation of working age men, defined as aged 15–64, in the labour force was declining during the 1990s in EU member states, that of women was increasing. However, the hours worked by women remained well below those for men. Although the issue of labour shortages was not high on the EU agenda, the Commission was developing policy responses to the predicted longer term downturn in the labour supply (Rubery and Smith, 1999), and to the need to modernize social protection systems to cope with the consequences of accelerated population ageing (COM(97)102 final). It was argued that the potential of the labour supply was not being used because younger and older workers, and particularly women of working age, were not participating to their full capacity.

UNDEREMPLOYMENT

According to the ILO, the population of working age is underemployed if individuals are, involuntarily, working fewer than the standard number of hours for their occupation, are seeking additional work or are available to undertake such work. Eurostat data are available showing the reasons why part-time workers are not working longer hours. Short-hours working accounts for about 20% of part-time work in the EU (Eurostat, 1998a, table 078). It is most prevalent in countries with a high proportion of part-time workers and,

significantly, with some of the lowest unemployment rates for women (Threlfall, 2000).

Underemployment may apply to workers who have been laid off on less than full pay, as in the United Kingdom. In France, only workers on part-time contracts or who state that they would like to work longer hours are classified in this category (Letablier). In Estonia after transition, the term 'underemployment' was used to refer to a situation where workers were forced to take an unpaid vacation, due to the financial hardship of an enterprise. Data are collected on underemployment in sample surveys on living conditions (Kutsar).

In Hungary, although the term is not used and no data are available, certain population groups are particularly affected by underemployment, such as young people who have not yet entered the labour market, women who are economically inactive or who are working part-time, people working short hours and those unable to find a full-time job but who are seeking one, and older people below retirement age who are not working full-time (Neményi).

WORKING HOURS

Actual working hours are difficult to measure in occupations where workers are not required to 'clock in' or keep time sheets and where working time is not regulated by law. In Germany, women working less than 19 hours per week and earning below a set threshold are not recorded as economically active and are not entitled to unemployment pay. In the United Kingdom, earnings below a certain threshold are exempt from social insurance and taxation. At the other end of the scale, in many countries the long working hours of professionals often go unrecorded.

Labour Force Surveys differentiate between hours actually worked and hours usually worked and group them into bands: 1–10, 11–20, 21–30, 31–40, 41–50. Such data are often not comparable for different categories of workers, over time and across countries. Eurostat specifically excludes lunch and other breaks from the count of the number of hours worked, though the practice is not widely observed, as for example in France, where the exclusion of breaks from the 35 working week is contested (Letablier). Disparities can also be found in the way in which breaks are counted for part-time and full-time workers. Part-time workers may not be entitled to lunch breaks, whereas breaks may be included as part of the normal (contractual) working day for full-time workers.

In Estonia, working time is regulated by the Public Services Act (passed in 1995) and by the Employment Contracts Act (introduced in 1992). Standard working hours are 40 hours per week, but the actual hours worked are recorded in cross-sectional surveys (Aasland *et al.*, 1997). As in the Eurostat definition, lunch and other breaks are excluded from the count of the number of hours worked for full-time workers (Kutsar).

PART-TIME WORKING

Part-time work is particularly prone to misrepresentation. In principle, it is defined by Eurostat as fewer hours than the norm for a particular type of job. Considerable variations can be observed between countries in definitions of part-time work. In Greece, in the 1980s part-time work was considered as fewer hours than those provided for in collective agreements for the type of job

concerned. In Italy, a person was considered as part-time if working less than the hours normally worked in the particular type of employment (Eurostat, 1988, p. 57).

In the United Kingdom, until 1983 the part-time category was restricted to employees, and the self-employed were automatically considered to be working full-time. For internal purposes in the General Household Survey, persons who worked 31 hours or more a week were classified as full-time, whereas those working 30 hours or less were part-time. Germany defined part-time working hours as 1–36 hours a week, implying a commitment below the normal working hours as set by collective bargaining (Blossfeld, 1994, pp. 18–19). Most countries have moved towards self-definition in their own statistics, which may be helpful in terms of international comparability but creates problems for comparisons over time if they previously used a set number of hours to define working time.

Eurostat (1996, p. 65) now bases figures for part-time work on spontaneous replies from respondents, but on the understanding that part-time should not involve more than 35 hours and that full-time normally starts at around 30 hours. Data can be checked against the number of hours actually worked. In France, part-time refers to workers whose monthly working hours are 20% or more below the statutory number of working hours, but in some cases the standard used is that of the firm and is agreed when the employee is taken on (Letablier). In Hungary and Estonia, part-time working hours are anything less than 35 hours per week on a regular basis (Frey, 1999).

Comparing family change

The indicators selected for discussion here represent only a small proportion of the possible measures that can be used in analysing socio-demographic trends. As in the other papers in the present volume, this synopsis compiled from national contributions illustrates the interest of locating indicators in relation to the economic, social and political environments of the countries in the project. The problems of measuring changes in the various dimensions of family life, examples of which have been highlighted in this paper for the IPROSEC countries, call into question the validity of many of the comparisons carried out over both time and space. The applicant states offer illuminating examples of the problems of adopting international measurement criteria, particularly over time, since it is not generally possible to recalculate data collected during the Soviet era, if indeed they existed; unemployment is a case in point. The first Labour Force Surveys using international criteria were undertaken only in the 1990s, and data collection sources and methods are being revised to bring them into line with the harmonized data collated by Eurostat. The timing of population censuses is also relevant for an analysis of trend data. The results of the findings from the 2000 Estonian census start to become available from 2001, and Poland's census is scheduled for 2001. This means that data collected according to EU definitions are gradually coming on-stream, but may not be comparable with earlier data for the same countries.

The conclusion can be drawn from this review of the indicators widely used to record and track socio-demographic change at macro level that more standardized time series data are needed before reliable comparisons can be made and used to inform policy. This observation applies not only at national

but also at EU level. Finer grain analyses of data are becoming available as successive waves of the ECHP surveys record the development of family life across EU member states. However, they do not remove the need for analysis at subnational level if the reality of family formation and structure are to be more fully appreciated not only by researchers but also by policy actors in EU member and applicant states.

4. Conceptualizing family policies

Family policy is often taken to mean 'a defined set of goals, pursued by a coherent set of policies, and implemented through an institutional framework of a designated government department' (Millar, 1998, p. 121). Even though this definition is couched in broad terms, it is not readily applicable to all the countries covered by the IPROSEC project. Most EU member states do not, for example, have a designated government department responsible for formulating and implementing a set of policies aimed at supporting families. Several countries cannot be said to pursue a coherent family policy agenda or to have a defined set of goals specifically targeting the family as a unit.

In one of its early reports, the European Observatory on National Family Policies also adopted a broad definition of family policy but it introduced another element that could be considered problematic by some governments. Reference was made to 'measures geared at influencing families' but excluded measures implemented in other policy areas that had unintended outcomes, or impacts, for families (Dumon, 1991, p. 9). The report published by the European Commission in 1994 (United Nations' International Year of the Family) extended the definition of family policy that the European Observatory was given the task of tracking and monitoring to cover policies targeting families as groups rather than individuals. It also took account of the family dimension in social and fiscal law, including private sector provision and the family impact of all policies (Dumon, 1994, pp. 325–6).

Not every government, however, explicitly identifies the family unit as a target for policy. Sweden is a notable example of a country where policy is aimed at protecting and promoting the interests of individuals rather than of the family as a unit. The extent to which policy should influence families is also contested. All the countries in the IPROSEC project have implemented measures, through taxation and benefits, that redistribute resources, either horizontally between families from those without to those with children, or vertically from wealthier to poorer families. The legitimacy of such transfers is not accepted unquestioningly, particularly when the burden of paying for them rests largely with employers, as was long the case in France for example.

If the criterion is adopted that family policies should have the family as their target population, many of the measures examined in analyses of national family policies may not, strictly speaking, fall within this policy domain. Few member states readily admit, for instance, that policies in areas such as childcare and parental leave are directly aimed at the family unit. Policies that might be construed as indicating that the state is seeking to influence family formation and structure, including decisions about the timing and number of births, the management of family time and family lifestyles, raise much greater opposition.

