

Cross-National Research Papers

Sixth Series:

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

2. Spatio-Temporal Dimensions of Economic and Social Change in Europe

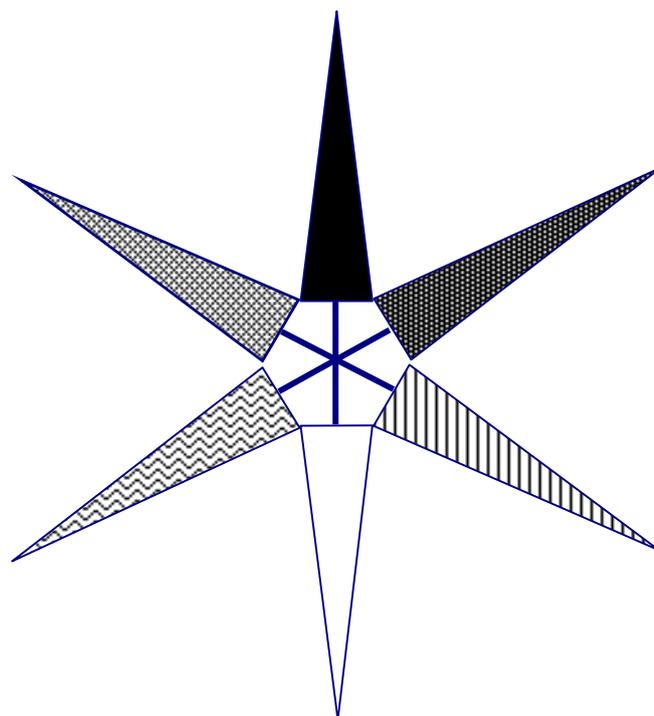
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Series Editor's Foreword

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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Introduction

Louise Appleton

This issue of *Cross-National Research Papers* addresses key questions for policy analysts. What are the issues raised in cross-national comparisons by spatial and temporal dimensions? How do space and time help us to understand social and economic change? What impact does this understanding have on the way policy is, or may be, shaped?

The socio-demographic changes taking place across the European Union since the 1960s have created situations requiring policy responses: population decline and ageing, the development of alternative family forms, changing gender and intergenerational relationships. While economic and socio-demographic trends have generally been in the same direction across the EU, important differences and variations can be observed in the rate and pace of change between and within member states. Because of the various factors bringing about change, it has a differential impact for particular population groups. Spatial variations may be a consequence of political, economic, geographical or cultural diversity, or a combination of these factors. In addition, political, economic and cultural conditions are not static but are in a constant state of flux. Time and temporal dynamics are thus an important factor in understanding socio-demographic change.

Observations of spatial and temporal variation in socio-demographic trends highlight the conceptual, methodological and practical difficulties of implementing common policies in countries at different stages of development and with different political and economic systems and socio-cultural expectations. The impact of spatio-temporal factors can also be usefully taken into account in assessing policy outputs. An appreciation of spatio-temporal dimensions of change is important for policy actors since variations in trends across space and time demand different policy responses. Policy actors need to take account of longer-term issues as well as reacting to short-term fluctuations.

The aim of this collection of papers is to highlight the spatio-temporal differences both within and between nations, the problems they pose for cross-national research teams, and for policy formulation and implementation. The volume reports on the experiences of the countries covered by the IPROSEC project under Framework Programme 5, covering eight EU member states (France, Germany, Greece, Ireland, Italy, Spain, Sweden and the United Kingdom) and three applicant states (Estonia, Hungary and Poland), representing different waves of EU membership.

The papers are concerned with the spatio-temporal dimensions of economic and social change. Chapter one considers general questions associated with spatio-temporal diversity for researchers engaged in cross-national comparative research. It provides an overview of the theoretical and methodological issues associated with spatio-temporal dimensions of socio-demographic change. It starts from the premise that all nations are inherently complex, with different social, political, economic and cultural systems operating across different topographies. Drawing on examples from the IPROSEC project, it examines problems of data collection: conceptual

problems, the tension between the nation state and cultural groups, gender, ethnicity, language, class and age, the selection of time periods, and the geographical diversity of the states chosen for comparison. It also looks at the potential implications of this complexity for a research team composed of individuals from different national, disciplinary and cultural backgrounds. It concludes that, while some measures can be taken to reduce theoretical and methodological problems that arise from spatio-temporal differences in socio-demographic change, policy actors must at least be aware of these variations when seeking to implement supranational and national level policies and when evaluating their success.

The remainder of the collection is devoted to thematic case studies. The authors discuss the challenges that spatio-temporal dimensions of socio-demographic change pose in certain contexts. The case studies refer to different geographical scales, covering national, regional, urban, and local levels, and different historical periods, from the 1970s to the late 1990s depending on the events shaping the countries involved. They highlight subnational differences across space and time, and examine the implications of such diversity for formulating and implementing policies at both national and EU level. Themes such as ethnicity, gender, and religion are manifest throughout these debates, demonstrating the complex mosaic of culture between and within the countries involved in the IPROSEC project. This framework provides an opportunity to explore the subnational variation in particular countries that is often not possible in comparisons of nation states. The papers are arranged by their geographical level of enquiry, starting with discussion of continental scale, through the national and regional levels to subnational diversity and the local level.

In Chapter 2, Alec Hargreaves concentrates on continental scale ethnic diversity and its implications for understanding socio-demographic trends, and for formulating and implementing policies. Drawing on examples from across the EU, and focusing in particular on France and the United Kingdom, he argues that ethnicity is a significant factor in understanding the complexities of socio-demographic change. He highlights the difficulties of trying to operationalize ethnic categories in the service of social policy.

Chapter 3 is also interested in continental scale differences, but this paper by Tess Kay is concerned with gender differentiation in employment patterns. Drawing attention to European level data, Kay demonstrates the variations in employment patterns among women and men, with particular reference to levels of education.

The continental scale is also the scope of the paper by Dagmar Kutsar and Ene-Margit Tiit. They consider the problems inherent in comparative analysis of socio-demographic indicators between developed countries and countries in transition, and demonstrate their thesis using the example of Estonia. In addition to between-country complexities, their paper illustrates the problems of comparability over time within transition countries because of the changes that have taken place since independence.

The following two chapters are concerned with regional diversity in Germany and Italy. The focus of the first of the two papers, by Dieter Eißel and Jeremy Leaman, is the issue of the two Germanies (East and West), and the impact of economic, political and social upheaval associated with unification based on the federal system. The authors demonstrate how regional variation

exists between the former Federal Republic of Germany and German Democratic Republic, and how the federalist system does little to ease the rift because of the income disparities between *Länder* in East and West. The second of the two papers, by Devi Sacchetto, considers the north/south division in Italy in terms of economic, social, cultural and political factors, and the effect it has on national demographic trends. The author discusses the implications of these differences for collecting and analysing national statistical data, and formulating and implementing policy.