Even if family matters are accepted as a legitimate target for national policy in some countries, at international level family policy remains a disputed concept (Hantrais, 2000a, chapter 5). Countries with constitutions that legitimate state intervention in family matters and lay down the conditions under which couples can marry and form a family unit may be found to contravene articles 8 and 12 of the Council of Europe's 1950 European

Convention on Human Rights. Article 8 of the Convention seeks to promote the right to respect for private and family life:

1. Everyone has the right to respect of his [*sic*] private and family life, his home and his correspondence.
2. There shall be no interference by a public authority with the exercise of this right except such as is in accordance with the law and is necessary in a democratic society in the interests of national security, public safety or the economic well-being of the country, for the prevention of disorder or crime, for the protection of health or morals, or for the protection of the rights and freedom of others.

Article 12 goes on to stipulate that:

Men and women of marriageable age have the right to marry and to found a family, according to the national laws governing the exercise of this right. (The European Convention on Human Rights, signed in Rome on 4 November 1950)

Governments in some member states that have gone too far in using the powers of the constitution to introduce policies intended to influence family size and structure have found themselves in conflict with the European Convention. Cases brought before the courts have, consequently, helped to clarify the obligation of the state towards families, for example by affording legal protection to children born out of wedlock (Meulders-Klein, 1992). Some EU member states, such as Ireland and the United Kingdom, have interpreted article 8 to mean that the state should not interfere in family matters. In the United Kingdom, for example, state intervention has long been considered socially acceptable only in cases where a family member, usually a child, is at risk.

In 1999 an Expert Group on Fundamental Rights (European Commission, 1999a, p. 23) recommended that these articles from the European Convention should be incorporated into Community law. The text finalized at the Nice summit during the French presidency in 2000 reproduced article 8 of the Convention (renumbered as article 7 and headed 'Respect for private and family life'), but it was couched in gender-neutral language and a form of words more appropriate to the technological age: 'Everyone has the right to respect for his or her private and family life, home and communications.'

A slightly reworded version of article 12 in the Convention, confirming the link between marriage and family formation, was included as article 9 in the Charter: 'The right to marry and the right to found a family shall be guaranteed in accordance with the national laws governing the exercise of these rights.' National governments were thus allowed the discretion to determine their own legislative framework in line with the subsidiarity principle and in recognition of national differences.

Further references are made elsewhere in the Charter to the rights and duties of parents. Article 14 on the 'Right to education' stipulates that 'the right of parents to ensure the education and teaching of their children in conformity with their religious, philosophical and pedagogical convictions shall be respected, in accordance with the national laws governing the exercise of such freedom and right.' The rights of children are set out in article 24. In addition to being afforded the right to care and protection and the right to express their own views, the Charter recognizes that a child should have 'the right to maintain on a regular basis a personal relationship and direct contact with both

his or her parents, unless that is contrary to his or her interests'. The rights of older people and of persons with disabilities to social integration are recognized (articles 25 and 26), but without assigning the responsibility or duty of caring for them either to family members or the state.

Article 33 is specifically concerned with 'Family and professional life', stating unequivocally that:

1. The family shall enjoy legal, economic and social protection.
2. To reconcile family and professional life, everyone shall have the right to protection from dismissal for a reason connected with maternity and the right to paid maternity leave and to parental leave following the birth or adoption of a child.

Although the Convention implies that marriage is a prerequisite for family building, it says nothing about the rights of unmarried cohabiting couples, and even less so of same-sex couples. The second of these issues began to be addressed by the 1997 Treaty of Amsterdam, which outlawed discrimination on grounds of sexual orientation (article 13 of the Consolidated Treaty). Article 21 of the 2000 Charter on 'Non-discrimination' echoes the Treaty and develops further the list of areas where discrimination is outlawed to encompass 'sex, race, colour, ethnic or social origin, genetic features, language, religion or belief, political or any other opinion, membership of a national minority, property, birth, disability, age or sexual orientation'.

The principle of equality between men and women is restated in article 23. Reference is made to the maintenance or adoption of 'specific advantages in favour of the under-represented sex', the term that replaced 'women' in the Agreement on Social Policy appended to the Maastricht Treaty and in the Consolidated Treaty following Amsterdam in 1997 (article 141). Although the equality principle is to be 'ensured in all areas', specific reference is made in the Charter to 'employment, work and pay', but not to the home.

The Charter on Fundamental Rights is not a legally binding instrument and is not expected to become a general source of legal rights in the same way as the European Convention. If and when the articles referred to here are incorporated into Community law, governments may, nonetheless, find that their constitutions and national law have to be revised to avoid being taken to the European Court of Justice. The introduction of family rights into European law could, for example, bring greater scrutiny not only of the implementation of policies influencing family structure but also of the procedures for monitoring the impact of policies in other areas. It will, however, involve delicate negotiations at European level due to the need to respect 'the national laws governing the exercise of these rights'.

One of the central hypotheses in the IPROSEC project was that membership of the European Union might be a factor influencing policy development, either because member states share the core objectives underlying shifts in policy at European level, or due to obligated policy transfer as they are required to adapt national legislation to bring it into line with Community law. The Mediterranean member states and Ireland, in particular (see FitzGerald in the second issue in this series of papers), have had to adapt national law and practice to conform to European legislation. The need to reduce the government deficit in Italy to meet the criteria for monetary union involved a 'policy of sacrifice' that was borne by the family (Del Re). Despite its widely acclaimed record on equal opportunities, Swedish membership of the

EU forced revisions to its national laws on equality (Bergqvist and Jungar, 2000). Many of the reforms taking place in the applicant states from Eastern Europe are being driven by the need to meet the criteria for EU membership. Its impact on the national policy process is thus an important and recurring theme throughout the contributions presented in this series of *Cross-National Research Papers* and is identified as one of the many factors shaping family policy at individual, national and international level.

More specifically, this section explores national interpretations of the place of the family in the relationship between the public and private spheres in the eight EU member states and three candidate countries included in the IPROSEC project. From a comparative perspective, it examines 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. Drawing on the examples discussed throughout the paper, an attempt is made in the conclusion to characterize family policy in EU member and applicant states, by reviewing changes in the way it has been conceptualized over time in different policy contexts.

Legitimacy of family policy

The IPROSEC project is based on the premise that approaches to family policy vary over time and space. Both within and between countries, marked differences can be observed in the extent to which family policy has been legitimized and institutionalized and has figured on the agenda of governments as a specific policy domain. Variations in the way the family is defined and taken into account in legal statutes reflect persisting differences not only in the principles underlying national family policies, but also in the socio-economic and political climate, political affiliations and policy regimes, determining how these principles are conceptualized, formulated and implemented.

Some countries have a long history of interest in family affairs, which has been translated into constitutional and institutional structures, reflecting the degree of social acceptability of state intervention in this policy area at different points in time (Hantrais and Letablier, 1996; Hantrais and Lohkamp-Himmighofen, 1999). The examples of the institutional and legal frameworks provided below are used to compare the ways in which policy has formed and developed in the countries studied in the IPROSEC project.

THE FAMILY IN THE NATIONAL CONSTITUTION

With the exception of the United Kingdom, which does not have a written constitution, and Sweden, where the revised constitution of 1998 does not refer directly to the structure of the family, the constitutions of the member states in the project and the three applicant states lay down the normative institutional framework of the family. They generally recognize it as a social institution founded on marriage and to which the state owes protection. The Swedish constitution promotes the development of democratic ideas across the whole of society and equal rights for women and men.

The way the family is conceptualized in national constitutions varies, however, from one country to another. Of the 11 countries under study, France

and Germany, though in different ways, have probably gone furthest in lending institutional weight to the recognition of the responsibility of the state as a family policy actor, whereas Ireland and the United Kingdom are found at the other end of the spectrum. The 1949 constitution in Germany provided a rigid and restrictive framework for family law. It attributed responsibility to the state for protecting marriage and the family, placing particular emphasis on the legitimacy of the relationship between partners within marriage.