Chapter 7 draws on the theme of ethnicity developed in Chapter 2, but while Hargreaves is concerned with ethnic diversity across nations, the paper focuses on within-nation ethnic diversity. It considers the Gypsy and non-Gypsy populations in Hungary. More specifically, the paper highlights the problems of defining and measuring the Roma presence in Hungary in the 1990s, and compares how the question of the Gypsies has been addressed both in the Communist period and during transition. It uses demographic indicators, including family formation and structure, life expectancy, employment patterns, education, social exclusion versus integration, rural versus urban differentiation and housing, to demonstrate the diversity between Roma and Hungarians.

The theme of rural versus urban differences is developed in the paper by Wielislawa Warzywoda-Kruszynska and Jerzy Krzyzkowski on Poland. In Chapter 8, the authors discuss the problems of declining fertility rates and increasing population ageing from both a spatial and a temporal perspective in Poland. The authors argue that, since the transition, these socio-demographic trends have intensified, but with the high unemployment rates that have accompanied transition, the problems have become more acute in rural areas. The final paper by Maurice Fitzgerald examines the implications for social life of the phenomenal economic growth that has taken place in Ireland since it joined the EU. The author discusses the economic and socio-demographic changes that have occurred and analyses their effect on population growth and ageing, family formation, and gender relations. He argues that the benefits of economic growth have not been evenly distributed between rural and urban areas, social categories and women and men, and suggests that the changes have created important challenges for policy formulation as well as for implementation.

1. Spatio-Temporal Dimensions of Change and Policy Implications across Europe

Louise Appleton

In a context where European Commission funding for multi-national research programmes is encouraging cross-national research, the importance of understanding spatial and temporal dimensions of demographic change is becoming increasingly significant for policy analysts. The purpose of this paper is to demonstrate how spatio-temporal dimensions of socio-demographic change in the European Union member and applicant states involved in the IPROSEC project can enhance our understanding of demography and can assist policy actors in making more effective policy decisions.

The paper argues that space and time are collective concerns for researchers attempting to understand socio-demographic change and should be considered in tandem rather than separately. It begins with a section on the theoretical issues arising in cross-national comparative research, including the spatial and temporal variations associated with the category of the nation. The subsequent section considers methodological issues. Firstly, it looks at problems relating to data collection and analysis, covering conceptual problems, issues of aggregation, integrity of data sets, and changes in data collection methods both across space and time. Secondly, it examines the spatio-temporal positionalities of researchers. The paper concludes with recommendation on how policy actors could best utilize a spatio-temporal perspective to make policy implementation more effective.

Theoretical issues

This section of the paper considers theoretical concerns associated with the spatio-temporal dimensions of socio-demographic change and their relevance to the IPROSEC study. It focuses on the category of the nation as a social construction that varies across space and time.

THE SPATIAL CATEGORY OF THE NATION

Cross-national comparative research presupposes the existence of a unit of analysis that can be described as 'the nation'. Nations are defined as political constructs synonymous with the nation state. They are also territories delineated by internationally recognized (if sometimes fiercely disputed) borders. Nations can be considered as the artefacts of people's convictions, or ideological creations of a category of the population who express affiliation to a cultural group and its homeland. Researchers interested in national demographics are concerned with all these dimensions of the nation: its people, their affiliation with the geographical homeland, and the limits of jurisdiction of the national government.¹

Nations, however, rarely fit neatly defined categories that can be directly compared like with like because the political, geographical and cultural components that define them shift over time and space. Politically, nations vary in their organization, for example, with the United Kingdom devolving power to

England, Ireland, Scotland and Wales, and Germany operating a federal system. The former East European countries included in the project – Estonia, Hungary and Poland – remain closer to a centralized bureaucracy. International political relations, covering ties with former imperial powers or dependencies, also influence policy formation and contribute to political variation between nations.

Geographically, nations differ in size, as well as shape and form. The territory of France for example is the largest of the IPROSEC countries and covers 543 965 km², while that of the United Kingdom is less than half the size of France, covering 241 751 km², but supports the same population size (CIA, 2000). Nations vary in topography, with a country such as Greece being composed of a mainland and multiple islands in the Aegean Sea, while Spain is a country whose landscape is characterized by the interspersing of mountain ranges (Pyrenees, Cantabrian Mountains, Cordillera Central, and the Catalana Coastal Range) and plains. This varied topography affects both the density and distribution of population groups between EU member and applicant states (see Chapter 6 on Italy by Sacchetto in the present volume).

Nations differ culturally as exemplified by the prevalence of one (or more) religion, ethnic group, language, practices and customs that contribute to a national culture. Thus, despite the fact that the defining characteristics of nations are the same, their political, geographical and cultural fabric is such that they do not constitute coherent units of observation.

References to the category of the nation assume that a certain degree of homogeneity can be identified. However, as Richard Rose (1987, p. 3) argues, in cross-national comparative research into public policy, researchers ignore the 'many ways in which a nation can be differentiated internally'. Local and regional administrative structures may differ considerably from those at national level, as Dieter Eißel and Jeremy Leaman argue in this volume. Geographically, the territory of the nation is immensely diverse, influencing the way in which natural resources and the economy have developed.

In demographic studies, it is primarily the socio-cultural diversity that is the key concern of the cross-national researcher. Culturally, population groups are immensely diverse and do not conform to a 'national type'. Instead, national populations are made up of groups of individuals characterized by differences in gender, age, race, ethnicity, occupation, economic status, religion, and educational background. This is not to suggest that national cultures do not exist, but to state that, while there is evidence of group cohesion, often division can be found just below the surface. Furthermore, that division has a spatial pattern. Population clusters may be identified in regions, metropolitan areas, and neighbourhoods, which in turn require different responses from policy actors at different levels of governance. For researchers and policy actors attempting to understand within-nation diversity, 'intranational cultural differences related to region, class, or pattern of thought may be a source of much antagonism' (Berting, 1987, p. 12, footnote 1).

Easing this antagonism does not mean wholesale rejection of the nation as a unit of analysis, but rather requires taking the nation as the starting point and understanding its heterogeneity. When considering national trends, it is necessary for the cross-national comparative researcher to take account of subnational variation to avoid exclusion of important but marginalized groups. This might involve including culturally specific subnational groups in interviews

or in data analysis. Sometimes, however, the existence of a range of subgroups prevents full incorporation into the research process at a subnational level.

In the IPROSEC project, the response to this problem has been to explore subnational complexities in small-scale case studies, exemplified in this collection of papers. National representatives who are aware of the variation within their countries have written these case studies. They discuss the subnational details of the demographic situation, which would not be adequately understood from a cross-national research methodology concerned largely with national units. The case study approach makes it possible to highlight subnational differences, in particular the socio-cultural diversity of national groups, and to contemplate the implications of such diversity for formulating and implementing policy.

THE DYNAMIC NATURE OF NATIONS

A further theoretical consideration in cross-national comparative research is associated with the dynamic nature of nations. Eric Hobsbawm and Terence Ranger (1992) demonstrate the temporality of nations in their work on nationalism. They argue that the first nations have specific socio-historical locations, emerging during modernity with the development of the world system, and would not have been recognizable as nations before the eighteenth century. Their later studies of the constant invention and reinvention of nations through nationalist symbolism over the past 200 years show how nations change over time.

Changes such as these can take place gradually and over a long period of time, with few alterations in borders, administration and law for many years. In other cases, events such as war, national disasters or political change in governance can have dramatic and rapid effects. The degree of change between countries is varying, posing further challenges to cross-national comparative research and supranational policy actors.

Change also impacts upon different parts of nations to varying degrees. This can be usefully demonstrated through the example of one of the countries in the IPROSEC project, Estonia. Independence in 1991 ushered in marked changes in the political, economic and social life of Estonians, but these changes are most obvious in large cities such as Tallinn and Tartu. In smaller, more rural areas, particularly those occupied largely by Russian peasants in the region of Ida-Viru, the rate and intensity of change has been less marked (Euroinformer, 1999). The time lag between events and their impact upon different regions varies, and for policy actors reacting to events and the associated socio-demographic trends, this is an important consideration.

Due to the irregularity and internal heterogeneity of nations, the cross-national comparative researcher must be aware of both space and time as key variables in the research process. Understanding space and time enables the choice of nations (and subnational representative individuals) to be theoretically justified.

Because of the concern with the interaction between policy and socio-demographic change, in the IPROSEC project nations were chosen primarily because of their political association with the EU. While all the countries selected are member or applicant states, the length of time they have been

associated with the EU varies considerably from founder members (France, Germany and Italy) in the late 1950s through to recent applicants (Estonia, Hungary and Poland) in the 1990s. The intention in making this selection of particular countries was to capture changes associated with different waves of membership.

Furthermore, understanding the spatial and temporal contexts of these member and applicant states contributes to an understanding of why variation exists both between and within countries, in terms of both socio-demographic change and the relationship between that change and policy.

Methodological issues

The previous section has demonstrated that nations are complex categories whose meanings shift in space and time. It has also shown how their complexity renders problematic cross-national comparative research that treats the nation as a homogeneous unit. However, despite the category complexities, nations are often useful units of analysis in comparative research not least because of the availability of harmonized data collected by national and international statistical agencies. As Else Øyen has argued:

The use of countries as units in comparative research may not be the most fruitful approach. However, the world is divided according to these administrative units, and since much of the infrastructure available for comparative research is tied to the territories enclosed by national boundaries, it becomes seductively convincing to use such units in comparative research. (Øyen, 1990, p. 2)

The provision of such material emanating from the growing number of national and international bodies concerned with collating statistical data reinforces the appeal of cross-national comparative research. Indeed, it is to these agencies that researchers attribute the growth in this type of research (Lane, 1990; Scheuch, 1990; Teune, 1990; Fredrickson, 1997). Yet, it is the very seductiveness of data, and the ease with which they are obtained and employed in research projects, that must alert practitioners to some of their limitations. This section of the paper outlines some of the methodological issues associated with data from a spatial and temporal perspective.

CONCEPTUALIZING CHANGE OVER SPACE

The first issue associated with data collection is the conceptual differences both between and within nations in collating information on socio-demographic change. It might be expected that international organizations responsible for data collection have used categories that are understood by all parties involved. However, no category is universal. In *Cross-National Research Papers*, 5 (1), Linda Hantrais has argued that 'despite the efforts made by Eurostat to standardise data collection and harmonise analytical tools at EU level, cross-national comparisons are often unreliable due to differences in national definitions' (Hantrais, 1999, p. 1). What one nation may understand from a term may be completely different from the understanding in a different national context, particularly where meaning is lost in translation between different languages.

Conceptual problems are not just a question of differences in language lost during translation, but of understanding the cultural differences associated

with different terms and expressions and their meanings (see the first issue in this series of *Cross-National Research Papers*). Analysis of the different meanings attributed to certain terms and expressions, and of the concepts underlying them, shows that the same thing is not being compared in different countries.

For example, the term 'distribution of household labour' is found to be conceptualized differently in the applicant countries compared to most EU member states. Although the distribution of household labour is identified by gender role differentiation within families in both cases, and women continue to perform most of the unpaid work in the home, the status attached to the roles differs. In West European societies where increasing numbers of women have been entering and remaining in the labour market, often on a full-time basis, the tasks carried out by women in the home are considered to be of lower status than paid work outside the home. Even when women are economically active, they generally continue to have the main responsibility for both housework and childcare, and they are also more likely than men to care for ageing relatives. It is not unusual for women to do less overtime than men and to interrupt their occupational careers when they have young children.

In contrast, in societies in 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 personal identity. Household labour, while conducted overwhelmingly by women, therefore has a higher status in these countries compared to the EU.

In Hungary, for example, the economic activity rate for women has always been high because under socialism women were expected to work full time outside the home (see the first issue of this series of *Cross-National Research Papers*). However, the figure for economic activity included women staying at home temporarily to look after small children ('inactive employees'), which meant that mothers were effectively paid to stay at home. Paid work and motherhood were given equal status, particularly with the introduction of a childcare allowance in 1967. Since transition, the economic activity rates for women have declined in all age groups, except the 55–59 age band. The most significant decline in economic activity rates has been among the 30–34 age group (from 78.9% in 1990 to 67.0% in 1998) and the 35–39 age group (from 86.4% in 1990 to 74.3% in 1998) (ILO, 1999, tables 1, 1a).

Women are thus playing an even greater role in household labour, including child and elder care. Motherhood continues to be strongly supported by both the state (with a hidden goal to make the risk of women's unemployment invisible) and family members, particularly since household work became a symbol of women's independence after the transition. As in the EU member states, time-budget studies show that not only mothers who stay at home with small children but also women in the labour market have the main responsibility for housework, childcare and care for ageing relatives. However, the status of this domestic work remains higher than in the EU.

When using large datasets, particularly those produced by international organizations, it is important to be aware of conceptual issues. One solution is to compare the categories used in drawing up data at national level. Where differences emerge in what appear to be identical categories, it is important to identify why these differences exist and whether they are due to conceptual problems.