In both Italy and Spain, in reaction to authoritarian regimes, the constitution has shifted away from providing a strict normative framework. In Spain, the constitution explicitly refuses to distinguish between children born in or out of wedlock or according to the civil status of their mothers (Valiente). In Italy, the constitution specifies that the state has a duty to assist families in carrying out their tasks, particularly in the case of large families. The constitution has declared the family to be a private domain, but it justifies intervention to protect women as workers, with the aim of enabling them to fulfil their essential family function (Bimbi, 1993).

In France and Greece, the constitution set out to provide an enabling and supportive framework for family law. In France, the 1946 constitution conferred on the state the responsibility for ensuring that individuals and families are afforded the conditions necessary for their development. The Greek constitution stipulates that the state has a duty to provide for the special needs of large families, young people, war widows, orphans and other categories of population at risk (Moussourou, 1994).

In Ireland, although the constitution of 1937 established the state as the guardian of the family founded in the institution of marriage, this commitment has to be balanced against the recognition of the private nature of the family unit and the need to protect it against outside intrusion. Another area of potential conflict within the Irish constitution results from the prescription that mothers should not be obliged by economic necessity to engage in paid work outside the home if this means they neglect their duties towards their families (Kiely and Richardson, 1994).

In the absence of any constitutional prescriptions, the United Kingdom, like Ireland, has been one of the strongest advocates of the family as a private domain. While admitting that the care of children is a public responsibility, governments respect the fact that families are private institutions (Speech by the Home Secretary, 28.07.98).

Hungary's constitution of 1949 also provides for the special protection of marriage and the family, but this does not mean the state should intervene to prevent or hamper the dissolution of marriages that have irreparably broken down. The autonomy and independence of married couples is upheld, but the state reserves the right to act in the interest of the family as a whole (Takács). The constitutions drawn up in Estonia and Poland after independence devote attention to the place of the family in society and to the role of the state in protecting the rights of family members. Despite the fact that they were drafted in the 1990s, they continue to emphasize the link between marriage and family formation and the rights and duties that ensue between spouses and their children. The Estonian constitution, which was instituted following a referendum held on 28 June 1992, confirms the legitimacy of family policy. The family is presented as being fundamental to the preservation and growth of the nation and as the basis of society. It must, therefore, be protected by the state. The

constitution stipulates that spouses have equal rights and that, by law, parents have the right and the duty to raise and care for their children and for family members in need (Kutsar).

The Polish constitution, instituted in 1997, affirms that marriage, family, motherhood and parenthood are protected by the state. It affords women and men equal rights not only with respect to political, social and economic life but also in family life, specifying that the state must take account of the wellbeing of families in its economic and social policies. Large families and lone-parent families are identified as having a right to special assistance from public authorities (Warzywoda-Kruszyńska and Krzyszkowski).

INSTITUTIONAL RESPONSIBILITY FOR FAMILIES

References to the family in national constitutions are not necessarily translated directly into designated ministerial positions. Among the countries in the IPROSEC study, France and Germany have again probably gone furthest in lending institutional weight to the recognition of the responsibility of the state as a family policy actor. During much of the postwar period, both countries consistently gave a high profile to family matters by instituting government departments with responsibility for this domain of policy. At the turn of the twenty-first century, Germany was, with Ireland, the only IPROSEC country to have a designated ministerial department with 'family' in the title. The brief of the ministry concerned with family matters in Germany also covered senior citizens, women and youth. Under the Jospin government in France, family policy fell within the remit of the overarching Ministry for Employment and Solidarity (MISSOC, 2000).

Italy, the third IPROSEC country from the first wave of EEC membership, momentarily had a ministerial office for family policy when, in 1994, the Berlusconi government created a ministry without portfolio to advise the government on family matters. Subsequently, family measures were again placed under the auspices of the Ministry of Labour and Social Welfare.

Of the countries in the project that joined the EU in subsequent years, by the year 2000 only Ireland had a government department that made reference to the family in its title: Department of Social, Community and Family Affairs. A second department combined responsibility for health and children.

Interestingly, all three applicant states have designated ministries with responsibility for family matters, although in Estonia it is without portfolio. Poland established a Ministry for Family and Women's Affairs in 1995. After the restructuring of the Prime Minister's Office in 1997, the Ministry for Family and Women's Affairs was dissolved, and a Department for Family Affairs was set up within the Prime Minister's Office (Warzywoda-Kruszyńska and Krzyszkowski). Hungary instituted a Ministry of Family and Social Affairs in 2000 (Takács). In Estonia, the Ministry of Social Affairs in the government prior to 1999 had a Family Board. Significantly for the present study, the government in power in 2000 established a Ministry of Population and Family Issues, whose main concern was to formulate policy responses to what were seen as population problems, such as low fertility, population ageing, problem families and child protection. Family and child benefits were dealt with by the Ministry for Social Affairs (Kutsar).

Elsewhere in the EU, responsibility for family matters is often assigned to junior ministries and generally located within ministries for social affairs and/or health. At the turn of the twenty-first century, Greece, for example, had a Ministry of Labour and Social Security; Spain had a Ministry of Labour and Social Affairs; and Sweden had a Ministry of Health and Social Affairs, as well as a separate Ministry of Industry, Employment and Communication.

The United Kingdom had three separate departments dealing with health, social security, and education and employment. In this case, both child benefits and maternity pay were covered by the Department of Social Security (MISSOC, 2000). Under the Labour government in the late 1990s, co-ordination across government departments was catered for by a Ministerial Group on the Family, chaired by the Home Secretary, and by a Family Policy Unit set up in 1998 by the Home Office (Such).

In accordance with the principle of subsidiarity, national governments usually allow discretion at local level in assigning responsibility for the organization of services that directly affect families, such as housing, child and elder care. In France, a specialized non-governmental administrative agency at national level, the Caisse nationale des allocations familiales, works closely with local branches, or Caisses d'allocations familiales, to ensure the provision of a wide range of services for families, while also acting as the fund holders for family allowances and other family related benefits.

In Germany, central government exercises responsibility for family affairs jointly with the *Länder*, while in Italy, Spain and Greece, authority is delegated to local level and regional level. In Ireland, Sweden and the United Kingdom, although policy is decided at national level, local government is also given a large degree of responsibility for dealing with family matters. In Sweden, it is left to local administration to determine how best to meet national targets (Jönsson).

Local authorities are expected to work in conjunction with the voluntary sector, and increasingly with the private sector in ensuring the delivery of services, as exemplified in the United Kingdom by the New Deal for Lone Parents, which was introduced in 1997, and was designed to optimize the involvement of non-governmental agencies (Such).

The situation is similar in the applicant states. In Estonia, for example, local government has responsibility for the provision and administration of social services, including domestic services, housing and foster care (Kutsar). In Poland, the administrative reform of 1999 redefined the duties and obligations of central and local governments, assigning them joint responsibility for family affairs (healthcare, education, child and elder care as well as housing) (Warzywoda-Kruszyńska and Krzyszkowski).

Where local authorities exercise discretion, standards of provision and access to services may vary considerably from one area to another. The problems associated with local variation have, for example, been identified in relation to childcare in Germany, where the level of provision depends on the priorities and resources of each of the *Länder* (Scheiwe, 2000). In France, the decision to introduce a benefit for dependent older people, though instituted by central government, was implemented by the *départements*, with the result that marked discrepancies occurred with regard to both the level of the benefit and the conditions under which it was paid (Letablier). The second issue in this series of papers presents further examples of within-country variations, not only

with respect to differences in needs but also to the standard of services, because of disparities in the resources available at local authority level.

The legal framework for family life

In the 11 IPROSEC countries, marriage and family formation and the legal rights and duties associated with them are governed by civil law and statutes. Differences in philosophical and religious traditions, in the pace and timing of social processes and the level of public support for reform are reflected in national legislation. Analysis of the development of family and marriage law shows that family policy is a divisive topic. Decisions taken on matters relating to family life are regularly the subject of acrimonious public and parliamentary debate. Most countries have experienced the conflicts associated with the introduction of legislative reform to liberalize divorce, to lay down the conditions for custody and maintenance following divorce, for the recognition of children born out of wedlock or the rights of unmarried cohabiting couples. A topic that several governments were beginning to address at the turn of the twenty-first century was how far to go with legislation formalizing alternative family living arrangements, more especially when same-sex couples are involved. The aim in the analysis below is to gain a better understanding of the relative importance of family related issues on the policy agendas of the countries with which the IPROSEC study is concerned.