This method has been adopted in the IPROSEC project. While the main data have been collated from Eurostat and European Community Household Panel surveys, partners have also referred to national datasets for comparative purposes. Where differences between data are found, national definitions have been checked to try to understand whether conceptual problems are the cause of the dissonance. National data have not been used as a substitute for, but rather an accompaniment to, supranational data, since both have their limitations as well as offering a number of advantages for the cross-national researcher.

CONCEPTUALIZING CHANGE OVER TIME

Concepts may also differ over time, as can be illustrated through the choice of categories made by Eurostat to tabulate employment rates for men and women. In the Eurostat data for example, the Labour Force Survey in 2000 tabulated employment rates for men and women differently from previous editions. In earlier editions of the publication, age groups included a category 14/15–19, but in the 2000 edition the age group 15–24 replaced this category. Comparing this grouping over time using the publication will, therefore, be difficult without access to more detailed data on individual age groups that would have to be obtained from Eurostat. Furthermore, the relevance of this age grouping is now questionable and increasingly problematic. Fewer young people leave education before the age of 18, and hence the bottom end of this category is less relevant for assessing the changing needs of the young population. It seems likely that the age group could change again in future datasets, perpetuating the problem of comparative research over time.

In some countries, particularly those in Eastern Europe that have recently gained independence and are applying for EU membership, marked changes can be found in data collection procedures that render historical comparison difficult. Since independence, countries such as Estonia, Hungary and Poland have been responsible for their own data collection, and changes have been made to bring these procedures into line with the European practice of census survey techniques. Researchers comparing these national statistics over time thus face problems of data uniformity because of changes in data collection procedures and categories (see the chapter by Kutsar and Tiit in this volume).

Identifying equivalence or comparability of samples across space and time can only be understood with in-depth knowledge of the different cultures being studied and their languages. For this reason, Ralph Turner (1990) recommends the provision of a national (which could include subnational) validation panel to give their opinion on the meaning of certain expressions when used in different contexts. The first issue in this series of *Cross-National Research Papers* illustrates the findings of the international validation panel employed in the IPROSEC project to clarify meanings of terms and expressions.

AGGREGATE FIGURES IN SPACE AND TIME

National and international datasets share the problem associated with aggregating statistics. In international datasets for example, figures are aggregated to provide a 'typical' pattern for a nation, but they are unable to provide a picture of the spatial variation within nations discussed in the opening

section of the paper. The major differences in population density across Europe demonstrate this variation. The United Kingdom, the most densely populated country in the EU after the Netherlands, had 244 inhabitants per km² in 1999, while the figure in Sweden was 21.5. Yet within these nations huge variation exists. In the UK, for example, the population density of Birmingham is 2933 inhabitants per km², and London's equivalent figure is 4441. In Cumbria, however, the population density for the county is 70 inhabitants per km² (Cumbria County Council, 2000; Eurostat, 2000). László Cseh-Szombathy (1985) has argued that, despite the seductiveness of international databases, their inability to provide indicators of the dispersion of the values in the countries concerned renders their use limited. Thus, he concluded: 'there is no other solution than to organise a special collection of data in the countries concerned' (Cseh-Szombathy, 1985, p. 56). The needs of researchers may now be satisfied by Eurostat since it is possible to gain access to disaggregated datasets from Eurostat and national data bureaux.

Such datasets enable researchers to identify the spatial distribution of different statistical variables, and highlight certain areas that require special attention from policy actors. The level of detail required for meaningful comparisons, however, varies between nations. In Italy, for example, demographic variation is found at the regional scale between north and south, largely because the north is more industrialized and the south is more agricultural. Policy actors, therefore, need to pay attention to the north/south divide in Italy.

In Greece, marked variation in demographic trends can be identified between rural and urban areas. Given the large proportion of rural residents (41% of the total population) (Eurostat, 2000), this is an important distinction for policy actors. For example, unemployment in rural areas is 6.4% and in urban areas is more than double this figure at 13.7%. Furthermore, variation exists between different population subgroups according to age, ethnicity or gender, found in spatial clusters at a variety of different scales. Differences in gender are significant in Greece. Although urban areas have an average unemployment rate of 13.7%, the unemployment rate of women is much higher than that of men (19% compared with 8.3%), while in the rural areas the difference is less marked (4.9% for men, and 7.9% for women) (Baldwin-Edwards and Safilios-Rothschild, 2000, p. 206).

National data do not necessarily reveal the subtle differences between ethnic groups because they are aggregated for the country as a whole. Ethnicity is an important factor affecting unemployment rates in Greece, for example. The rates of unemployment are consistently two to three times higher for immigrants than for indigenous Greeks. Since immigrants are concentrated in urban areas, such as Athens, this helps to account, in part, for the higher unemployment rates in urban areas. Thus, without understanding the complex ethnic make-up of the country, responding to the problems of unemployment in urban and rural areas would be difficult.

However, even if access to this level of detail of information is available, the question facing researchers is where to draw the line on the level of detail. When does the detail become so fine that it fails to be of any use to policy actors attempting to formulate and implement national and supranational level policies? Etzioni-Halevy discusses this issue in her comparative work on Hungary and Britain:

If ... the systems are sliced into at a lower level of generality, closer to the micro-level, then the problem arises of whether the micro in fact represents the macro, or whether observing something narrower within a broader system in fact tells us anything significant about the system as a whole. (Etzioni-Halevy, 1990, pp. 119–20).

Research on Germany illustrates this issue, and the paper in this collection by Eißel and Leaman presents the complexities facing the German research team on the IPROSEC project. They argue that, when investigating socio-demographic change in Germany, the nation's internal dynamics are so complex that a national picture of the situation is difficult to obtain. From a socio-demographic perspective, Eißel and Leaman identify variation between the two Germanies of East and West, between regions or *Länder*, between ethnic groups (particularly the Turkish immigrants), and religious groups. How to obtain a fully representative sample of this diversity is particularly problematic when faced with limits on resources and time.

The aggregation of data is problematic over time as well as space. Usually, data are provided for a particular year, but the annual figure could be the aggregate for that year based on data collected at more frequent intervals, such as for unemployment rates taken monthly. Or data may refer to the situation found at one point during a given year, even though the situation varies throughout the year (such as for members of a household). The Labour Force Survey, for example, publishes annual data, but it provides a snapshot of all countries in spring and early summer rather than throughout the whole year.

In the IPROSEC project, data are examined for five-yearly intervals in most cases, but are based on figures provided by Eurostat for the year in question. This means that fluctuations within and between years are not recorded. In some cases, shorter time periods might be more effective to illustrate socio-demographic change, particularly when it has been rapid, such as after independence (in transition countries), or after major political events, such as the fall of the Berlin Wall and its impact on Germany.²

Shorter time frames might also be more appropriate when policy implementation will produce more immediate changes. The legalization of abortion, for example, may mean that data on abortion rates need to be considered more frequently in the initial period after legalization rather than at five yearly intervals. Over time, the frequency with which such data need to be analysed could be reduced. In other cases, it might be more appropriate to take a longer time frame. Fluctuations in life expectancy, for example, generally vary little from year to year for the IPROSEC countries because of their late stage in demographic development.

Life expectancy variations, however, enable policy actors to make predictions about the size and shape of the population, and hence their policy needs in the long term. Population ageing, currently a major concern of all EU member states, has been detected in demographic trends for some time, and is likely to become more problematic in the future. Drawing on these data and predictions for the next half century, policy actors are currently formulating and implementing policies designed to have long-term effects to meet the policy needs of a population group that will be reaching retirement age in 15 or 20 years time. Time and timing are therefore central to an understanding of socio-demographic change and its policy implications when based on aggregated data.

INTEGRITY OF DATA

Before the collapse of the Soviet Union, Michael Lesage (1987) contended that, in cross-national comparative research associated with East European countries, problems arise with regard to the integrity of data for two reasons. Firstly, access to information, particularly from the pre-Glasnost era, was restricted to key personnel. Information was sometimes available in published books, but he suggests that it was often easier to purchase those books in London or Paris than in their countries of origin. Secondly, the ideological and political constraints of publishing made the integrity of data questionable. Information was published mainly to illustrate a policy, and only those aspects were included that directly related to the policy in question. As well as a prescribed research agenda, researchers had to be wary of the political implications of their findings. In the pre-glasnost Soviet case, Lesage (1987, pp. 4–5) argued, ‘anyone accused of denigrating Soviet reality will have difficulty in continuing to gain direct access to personal information or in undertaking collaborative work’. Although censorship has been reduced since the collapse of the Soviet Union, data have not been validated, and they are still affected by bias.

These issues are discussed by Dagmar Kutsar and Ene-Margit Tiit in this volume, with reference to socio-demographic trends in developed nations and transition countries. They argue that, prior to Estonian independence in 1991, the lack of statistical controls made it difficult for the Statistical Office of Estonia to evaluate the accuracy of the data. The ideological burden of research meant that ‘some statistical procedures were adapted to the competitive needs of the main political leaders. Statistical data had to show the totalitarian system in favourable light’. Social statistics and some data categories from the pre-1991 era are also missing, which has a direct impact on the data collection in the IPROSEC project. Data on abortions and consensual unions, and also indicators such as unemployment, poverty or illiteracy were simply not available in transition countries prior to independence.

Access to data in the pre-1991 era was also limited. Even when data were collected, they were sometimes held ‘for official use only’. Since independence, concern is expressed about data quality, not least because of the underdevelopment of local statistical bureaux and the rapid development of new social problems, such as unemployment and poverty, with which these countries did not have to contend in the past. Reliable trend data are, thus, available for a ten-year period at most.

Problems associated with the integrity of data are not limited to transition countries. Baldwin-Edwards and Safilios-Rothschild (2000) make a strong claim that a large informal economy renders national employment figures problematic, because they cannot provide an accurate picture of the national situation. The informal sector – occupied particularly by illegal immigrants – is significant in Greece, where it is conservatively estimated at 30–35% of GDP. Nonetheless, those working in the informal economy do not feature in official statistics, and their impact on the workforce and the economy cannot be formally registered. Policy actors are, therefore, dealing with an unknown quantity when formulating policies because an important sector of the Greek population is excluded from the data upon which their decisions about policy measures have to be based.

Practitioners' problems

The researcher's own cultural and linguistic knowledge, disciplinary affiliations and resources also serve as important determinants of the way in which a question will be studied. The spatio-temporality of the practitioner is considered in this section as an issue arising in the management of cross-national comparative research projects and for evaluating the conclusions that are drawn from them.

THE RESEARCHER EMBEDDED IN SPACE AND TIME

Researchers are themselves products of the spatio-temporal context of their research. Over the past 30 years, researchers have become increasingly concerned with authorial positionality, particularly the ethical issues related to studies on different cultures and in different societies (Geertz, 2000). The main argument in this work has been the fact that researchers bring with them authorial baggage composed of 'ideas, concepts, doctrines, theories and data that are adduced to support them', but these are 'always rooted in a culture and sometimes ideologically loaded' (Lisle, 1986, 20). Culture is used here to refer to the culture of the individual's place of birth and nurture.

Ralph Kinnear (1987) has demonstrated the impact of the researcher's background through his work on Hungary and the United Kingdom before the collapse of the Soviet Union. Sociologists in the former country, he argues, were more integrated and less critical of the State than in the United Kingdom. Kinnear posits that this difference might affect the image potential respondents had of sociologists and so indirectly influence resultant data. Similarly, Jan Berting (1987) has argued that different intellectual styles and research traditions are associated with particular cultures and culture areas. He identifies three intellectual styles in the West (based on Galtung, 1982): the Saxon, the Teutonic and the Gallic. Each is associated with a certain agenda (exploration, empirical, theoretical or commentary), and with different places: the North Western culture area for Saxon and Teutonic, and in the Mediterranean culture area the Gallic style. As a result of these differences, approaches to research questions also differ culturally.

In a research project involving countries from across these intellectual divides, the result is a diverse range of practices to be negotiated by researchers from different cultural backgrounds. The findings of Kinnear and Berting are clearly pertinent to the present project. Often, the spatial and temporal context within which the researcher is working can influence an approach to a specific question and the way in which data are presented and interpreted. These differences have to be considered at the design stage of a project, and also when conclusions are being drawn from the cross-national comparisons made.

As well as their cultural roots in a certain place, researchers are embedded in disciplinary cultures. People working in different disciplines approach research questions in different ways. The analysis of socio-demographic change for cultural studies or political science researchers may demand a shift in focus between cultural or political dimensions and institutions. For geographers or economists, an interest in spatial variations or

economic impacts of socio-demographic change may be much more salient issues.

Disciplinary background may also influence the research process. Secondary analysis, statistical modelling, interviewing, surveys or archival work are a few of the various approaches adopted by cross-national researchers (Hantrais and Mangen, 1996). In a research team composed of individuals working in fields from across the social sciences, the methods adopted might be a cause of antagonism. 'Professional tribalism is as strong as national ethnocentrism', Rose, (1987, p. 9) argues, and easing interdisciplinary tensions in the research process by seeking advice from all participants, as well as being aware of the different strengths they bring to the research, is necessary to facilitate cross-national projects.