MARRIAGE AND DIVORCE LAW

Across the EU and beyond, governments have been adapting legislation to reflect changing patterns of marriage and its secularization. They have recognized the need for couples to be able to undo the ties of marriage if the relationship breaks down and for the interests of children to be taken into account.

Secularization of marriage

An indication of the extent to which marriage has been secularized is provided by the fact that it no longer has to be celebrated in a church, although civil marriage was not recognized to be as binding as a religious ceremony in Greece until 1982 (Moussourou, 1994). In some countries, for example Sweden and the United Kingdom, weddings can now be celebrated in a place other than a registry office. Church weddings were officially allowed in Estonia from the late 1990s, but only marriages performed in Civil Status Bureaux were legally recognized. From 2001, church and civil ceremonies are being given equal status in law (Kutsar). Similarly, in Poland, until 1998, only civil marriage was legally recognized (Warzywoda-Kruszyńska and Krzyszkowski).

Legal age of marriage

At a time when the average age of marriage is rising and equal rights between women and men are on the agenda at national and EU level, the legal age of marriage for women has progressively been aligned with that for men at 18, while allowing for marriages at a younger age with parental consent. At the turn of the century, the only IPROSEC country to have maintained a lower age of marriage for women was France, but even here a proposal was on the table to

raise it from 15 to 18. In 1998, Poland aligned the age for women with that for men at 18; previously it had been 21 for men, since they were considered to be eligible for marriage only when they had completed their military service (Warzywoda-Kruszyńska and Krzyszkowski). In Hungary, although the legal age of marriage is 18, some debate has been taking place over the possibility of lowering the age for Gypsies to 14 with parental consent (Kende).

Divorce

While all countries have long-standing laws regulating the age of marriage and of consent, divorce was not made legal across the 15 EU countries until 1996 when, for the first time, the courts in Ireland were given the power to pronounce a decree of divorce. In two of the applicant states, changes have been made since the early 1990s to the law on divorce. In Estonia, divorce is now regulated by the 1994 Family Law Act and is processed by the Civil Status Bureau, if the couple have no children and they make a joint request. Otherwise, the matter is settled by the courts (Kutsar). In Poland, the law on divorce dates from 1945, but legal separation was introduced in 1999 for Catholics. Separated couples are expected to continue to be faithful to one another and to provide assistance if needed. Unlike divorced couples, they are not allowed to remarry (Warzywoda-Kruszyńska and Krzyszkowski).

Unmarried cohabitation

The pace of change with respect to the legal arrangements for unmarried cohabitation also reflects national differences in attitudes towards the status of marriage within society. In parallel with the shift that has been occurring in legislation towards greater emphasis on the responsibilities and duties of parents with regard to their children, and the strengthening of the rights of children as individuals, legislators have turned their attention to alternative living arrangements, and more especially to the policy implications of lone parenthood and unmarried cohabitation.

The Nordic countries were the first of the EU member states to give formal recognition to non-conventional marriage and parenting by introducing contracts for unmarried cohabitants in the 1970s. The Swedish government does not intervene explicitly to support marriage in preference to cohabitation (Jönsson).

Few of the countries in the IPROSEC study have followed the Swedish example, although France recognized a dependent cohabiting partner as a legitimate dependant in 1978, and in 1999 was one of the few non-Nordic EU member states to introduce a formal contract for unmarried cohabiting couples: the *pacte civil de solidarité* (PACS).

Among the other EU member states in the project, mayors in some towns and villages opened voluntary registers for cohabiting partners, for example in Spain in 1994, but in the absence of legislation it was unclear what the advantages and disadvantages might be for cohabiting partners of having an official document stating that they were living together (Valiente). In the mid-1990s, only Greece did not treat unmarried cohabitants as a unit for the purpose of social assistance (Ditch *et al.*, 1996, p. 25). As the debates in France showed, a formal cohabitation contract is not an arrangement that commands universal support. In the United Kingdom, for example, public opinion has been found to oppose the formalization of unmarried cohabitation on the grounds that

such a move would imply undue state interference in private life (Lewis *et al.*, 1999). For conservatives, it could be seen as legitimizing alternatives to marriage at a time when policy should be more concerned with supporting the marriage institution. A contractual commitment between parents and children is another 'third way' alternative that would have the advantage of not interfering with the marriage contract while reinforcing the notion of co-parenting (Giddens, 1998, p. 85).

Whereas unmarried cohabitation is not mentioned in the Family and Custody Code (1964, 1998), and the issue is not being discussed by politicians, Hungary affords an interesting example of the way in which unmarried cohabitation can gain more formal recognition without entailing the constraints of marriage. Cohabitation is codified when couples are considered to be 'life companions' (Statute 1959/IV of Hungarian Civil Law). The two conditions required to qualify for 'life companionship' are that the unmarried partners form an economic unit and live together in the same household. Companions are not considered to be next of kin. Other conditions include close emotional ties, sexual relationship, and bringing up children together. 'Life companionship' can be compared to the concept of common law marriage, but is different from registered partnership. It provides the partners with only limited rights, and 'companionships' cannot be officially registered (Takács).

Same-sex cohabitation

The only EU member states in the IPROSEC project to have introduced legislation to regulate same-sex cohabitation are Sweden, with its 1987 and 1994 legislation, and the PACS in France in 1999. In Sweden, the 1994 Act on homosexual partnerships made it possible for homosexual couples to register their relationship in the same way as married couples, but they continue to be excluded from the right to adopt children. A custodial parent does not lose the right to custody of children if s/he decides to live with a partner of the same sex (Jönsson). In 1994, the municipal registers opened in Spain for cohabiting couples also applied to homosexuals. In Germany, the debate over proposed legislation had been on-going for a number of years and was still not resolved by the end of the decade.

In Hungary, on the basis of a decision of the Constitutional Court (14/1995), 'life companionship' could, in theory, also be open to same sex couples, but the government appeared to have no appetite for a public debate on the subject (Takács). The situation in Estonia was similar in the early 1990s, and the issue had not reached the political agenda by the end of the decade (Kutsar).

Lone parenthood

When lone parenthood was primarily a consequence of widowhood rather than divorce, 'choice' or an 'accident', government intervention and support were relatively easy to legitimate. The rapid growth in the incidence of divorce and, in some cases, in the number of never-married lone mothers has moved the issue onto the political agenda in several countries. The extent to which lone parenthood is seen as a problem for policy actors varies, however, considerably from one country to another, as do the ways in which

governments have tried to tackle the question of poverty and social exclusion often associated with mothers bringing up children alone.

At one end of the spectrum is France where public opinion is largely in favour of state intervention to assist lone parents (Pennec). In Sweden, the state does not specifically assist lone parents financially, but nor does it discourage lone parenthood (Jönsson). At the other extreme, in Greece, where the number of lone mothers is relatively small and extramarital births are not socially accepted, the topic has not reached the political agenda. Similarly, in Italy and Spain, no provision is made to support lone parents as a specific category.

The debate on lone parenthood in the United Kingdom is often confused with that on teenage motherhood, which is statistically a much greater problem than for other EU member states. In the United Kingdom, discussion has focused on the causes and consequences of lone parenthood and, in particular, on the cost of providing benefits and services, as well as the effect on government expenditure in areas such as health care and personal social services (Such).

In Hungary, where the government's preference is for the 'classic nuclear family' as established by married couples, and widowhood still accounts for about 30% of lone parents, no public debate has been initiated on issues relating to lone parenthood (Takács). In Poland where, as already indicated, the national constitution requires the state to take special care of lone-parent families, the government's preference is also for the family based on marriage (Warzywoda-Kruszyńska and Krzyszkowski). The situation in Estonia has been evolving since the end of the Soviet era. Although lone mothers were, and continue to be, entitled to benefits, before transition they were targeted as a priority group for housing. Since 1991 they are no longer singled out as a specific category for social assistance. Public opinion towards lone mothers has become more tolerant due to the increasing openness of society, the growing number of unmarried cohabiting couples and more pluralistic views of family life (Kutsar).