Taken together, the combination of national and disciplinary differences complicates the research process. Hantrais (1987, p. viii) found that, while these cultural and disciplinary differences may exist within the research team, useful collaboration can be achieved where least expected. 'Geographers from one country find that their approaches and interests are closer to those of economists in another national context', she suggests. Out of seeming division, an unexpected union may lead to fruitful research not only across nations but also across disciplines.

The task of the research team is to be aware of potential national and disciplinary disharmony but to seek to transform it into co-operation and collaboration wherever that potential is found to exist.

Implications of space and time for policy

Space and time are crucial factors in understanding socio-demographic change. In this paper, it has been suggested that variations need to be taken into account across and within countries, while the rate and pace of change have to be understood in relation to historical events in places around the world and with reference to their different impacts in space and time within and between countries. So what does this mean for policy actors?

An understanding of space and time can be a great asset to policy actors. As can be deduced from the discussion above, policies formulated at EU level have to be operationalized in very different socio-cultural settings, which means that policies may have varying degrees of efficacy both across and within nations.

Similarly, policies formulated at national level will also face different rates of assimilation due to within-country variation. After all, 'governments of countries have limits as institutions of homogenisation' (Teune, 1990, p. 42). To make more effective policies that will respond to the changing needs of a heterogeneous population, policy actors need to be aware of these spatial and temporal variations and of the impact of their policies across space and time.

The discussion has also demonstrated how the social and political climate in individual countries changes over time. Such change can be slow, evolutionary, rapid or revolutionary. Policy actors need to consider not just short-term variations but long-term issues and how to address these appropriately. They also need to take account of the longer-term issues raised by policies designed to provide a response to an immediate problem. Understanding the spatio-temporal dimensions of demographic change is thus

a central requirement for effective policy formulation and implementation in EU member and applicant states.

Endnotes

1. Nations can also be defined legally and economically. These dimensions are relevant to the IPROSEC project, although the focus in this paper is the nation is in its political, territorial and cultural articulations.
2. The impact of events can have varying degrees of influence within different countries. Therefore, the spatial patterning of socio-demographic changes over time must also be considered.

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2. Ethnicity as a Cross-National Policy Variable

Alec G. Hargreaves

The concept of ethnicity is generally understood to refer to forms of collective belonging based on perceptions of shared origins. As noted by Barth (1969), ethnicity is inherently situational; that is, a sense of belonging to a particular ethnic group is conditional on perceived differences from other ethnic groups. Many (but not all) ethnic groups are defined, in part, by perceived relationships with internationally recognized nation states. In the anglophone world, it is common to speak of majority ethnic groups as those which are dominant not only, or even necessarily, in numerical terms but, more importantly, in their access to power within 'national', that is state-bounded, spaces. Minority ethnic groups are defined by positions of relative weakness in relation to the dominant ethnic groups within those spaces.

At least three main types may be distinguished in the spatio-temporal features characterizing relations between majority and minority ethnic groups: regional minorities, dispersed and/or nomadic minorities and immigrant minorities. Regional minorities are usually long-established groups with many generations of continuous presence in a sub-region of the state-bounded territory. While often numerically dominant within regional spaces, they are in minority positions at national state level. Examples include Catalans in Spain, Corsicans in France and Scots in the United Kingdom. Dispersed and/or nomadic minorities may also have a long presence within state-bounded spaces, but unlike regional minorities they are dispersed across wide areas within and sometimes across state boundaries. In Europe, the largest groups of this kind are Roma (Gypsies).

Immigrant minorities have their origins in relatively recent international population movements originating outside the states in which they are now settled. Seldom if ever numerically dominant on a regional scale, they tend to be concentrated near major employment centres, with relatively dense micro-concentrations in certain localities. Examples include Turks in Germany, North Africans in France and South Asians in Britain. The present paper focuses on the significance of ethnicity as a policy variable with reference to immigrant minorities. Other papers in this volume deal with regional and dispersed or nomadic minorities.

Minority ethnic groups typically suffer from two major sets of problems: an intergenerational history of social disadvantage, and discriminatory treatment by members of the majority ethnic population. Effective policy responses are conditioned, in part, by the extent to which these kinds of problems are perceived as specific to certain ethnic groups or as part of a wider raft of social inequalities traversing ethnic boundaries. In some countries, such as France, considerable reluctance is shown by policy actors in recognizing ethnicity as a valid criterion for data collection and public intervention. Even in countries such as the United Kingdom, where ethnicity is now a well-established point of reference in the framing of public policy, there are complex and often divisive debates concerning the criteria by which ethnic groups are recognized. Differences of opinion concerning the pertinence and definition of ethnic categories, combined with the uneven spatial distribution of minority ethnic

groups, often make the effective targeting of these groups a challenging objective for policy actors. These difficulties, together with huge variations in the ethnic composition of the populations residing within different states, combine to make cross-national comparisons in the field of ethnicity extremely problematic.

These difficulties are illustrated in the next section of the paper with particular reference to France and the United Kingdom, which are often represented as polar opposites in policy approaches towards ethnicity. While it is certainly the case that policy makers in France generally eschew any explicit reference to ethnic categories other than that of nationality (which in France is not officially regarded as an ethnic category), it is not entirely true to say that ethnicity is wholly absent from the policy-making process. At the same time, the British experience illustrates very clearly the complexities and difficulties involved in trying to operationalize ethnic categories in the service of social policy even when commitment to the principle of recognizing ethnicity as a significant factor in social relations is widely shared. In the second part of the paper, the difficulties involved in attempting to make cross-national comparisons on an EU-wide basis are illustrated with the aid of *Eurobarometer* data.

The concept of ethnicity in France and the United Kingdom

Ethnic categories are especially problematic as a basis for social policy because of the subjective dimensions inherent in their definition. As ethnicity revolves fundamentally around feelings of collective identification, no wholly objective criteria can be found by which to delineate the boundaries between ethnic groups. In some countries, nationality serves as an official marker of ethnic boundaries, as is the case in France, where public discourse places great emphasis on the distinction between French nationals and foreigners, though this is not officially recognized as an ethnic distinction.

However, as the formal citizenship status of individuals is not generally a matter of public knowledge, in everyday social relations people are often treated as ethnic insiders or outsiders on the basis of perceptions that have nothing to do with legal definitions of nationality. Real or supposed differences of skin colour, 'race' or culture commonly serve as subjective markers of ethnic identities.¹ Subjectively defined ethnic boundaries may be positioned very differently if drawn on the basis of self-ascription on the one hand or of external categorization, on the other. The ethnic group within which a person positions him or herself is defined, in part, by those whom s/he excludes from membership and the different groups to which they are perceived to belong. Those excluded by external categorization of this kind may not share the same perceptions. They may ascribe to themselves membership of a group from which they are excluded in the eyes of others and/or may identify with ethnic groups whose self-drawn boundaries are positioned differently from those of the ethnic categories in which they are perceived by outsiders (Mason, 1990).

Social scientists, policy actors and ethnically based activists often disagree on the relative importance which should be attached to self-ascription as compared with external categorization in the definition of ethnic boundaries. Some consider that membership of an ethnic group should be defined by those who willingly include themselves within it. If, however, ethnic boundaries are

regarded entirely as a matter of personal choice, there is potentially no limit to the number or types of ethnic groups that might claim the attention of policy actors.

In Britain, some minority ethnic activists define themselves by skin colour (most commonly, 'black'); others use geographically derived markers (as in 'Asians', for example), while others again focus on religious criteria (defining themselves, for instance, as 'Muslims'). In France, race or skin colour is seldom highlighted by minority ethnic activists, but they remain just as divided as their counterparts in Britain by different approaches to the construction of ethnic categories. Some focus on nationality or regional geography (in speaking, for example, of Algerians or North Africans), others speak of trans- or subnational ethnic groups such as Arabs or Berbers. For others again (certain Muslims or Jews, for example), religion is the primary marker of ethnicity.

Self-ascribed forms of ethnicity are liable to be particularly relevant in the field of multiculturalism, where public agencies seek to promote 'positive' attitudes towards elements of cultural diversity valorized by minority ethnic groups. Relevant categories in the context of multiculturalism may be less appropriate for policy formulation designed to address social disadvantage and/or discrimination. Minorities who suffer from racial or other forms of ethnic discrimination are the victims of boundaries drawn in the minds of majority ethnic actors, whose positioning of such boundaries may be very different from the self-perceptions of people excluded in this way. If policy actors wish to redress the effects of this discrimination and/or eradicate the discriminatory behaviour itself, they are, in many ways, obliged to construct their interventions around the exclusionary categories structuring the ethnic prejudices of the majority (Mason, 1991).

Since the 1960s, governments in Britain have been committed to addressing both the social disadvantages and the discriminatory treatment suffered by minority ethnic groups. In support of these policies, a wide range of private and public institutions are now encouraged, or required, to engage in ethnic monitoring, by recording ethnically based data about employees, customers or services users. The ethnic group boundaries around which public policy has been constructed have undergone repeated modifications reflecting not only the imperfect conjunction of social disadvantage and racial discrimination but also changes in the ethnic composition of the population and the competing agendas of different minority groups (Lassalle, 1998).

During the 1970s and 1980s, the size of the ethnic minority population was officially calculated by adding up the number of people living in households headed by persons born in New Commonwealth countries and Pakistan (NCWP), that is in former British colonies where the vast majority of the population was other than white, together with those whose parents were born in NCWP countries. The efficacy of this methodology was weakened by the growth of a third generation of NCWP origin (who fell outside its scope), as well as by the difficulties involved in classifying members of households with mixed ethnic origins (consisting, for instance, of an immigrant married to a majority ethnic spouse, together with their children). The 1991 census tried to overcome these and other weaknesses by including for the first time in Britain an explicit ethnic question which was not directly tied to place of birth. Each person was assigned to one of the following categories: White, Black-Caribbean, Black-

African, Black-Other, Indian, Pakistani, Bangladeshi, Chinese and a residual category labelled Any Other Ethnic Group (Anwar, 1990).

At one level, the 1991 census maintains and refines the assumption made in earlier methodologies that ethnic minorities are basically defined as non-whites. This is the underlying principle separating the first ethnic category ('white') from all the others. But, at another level, the criteria by which non-white categories are defined hint at both the diversity and the competitive dynamics present within the minority ethnic population as a whole. If the only significant marker of ethnicity contributing to social disadvantage and/or discrimination were skin colour, there would be no need for many of the subcategories into which non-whites are divided here. In fact, huge differences exist in the socio-economic profiles of different minority ethnic groups, as measured by indicators such as educational attainment, income per capita and unemployment rates. For instance, people of Pakistani and Bangladeshi origin are particularly disadvantaged, while the Indian minority outperforms whites on many indicators (Modood *et al.*, 1997). Findings of this kind obviously call into question the validity of umbrella ethnic categories such as 'Asian', which are often used in other contexts.

The findings do not necessarily mean that those classed as Indians are immune from racial discrimination. It may well be the case that their socio-economic successes are being achieved in spite of discrimination, which still, therefore, requires public intervention. At the same time, it is increasingly apparent that skin colour is not the only ethnic marker attracting discriminatory behaviour. Members of Britain's Irish minority, hitherto included among majority ethnic whites in many official datasets, have been pressing with growing success both the law courts and the Commission for Racial Equality (CRE), the main public agency responsible for overseeing the implementation of anti-racist legislation, for recognition as a minority ethnic group within the terms of that legislation. Convinced that Islamophobia contributes to the disadvantaged status of Pakistanis and Bangladeshis (who, unlike Indians, are mainly of the Islamic faith), Muslims have been mobilizing for the recognition of religion as another factor in discriminatory behaviour. Reflecting these and other pressures, the next British census will include a question on religion as well as a revised question on ethnicity expanded to include new categories such as Irish, Black British and Mixed. One of the consequences of these modifications will be to hamper longitudinal studies of the social trajectories of ethnic groups since the number and range of categories will have changed.

While imperfect in many ways, ethnic monitoring in Britain has yielded a substantial body of data which helps to guide policy actors in addressing problems of social disadvantage and discrimination. France has no direct equivalent; ethnic categories are officially excluded from the policy arena on the grounds that their use would weaken national cohesion and/or deny the personal autonomy of individuals. In reality, the situation in France is somewhat less clear-cut than this, for certain aspects of public policy are constructed around categories that are ethnic in all but name. For example, the state-run Fonds d'action sociale pour les travailleurs immigrés et leurs familles (FAS) targets its resources specifically in favour of immigrants and their families. Because the official objective of this funding is the 'integration' of those concerned into mainstream society, the FAS is not formally regarded as an ethnically-oriented organization.

This optical illusion at the level of nomenclature does not alter the fact that the beneficiaries of FAS policies are defined by their ethnic origins. A similar ethnic dimension is present just below the surface of France's *zones d'éducation prioritaires* (ZEPs), socially disadvantaged areas receiving extra school funding. One of the criteria by which ZEPs are recognized is the presence within the locality of a relatively high proportion of children of foreign origin. Again, the word 'ethnic' is not used, but ethnic origins are, in practice, an integral part of the criteria by which this aspect of public policy is informed. These and other policies in France resemble certain aspects of those pursued in Britain in favour of disadvantaged minorities (Lapeyronnie, 1993). But in the absence of any system of ethnic monitoring, the French have no way of measuring the success or failure of these policies. Effective action against racial discrimination is equally hampered by the absence of ethnic monitoring.