Adoption

A topic that receives less attention from the media and in political debate is adoption, except when discussion focuses on the question of whether unmarried or same-sex couples should be allowed to adopt children, as has been the case in France, Sweden and the United Kingdom. All the countries in the IPROSEC project have introduced regulations laying down the conditions under which children can be adopted by married couples. In the past, adoption was practiced largely as a means of ensuring that children who were orphaned or abandoned could grow up in a secure family environment, while also allowing childless couples to experience parenthood. More recently, as the number of children available for adoption within EU member states has been falling, governments have sought to tighten up legislation to ensure that the interests and welfare of children are protected.

In the applicant states, during the 1990s, as the large orphanages and children's homes were closed down, children were moved to smaller units or foster homes. In Hungary, in the late 1990s, around 20 000 children a year were living with foster parents, while approximately 1000 per year were being adopted (Takács). In Poland, the numbers of adopted children and of

applications for adoption declined during the 1990s, most probably due to the uncertain economic climate (Warzywoda-Kruszyńska and Krzyszkowski). In Estonia, most of the children living in children's homes have parents, and one third of them have been placed there on application by the parents. Adoption is possible only if parents sign away their parental rights, but they are often reluctant to do so because they are concerned about old age when they may need the support of their children. After independence, it became possible for children to be offered for adoption abroad, with priority being given to children with disabilities or chronic illnesses, the aim being to guarantee care that they could not receive in their own country (Kutsar).

The case for allowing unmarried cohabiting couples to adopt has not been universally accepted. Only in Sweden, can unmarried cohabiting couples adopt a child (Jönsson). Adoption by a single person is accepted in both Sweden and France. Nowhere can same-sex couples adopt a child. The subject has been widely aired by the media in Sweden and the United Kingdom. A change in the adoption policy of the Church of England's children's charity, the Children's Society, reducing restrictions on gay couples wanting to foster children, stimulated headlines such as 'Gay adoption rule weakens charity link with Church' (*The Daily Telegraph*, 30.7.99, p. 10), and: 'Church counts cost of gay adoption row' (*The Sunday Telegraph*, 17.10.99, p.7) (Such).

Reconstituted families

Law and practice are in a state of flux with regards to adoption by the new partner of the child or children from a previous relationship forming a reconstituted family. In most instances, reconstituted families are poorly defined and, therefore, poorly targeted in family policy.

In many countries, even if the child is not formally adopted, the step-parent is considered under a moral obligation towards step-children. Although step-parents are not thought to be under a moral obligation towards step-children in Sweden, it is standard practice for step-parents to adopt the children of their new partner (Jönsson). In Poland, the children of a spouse who remarries are considered by law to be members of the reconstituted family, and the new parents have responsibility for their maintenance and upbringing in accordance with the same rules as those governing parents of the first union (Warzywoda-Kruszyńska and Krzyszkowski). In Estonia, the moral obligation on step-parents to maintain step-children can be translated into a legal duty through adoption but, in practice, few cases are cited in law of biological parents handing over their parental rights to step-parents (Kutsar).

RIGHTS AND DUTIES WITHIN COUPLES

Marriage law has traditionally laid down the legal rights and duties of spouses in terms of property, power and authority within the relationship. Progressively, over the postwar period, national law and practice have been adapted to take account of changing attitudes towards equality between women and men within a marital relationship.

Obligations within marriage

In EU member states, marriage is no longer a formal bar to women's employment, and marriage law stipulates that husbands can no longer prevent

their wives from entering paid work outside the home or from opening their own bank account or owning property. By law, spouses have equal rights and duties within marriage, even if some religious ceremonies still retain references to the duty of the wife to obey (optional in the case of the Church of England). Whether or not they marry in a church, couples are expected to live together, to be faithful to one another and to provide mutual support and assistance.

An issue that is increasingly attracting media attention and that governments are beginning to address is abuse within the home environment. The problem is gaining legitimacy as an area for government intervention as the media are making the public aware of the high incidence of 'domestic violence', particularly against women and children. In some countries, the increasing coverage of the problem has led to questions being raised about the extent to which couples require assistance in preparing for life together as partners, although domestic violence is not the only reason for policy interest in supporting married life and ensuring that spouses fulfil their obligations and duties to one another.

Despite the traditional resistance in the United Kingdom to codifying obligations and responsibilities within couples, preparation for marriage is an area where governments are showing a growing willingness to intervene in an attempt to support family life. It has been suggested by the British government, for example, that couples should sign up to a clear statement of rights and responsibilities and that they should reach prenuptial agreements about the distribution of money and property. Marriage registrars should play an enhanced role in providing premarital counselling. A longer period of notice should be given personally by both parties intending to marry. Better access to mediation and counselling are recommended to support marriages in difficulty, and better information meetings before divorce (Such).

The three applicant states provide good examples of how specific the law can be about the obligations and responsibilities of married couples. Article 61 of the Polish Family and Custody Code (1994, 1998) states that spouses have equal rights and obligations in marriage. They must live together, support each other, be faithful and work together for the good of the family they have created. Although the state does not undertake to help prepare couples for married life, the Catholic Church does oblige couples intending to contract marriage to follow a programme of lectures offered by parishes (Warzywoda-Kruszyńska and Krzyszowski).

According to the Family Statute in Hungarian Civil Law (Statute 1952/IV), the rights and responsibilities of married partners are equal. Married partners are obliged to co-operate with one another in all matters concerning family life, including issues related to producing and raising children. Self-assertion and personal autonomy are permitted only in personal matters and under the condition that the 'family interest' is respected. The rights and responsibilities of married couples are stipulated. They owe one another faithfulness, especially in the context of sexual relations, and mutual support, involving caring for a sick partner, encouragement in pursuing educational and career opportunities and financial support for a partner in need. They are required to choose together their place of residence, and to develop in common property obtained during their marriage, with the exception of items belonging to the partners' own private wealth. They must use and maintain a common residence (Takács).

Estonian law affords another good example of the binding legal requirements that marriage imposes on spouses in their relationship. A spouse is required to maintain his/her partner in need of assistance and unable to work. A husband must maintain his wife during pregnancy and while she is caring for the child up to the age of three years, if the financial situation of the obligated spouse permits. A divorced spouse is under the same obligation to support a former partner who became pregnant or disabled or attained pensionable age during the marriage. This provision is extended to a divorced spouse who retires or becomes disabled within three years of the divorce if the marriage lasted at least 25 years (Kutsar).

Although most national laws recognize the equality of status between married couples, the courts have not been concerned with ensuring that this equality is put into practice in the division of labour in the home. In Sweden, while the law does not cover such intimate aspects of the relationship between partners, the Marriage Act states that spouses shall divide expenses and chores between themselves, and that both spouses, to the best of their ability, shall contribute as necessary to meet their common and individual needs (Jönsson).

Obligations within couples

Most governments have been reluctant to introduce legislation to regulate the relationships between unmarried cohabitants, mainly to avoid removing the remaining differences between marriage and less formal relationships. Legislation has been more readily accepted in some countries to regulate the rights to property jointly acquired by cohabiting partners. In Spain, the right of spouses to inherit a rent contract after the death of a spouse was extended to cohabiting couples following a case brought before the Constitutional Court in 1992, and resulted in new legislation to remove the anomaly (Valiente).

The degree of support being given to married couples in the United Kingdom is not replicated for cohabiting couples, but proposals are being put forward regarding non-religious and public child-naming ceremonies. The production of a 'guide' has also been proposed for cohabitants setting out their legal rights in relation to income, property, tax, welfare benefits and responsibility towards their children (Barlow and Duncan, 2000, p. 131).

The situation varies from one country to another with regard to benefits (MISSOC, 2000, p. 379). Unmarried partners are entitled to survivors' benefits only in Sweden and if they were living in a permanent relationship with the deceased, had previously been married or had, or were, expecting a child at the time of the death. In other respects in Sweden, unmarried couples are not granted the same legal rights as spouses, for example they cannot inherit from each other in the event of the death of one party, unless they have drawn up a will (Jönsson). Unmarried partners are eligible for some derived rights in France, particularly if they have contracted a PACS (Letablier).

The position in Estonia is that common ownership of property and housing can be confirmed by an unmarried cohabiting couple in a joint letter, or by the survivor in the case of the death of one of the partners on presentation of proof. The survivor is entitled to inherit up to half of the property. If provision for inheritance is made in the will of the deceased, it is not contested (Kutsar).

In Hungary, if one of the partners in a life companionship couple dies, the survivor can inherit property from the deceased, but this applies only to the

share of property acquired jointly. In the case of the death of one partner, the survivor must move out of the common rented dwelling in the state housing sector, since it is not possible for 'life companions' to inherit the legal tenancy title. To claim social security benefits as a dependent, proof has to be given that the partnership has lasted for at least ten years, or that the couple has been officially looking after a minor for at least one year (Takács).

Obligations between couples following divorce

The greater frequency of divorce together with the increasing economic autonomy of women have raised issues about the obligations of partners towards each other if the marriage breaks down, particularly if one or both of them form a new partnership. Usually, divorcees lose the right to maintenance if they remarry. Arrangements for pensions after divorce are being adapted to give a former spouse the right to a share of the pension earned during the years of marriage. Where such provision is made, it generally ceases if the partner in receipt of maintenance remarries or repartners. In Sweden, although spouses do not have an obligation to maintain one another after divorce, part of a pension can be transferred to a former partner (Jönsson).

In the United Kingdom, the 1999 Welfare Reform and Pensions Act codifies how pensions should be divided up following divorce in England and Wales: divorcees are entitled to half of the full pension benefit accrued over the life-course of their partner. In Scotland by contrast, only the pension accrued during the period of the marriage is taken into account. Pension splitting is not, however, obligatory, and the law allows for couples to make their own financial arrangements. Nor does the law apply to unmarried cohabiting couples or same-sex couples who separate, although this is an omission that could be subject to legal challenge under human rights legislation (Such).

In some cases, for instance in Estonia, the obligation to support a former spouse, economic circumstances permitting, applies if s/he is unable to work, on maternity leave or retired during the marriage. It does not apply if the marriage lasted less than three years, or if the former spouse remarried (Kutsar). In Poland, the arrangement for maintenance depends upon the conditions under which the divorce was pronounced. A former spouse who is recognized as not being at fault is entitled to receive financial support in accordance with his/her needs and the means of the ex-spouse. Again, the obligation ceases on remarriage. A spouse not considered to be at fault is under an obligation to pay maintenance only for five years (Warzywoda-Kruszyńska and Krzyszkowski).

In Sweden, the Cohabitees Act, which came into force in 1988, contains provision for dividing joint property when the relationship ends, but applied initially only to a jointly-owned dwelling and household goods. In 1999, it was extended to include motor vehicles. In the same year, the Cohabitees Act replaced an act covering same-sex couples. The concept of cohabitee thus refers to unmarried cohabiting couples irrespective of sex (Jönsson).

OBLIGATIONS BETWEEN PARENTS AND CHILDREN

Parental rights and duties are clearly laid down in national constitutions and in family law. These usually include the right and the duty to raise and care for children. As the technical means of establishing paternity have become more

widely available, children have been given the right to know who their parents are, and the legal pursuit of the absent father has been made easier. The extent to which these duties and responsibilities are shared with the state varies from one country to another depending on attitudes towards the legitimacy of state intervention in family matters.

Parental obligations towards children

The protection of children and of their interests is paramount across the EU and in the applicant states. If parents fail to carry out their duties, the state can intervene to remove children from an environment that puts them at risk or is considered to be harmful to their development. Public opinion is usually ready to accept state intervention in cases when the lives of young children are believed to be in danger. The debate over the legitimacy of such intervention was heightened, however, in the 1980s and 1990s in several EU member states by high-profile media coverage of cases of child abuse, not only in the child's own home but also in institutions that are charged with caring for young children.

In some cases, the responsibility of parents for their children ceases when they reach the age of 18 or when they complete their education. In Sweden, for example, the law stipulates that a child's guardian has a responsibility for his or her wellbeing and should meet his or her need for care, safety and a good upbringing until the age of 18, or for so long as s/he remains in education. After that age, parents have no financial or formal responsibility for their children (Socialstyrelsen, 1996, p. 35).

In Italy, by contrast, since 1975, parents are expected to maintain their children for an unlimited time (Del Re). The Polish constitution of 1997 also clearly sets out the duties of parents, including the right of parents to bring up their children according to their own moral and religious convictions. The financial responsibility of parents for their children continues after the age of 18 if they remain in education but only until the age of 24 years (Warzywoda-Kruszyńska and Krzyszkowski).

According to Hungarian Civil Law (Statute 1997/XXXI), parents' obligations and responsibilities include the following: co-operation with their children, respect for their human dignity, providing them with information, helping them to exercise their rights, giving them advice in co-operation with persons and authorities active in providing for the child, encouraging them to learn according to their abilities and avoiding lifestyles that pose a risk to health. The law (Statute 1998/LXXXIV) also specifies the most important obligations of children towards their parents, including the duty to co-operate with their parents or official guardians (Takács).

Obligations of unmarried parents towards children

As the mutual rights and obligations of parents and children are dependent on filiation, as proven by procedures laid down in law, in theory parents may be expected to have the same duties towards their offspring whether or not they are married. In practice, they may not carry out these duties to the same extent as a married couple. In all the EU member and applicant states in the IPROSEC project, unmarried parents have an obligation to maintain their children. In Germany, where the unmarried father has no legal authority, this obligation applied to a lesser extent than for children from wedlock (Ditch *et al.*,

1996, p. 29). In most cases, parental responsibility is not automatic: the father has to be legally recognized in Greece, Ireland, Italy, Spain, the United Kingdom, Estonia, Hungary and Poland; the parents must be living together in France; and in Sweden the father must apply and the mother must consent.

Parental responsibilities after divorce

Governments have intervened to ensure that changes in living arrangements are also reflected in the provision made for the protection of children after divorce. Legislators have, in most cases, given priority to ensuring that the harmful effects of divorce or separation on dependent children and spouses are minimized and that, wherever possible, parents assume joint responsibility for the custody of their children. Although the preference may still be, in most instances, for women to be granted custody after divorce, increasingly joint custody is being promoted as a way of ensuring that men share the day-to-day responsibility for the upbringing of their children.

Sweden was one of the first countries in the EU to introduce joint custody in 1974. It became the general rule in France in 1993 and in Germany in 1998. In Italy, by contrast, only negligible use is made of the provision for shared custody. In Spain, after divorce custody is generally given to the mother, but parental authority remains with both parents, and they must take decisions together about matters such as the child's education or medical treatment in the case of severe illness. In Greece, only one parent can have custody. In Ireland, the mother's agreement is needed for joint custody to be awarded. Since the 1989 Children Act, custody is resolved privately and informally whenever possible in the United Kingdom. In Poland, the courts decide whether to award joint custody or whether to grant custody to one parent, but in practice women are generally given custody, and the rights and obligations of the father are specified (Warzywoda-Kruszyńska and Krzyszkowski).

Maintenance of children after divorce

As divorce rates have climbed, the issue of maintenance payments once marriage has been dissolved has become of critical concern for many governments, particularly in a situation where more complex family structures are ensuing as families reconstitute. Many countries are implementing measures designed to impose a legal obligation on absent fathers to make them provide maintenance for dependent children and their former spouse. Swedish law, which is typical of the situation in most EU countries, states that a child who lives with one of its biological parents should receive maintenance from the other parent. Liable parents repay to the state a sum calculated according to their income and the number of children. The income of the custodial parent is not taken into account. The responsibility of that parent to provide maintenance continues until the child reaches the age of 18 or for so long as he or she is at school. The amount of maintenance depends on an assessment of the combined economic capacity of the parents. Both of them are expected to contribute to the best of their ability (Agell, 1988, p. 26).

Several governments, sometimes amid strong public opposition, not least from bodies supporting fathers, have introduced compulsory recovery of maintenance payments directly from the wage package. In France, for example, the state has put in place a variety of measures designed to oblige the reluctant former partner to pay maintenance, including deductions from

wages and through the tax office. For those parents who have not received maintenance from the former spouse for more than two months, the *Caisses d'allocations familiales* can provide a benefit (*allocation de soutien familial*) and then pursues the debtor. A prison sentence of three years and a fine can also be imposed for non-payment in cases where a deliberate attempt is being made to avoid liability (article 314-7 of the Penal Code) (Pennec).

In the United Kingdom, the role of government is seen as enforcing parental responsibility, sometimes using punitive measures for a defaulting parent, as a means of enabling children to access their rights. The message of compulsory parental responsibility relates mainly to financial commitment. Beyond the level of financial responsibility, however, policy does not clearly define the obligations of parenting, because of political unwillingness to become involved in the 'private domain' (Such).

In Estonia, a parent who lives separately from his or her child has the legal right to visit and communicate with the child, and this right cannot be violated by the other parent. Maintenance may be deducted from an employee's wages without the consent of the employee. After deductions have been made, the employee must still receive at least 80% of the minimum wage rate established by the state. If the former spouse is unable to pay, the lone-parent family becomes eligible to receive social assistance. Although under Soviet rule, the state initiated a search for the absent parent who was defaulting, since transition the state no longer intervenes in the process (Kutsar).

In Hungary, if necessary, the state also intervenes to ensure that absent fathers contribute to the maintenance of their children. If the absent father cannot be traced, the state 'prepays' the alimony for the family members for a maximum of three years (which can be renewed). If the absent parent is finally traced, s/he will have to pay back, with interest, the money advanced by the state. In some cases, the assets of the parent who has fallen into arrears can be confiscated (Statute 1997/XXXI of the Hungarian Civil Law) (Takács).

Under Polish family law, courts decide on the level of maintenance payments, which have to be made by the absent parent until the children reach the age of 18, or 24 if they are still in education. Central government prepays maintenance for parents who default and then pursues them through the courts, resulting in prison sentences for those who persistently refuse to pay (Warzywoda-Kruszyńska and Krzyszkowski).

Obligations in reconstituted families

As yet, family reconstitution following divorce or separation of married or cohabiting couples has received relatively limited attention in public policy debates. The obligations of parents in a second or reconstituted family to children from the first partnerships are only beginning to be critically re-evaluated, for example by the Department of Social Security (1999) in the United Kingdom, in the context of the reform of the Child Support Agency (Such).

In France, following the publication of a number of reports on changes in family law (particularly Théry et Dekeuer-Defossez), the government have been examining the introduction of provisions for step-fathers to take responsibility for raising step-children. Although a literal reading of article 203 of the French Civil Code obliges the step-parent to maintain children produced

within marriage, case law has led to recognition that the same right should be granted to children born out of wedlock. Consideration is being given to the possibility of extending the duty to maintain children beyond the age of majority on a case by case basis (Pennec).

In Sweden, the question of the obligations of parents in second families has important ramifications given the relatively large number of young people who experience life in a reconstituted family (over 6% of all families). As already noted, it is customary for the relationship with children from a former partnership to be formalized through adoption, and for the absent biological parent to continue to provide support for his/her offspring. For these reasons, the arrangement is not interpreted as a problem for society (Jönsson).

Following the breakdown of marriage, as reported in Hungary (Takács), many couples prefer not to formalize a new relationship through remarriage. The legal obligations of step-parents are, therefore, likely to be further complicated, and this is an area where, for the moment, there is an almost total policy vacuum.

Provision of childcare

Childcare is an area where governments have tended to be much more interventionist, although marked differences in approach with regard to funding mechanisms and the level and standard of provision can be found between countries.

France is an example of a country where childcare is seen very much as a shared responsibility between the public and the private sector and families themselves. Public provision is relatively well developed compared to most other EU member states, and is strongly supported by political parties and family associations. Additional investment and provision were agreed following the Family Conference held in June 2000, with a view to improving further the arrangements for combining paid work and family life (Pennec).

Swedish public provision of childcare has expanded rapidly since the 1960s, and particularly in the 1990s, making it one of the countries with the highest level of public provision and support. Since 1995, all municipalities are obliged to offer pre-school activities and childcare facilities to children of parents who are working or studying, or if the child is considered to have special needs. In response to the large number of births during the 1990s, the number of places was increased significantly, although it did not keep pace with the demand. Under new measures that have been agreed, fixed charges are being introduced for public childcare in 2002, and free pre-school attendance will be available for all 4–5 year olds in 2003 (Jönsson).

By contrast, Britain is a country where childcare has remained relatively underdeveloped. The Blair government presented childcare provision as key to giving mothers, in particular, the opportunity for paid employment and as part of the strategy for reconciling work and home. The National Childcare Strategy suggests that government is committed to ensuring families have access to good quality provision. Childcare is now viewed not only as the responsibility of the public sector, but also as a personal and/or private sector responsibility. The benefits of provision are shown to be tangible for children, parents and business. Childcare can be seen as an issue that is supported in principle, as long as it does not adversely affect the United Kingdom's relatively low-cost, low-tax, unregulated labour market (Bagilhole and Byrne, 2000). Transferring

some of the cost of childcare to the private sector requires provision to be placed in the context of the benefits this offers to business, with staff retention and quality being promoted as two main advantages (Such).

In the applicant states, during the Soviet era childcare was provided by the state as a matter of course to cater for the high labour force participation rates of women. In Hungary, childcare continues to be seen as an area for public policy. However, during the 1990s, initiatives were introduced to promote private arrangements. In 1995 2.54% of GDP was spent by the state under the family budget head, including not only family allowances and maternity grants and benefits, but also childcare allowances and funds to cover the cost of childcare and family allowances. In 1998, the amount was reduced to 1.65% of GDP. The state is obliged to provide children aged 3–16 with childcare and educational facilities (kindergartens and schools). The care of children below the age of three is the responsibility of their parents. The earliest years of life of a new family member are, therefore, associated with the greatest upheaval for the family, and a higher level of state support would be appreciated during this period.

Nurseries play an important role in this respect, but their number fell from 755 in 1970 to 530 in 1998. In the 1970s a large number of enterprises had their own nurseries, but due to socio-economic changes and the closure of factories, the number of workplace nurseries fell dramatically, from 289 in 1970 to only 19 in 1998. Private provision is thus becoming more widespread, and NGOs are playing an increasingly important role, for example in the areas of child protection, where the number of NGOs increased from 518 in 1995 to 689 in 1998, and for family protection, where it increased from 343 in 1995 to 414 in 1998 (Takács).

In both Estonia and Poland, public childcare provision declined during the 1990s, as government subsidies were withdrawn. In Poland, kindergartens maintained by local authorities were closed due to lack of funds. Families are now expected to make their own arrangements. High unemployment among women, in combination with charges for services, also brought about a fall in the demand for places. Private provision became widespread, particularly in the big cities (Warzywoda-Kruszyńska and Krzyszkowski).

Caring for older parents

Obligations and responsibilities between parents and children operate in two directions. Adult children also have rights and duties towards their own parents, although the extent to which these obligations are imposed by law varies considerably from one country to another within the EU (Millar and Warman, 1996).

The Mediterranean member states can be characterized by the legal obligations that exist between family members. The obligations of kin are most extensive in Italy and include in-laws and half sibling, who must provide support in proportion to income. In Spain, family members can be taken to court or excluded from inheritance if they fail to comply.

The civil codes in France and Germany formally give adult children maintenance responsibilities towards their parents. In Germany, adult children are defined as 'liable relatives', and they can be asked to pay for the care of parents. The state can also reclaim social assistance benefits from adult children for their parents, and in France against inheritance after a claimant's

death. In Germany, adult children, in theory, have financial obligations to pay for the care needs of their parents, but individuals in employment are now required to take out care insurance (*Pflege-versicherung*), so that they can pay for their own care.

In France, attitudes are changing, and the state is increasingly demonstrating that it considers itself to have a responsibility to ensure that older people are able to exercise their right to remain autonomous in line with the equality principle. Questions have been raised about whether the financial obligation on a son or daughter-in-law towards a father or mother-in-law until the death of the spouse should be upheld, and whether a step-child should be required to maintain a step-parent (Pennec).

In the United Kingdom and Ireland, family members have no formal, legal obligations to provide or pay for the care of older people or disabled adults. Nor are the responsibilities of the state clearly defined in law. In the Nordic states, at the other extreme, adult children have no legal financial or other responsibility towards their parents and relatives, and public opinion supports the principle that society should provide these types of services.

The obligations of the state and of municipalities to adults with care needs are made explicit, and support is directed towards the individual. In practice, the costs of domiciliary care, or even long-term care, that cannot be met by an individual, will be paid for through central government and local authority schemes. In spite of the fact that grown children have no responsibility towards their parents and relatives, it is clear that the care provided in the home is absolutely necessary. Without the assistance of relatives, care services for older and disabled people would not function. It is also known that many relatives feel they are under physical, psychological and social strain (Jönsson). The situation is problematic for both parties: the care-givers may feel obliged to assist relatives, regardless of whether they are able or want to do so, and the care-receivers may not want to be dependent on someone whom they know or are related to (Wallberg *et al.*, 1994, p. 7).

In the applicant states adult children are under a legal obligation to maintain their parents. In Poland for example, adult children have a legal responsibility towards their parents if they are in need of financial support (Warzywoda-Kruszyńska and Krzyszkowski). Under the Family Law Act (§ 45) and also the Child Protection Act (§ 18), Estonian law obliges adult children to support and maintain their ageing parents, whether or not the parents were married. The law regulates the reciprocal duties of children toward their parents and family; children must honour their parents and persons who contribute to their upbringing; they must also assist their parents, grandparents, siblings and persons responsible for their upbringing when they are in need (Kutsar).

In Hungary, relatives have a duty to support family members in need. The law specifies who these relatives are: parents, adult children or older siblings. Single or widowed persons who are not able to support themselves, especially those unable to work, must be supported by their relatives. Adult children have to contribute to the maintenance of their parents when they are in need. However, the law does not prescribe any specific arrangements; they are left to jurisprudence (Statute 1952/IV of the Hungarian Civil Law, Chapter VII). During the 1990s, NGOs were becoming increasingly active in supporting the elderly: almost 370 organizations were involved in 1998 (Central Statistical Office, 2000) (Takács).

In all countries, provision for older people is organized at local level, but the extent to which it is regulated varies from one situation to another. In Germany, Ireland, Italy, Spain and the United Kingdom, few national regulations apply. In France and Sweden, services are subject to national regulation but implemented at local level. Public provision in Greece, Ireland, Italy and Spain remains very limited. In Spain it is, nonetheless, regulated by the state (Valiente). Increasingly, services are being contracted out to the private sector and to voluntary organizations, thereby introducing a further source of variation in the level of provision.

Characterizing family policy in EU member and applicant states

A distinction has often been made between countries with explicit and implicit family policies. In the 1970s, of the countries examined in the IPROSEC project, France, Sweden, and Hungary were identified as exemplars of explicit family policies, while Germany and Poland were described as having a tradition of explicit but more narrowly focused family policy (Kammerman and Kahn, 1978). Explicit family policies can be characterized as being far-reaching, coherent and legitimated, in line with the definition presented at the beginning of this paper. The United Kingdom, by contrast, has often served as an example of an EU member state with an implicit, or even negative, family policy, in the sense that governments have rejected the idea that they should take on responsibility for family matters as a policy domain. In the early 1990s, British family policy could be described as 'undeveloped' (Chester, 1994, p. 274).

Among the countries said to pursue explicit family policies in the 1970s, France has consistently promoted its family policy, and governments do not hesitate to advocate policies overtly aimed at supporting the family as a fundamental social unit. Although Sweden might justifiably have been described as having an explicit family policy from the 1950s to 1970s, the expressed aims and objectives of Swedish governments have since become less family focused. Governments have sought to promote more individualistic values, but with attention to the interests of children. Another priority has been to promote gender equality by involving fathers in parenting and by extending provision for childcare and leave arrangements to enable both women and men to combine parenthood and employment (Bergqvist and Jungar, 2000). Gender has been mainstreamed, and policy is aimed at increasing uptake by men of parental insurance and of joint custody of children, and at encouraging more men to work in caring and educational occupations. A proposal under discussion in 2000 was designed to make child benefit payable to both parents rather than to the mother. The goal of enabling older people to remain independent in their own homes has, similarly, emphasized the relationship between the state and the individual, although the contribution made by family members to the wellbeing of their relatives is considerable (Jönsson).

Present-day Hungary can also be said to have continued to pursue an explicit family policy, and the normative definition of the family has changed relatively little since the 1970s. The concept of family policy thus extends to terms such as tradition, culture, education, youth movements, sport, information (provided by the media), the legal system, housing, social and childcare provision, physical and mental health care and the involvement of

NGOs (Szociális és Családügyi Minisztérium, 2000, p. 13). Despite its pervasiveness, such a definition is not considered broad enough, however, to cover the range of living arrangements that apply today. Critics point out that social policy in Hungary seems to have been reduced to a kind of traditionally interpreted family policy, and that social and political intervention will not necessarily lead to 'advantageous demographic processes', as governmental policy guidelines are not omnipotent sources of influence on people's decision whether or not to have a family or children (Kiss, 1999).

In addition, state intervention has been targeted traditionally at women, while the involvement of men with family issues has remained very limited. Consequently, it is women who have mainly suffered from the adverse affects of policies. They have developed psychological problems as a result of feeling enclosed within the home, and they have experienced discrimination in the labour market. Their greatest challenge has been how to harmonize family with work, and for this they need state support (Takács).

Of the two countries described as having a more narrowly focused family policy, Germany explicitly recognizes the legitimacy of state involvement in family affairs, though the main object of policy continues to be the conjugal relationship rather than the family as a unit, for example for purposes of taxation.

During the 1990s, governments in Poland, the other country described as having a more narrowly focused family policy, maintained the traditional support for family values in their rhetoric. Among the measures introduced were policies designed to stop population decline, such as restrictive law on abortion and the removal of subsidies on contraceptives, which governments in most EU member states would be reluctant to promulgate. The institution of legal separation in Poland can be seen as an alternative to divorce that does not entail a complete break with the spouse. Cuts in social spending and targeting of child benefits contribute further to a picture of a state forced by financial imperatives to translate its 'support for family values' in a restrictive sense (Warzywoda-Kruszyńska and Krzyszkowski).

The approach to family matters evolved among British politicians during the 1990s, becoming more explicit, at least in the rhetoric. Firstly, under the Conservative government emphasis was placed on getting 'back to basics'; and then the Labour government made pronouncements about the need to support families. Although the rhetoric remains stronger than the practice, the family has become a much more acceptable area for political intervention (Such).

As indicated in this paper, the situation regarding the intervention of governments in family matters has also been changing in the Mediterranean member states and in Ireland. While the family is constitutionally under the protection of the state and, in the case of Greece, Italy and Spain, the state imposes mutual obligations on family members, they are expected to manage their affairs with only limited financial support from central government. The situation in Ireland remains ambivalent (see also FitzGerald in the second issue in this series of papers). The constitution lays down the duty of the state to protect the family as established by marriage, but at the same time it must respect the private nature of family life. In addition, attempts to reform divorce and abortion law have met with strong opposition on religious grounds. The role of women as homemakers is supported not only by the constitution but also by

the Catholic Church. Nonetheless, Irish women have been able to exploit EU law to make progress towards greater gender equity.

The third of the applicant states, Estonia, lacks a coherent, supportive family policy. The welfare mix that developed during the 1990s has fluctuated between targeting the family as a unit and supporting individuals in need. As shown in this paper, the legal framework is very explicit in regulating family obligations and duties, but, as in the other candidate countries and several of the EU member states, financial pressures are limiting the amount of support that governments can provide for families as units. The examples examined in this issue of papers provide further confirmation of one of the central tenets in the IPROSEC project that a complex mix of factors determines the way in which family policy is conceptualized not only within countries over time but also between countries.

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