In recent years, recognition has grown that this official blindness to ethnicity is at odds with the daily realities of civil society, where it is clear that minority ethnic groups suffer not only from social disadvantage but also from racial or other forms of ethnic discrimination. Nationality, traditionally the only *de facto* ethnic criterion used in official French datasets, is clearly inadequate as an index of ethnicity, whether self-ascribed or externally constructed. Omitted from the category of foreign nationals are not only significant numbers of immigrants (about a third of whom are naturalized French citizens) but also virtually all of their descendants (who automatically receive French citizenship). Under the leadership of Michèle Tribalat, a demographer at the Institut national d'études démo-graphiques (INED), a number of researchers have been attempting to remedy these statistical shortcomings. Tribalat began by exploiting data on place of birth, which have long been collected by the French census authorities but almost never used in published analyses. Her study of households headed by residents born outside France (Tribalat, 1993) used a similar methodology and shared the same weaknesses as British studies based on households headed by NCWP immigrants. More recently, Tribalat has conducted surveys based on ethnic categories which embrace second- as well as first-generation members of minority groups (Tribalat, 1996). The criteria governing the construction of her categories have attracted fierce criticism (Blum, 1998; Le Bras, 1998), and there is still no prospect of similar categories to those in Britain being adopted for the purposes of ethnic monitoring. In the absence of ethnic monitoring of this kind, it is clearly impossible to conduct reliable statistical comparisons between Britain and France concerning the actual or potential role of ethnicity as a variable in social policy.

EU-wide comparisons

Even if ethnic monitoring were to be adopted in France, and indeed throughout Europe, the situational nature of ethnic identities would still present formidable problems for cross-national comparisons. The ethnic composition of the population varies markedly between different countries. By the same token, large visible minorities exposed to relatively high levels of discrimination in some states may be of no more than marginal significance elsewhere. This inevitably makes it difficult to compare levels of ethnic prejudice across national boundaries. In theory, these difficulties may be partially surmounted by

conducting more general enquiries about levels of racism or other forms of ethnic discrimination, rather than focusing on attitudes towards particular ethnic groups. But here too serious problems of comparability arise because of wide variations between countries in the types of criteria that are perceived to be salient in constructions of ethnic categories. These difficulties may be illustrated by data collected in several *Eurobarometer* surveys on attitudes towards 'race' and related issues.

Aware of the demographic variations between different countries, the *Eurobarometer* team devised a series of questions designed to measure attitudes towards a variety of outgroups as viewed from the position of individual respondents. Interviewees were asked to say whom they thought of when they heard of people of another nationality, another race, another religion, another culture and another social class. In all cases, interviewees were invited to answer spontaneously, and, therefore, no pre-determined categories were imposed.

The first survey of this kind was carried out in 1988, using an identical questionnaire in all 12 European Community member states (*Eurobarometer*, 1989). Most Britons named Blacks and Indians as the racial groups that came most readily to mind, while a majority of the French named Arabs and Blacks. In both cases, the responses reflect the demographic importance of these groups among the visible minorities of the countries concerned (assuming that 'Indians' may be understood to embrace all persons originating in the Indian subcontinent, including Pakistanis and Bangladeshis). However, far more Belgians thought of Blacks than of Arabs when asked about people of another race, despite the fact that, in Belgium, North Africans are more numerous than residents of sub-Saharan origin.

As in many other parts of Europe, in Germany, minorities of Islamic heritage often attract hostility on religious or cultural grounds. The racial category cited most frequently by interviewees (47%) was that of Blacks, whereas only 1% named Turks as a racial group. Compared with the large Turkish minority, relatively few people are of African or Caribbean origin in Germany. Asked whom they thought of as people of another culture, 24% of German respondents named Turks, 21% named Middle Eastern Asians, and 7% named Muslims. Although these three categories do not overlap exactly, it is clear that Turks constitute the most important cultural outgroup in the eyes of the German population. As Turks often display physical and other markers that distinguish them from the majority ethnic population, in practice they constitute by far the largest visible minority in Germany and are often the targets of prejudice and discrimination.

Having been asked to give their own definitions of national, racial and other outgroups, respondents were invited to indicate whether they felt groups of this kind living in the country concerned were too large. In Britain and France, national and racial outgroups were ranked more or less equally as being excessively large. In Germany and Italy, foreigners were more frequently regarded as too numerous compared with racially-defined others. In Spain and Ireland, social class outgroups outranked foreigners as the main groups regarded as too big. These kinds of variations in the salience of different ethnic criteria, which are again evident in the most recent EU-wide survey,² make it extremely difficult, if not impossible, to conduct reliable comparisons of the levels of ethnic prejudice and discrimination across state boundaries.

In a 1997 survey (*Eurobarometer*, 1997), respondents in all 15 EU member states were asked whether they considered themselves to be racist. At first sight, the results might appear to constitute an authoritative league table of the levels of ethnic prejudice within the EU, ranging from Belgium at one extreme (with 81% of respondents answering this question declaring themselves to be in some degree racist) to Portugal at the other (with a figure of 42%). But as 'race' is not considered the most salient factor in defining outgroups within all 15 EU states, these seemingly comparable data may not in fact be a reliable index of the true levels of ethnic prejudice and discrimination present in different countries.

Policy challenges

Minorities of immigrant origin are historically rooted in international population movements traversing state borders. In important respects, however, their current condition as minority ethnic groups is defined by subjective perceptions that are only very loosely related to actual movements across physical or political boundaries. Many of those perceived as outsiders were in fact born within the territorial boundaries of the state to which their migrant forbears migrated, and they are legally citizens of that state. Turning that formal citizenship into fully effective social participation is a major challenge for public policy, not least because it depends on rolling back the boundaries of popular prejudices that are far from easy to measure or control. Cross-national comparisons of these problems and of the effectiveness of policies designed to combat them are rendered still more difficult by the situational nature of ethnic identities, large variations in the ethnic composition of the populations of different countries, and marked differences in the willingness of states to engage in ethnic monitoring.

Endnotes

1. In the remainder of this paper, group boundaries based on racially constructed differences are treated as sub-forms of ethnicity. 'Race' is, of course, devoid of validity as a scientific concept (hence the quotation marks placed around it here), but it continues to inform many popular perceptions of ethnic differences.
2. In this survey, respondents were asked whether they found the presence of three different types of outgroups – categorized respectively in terms of nationality, 'race' and religion – disturbing in their daily lives. 'Race' was cited as the most disturbing factor in six countries, nationality was considered more worrying in four countries, race and nationality were given equal weighting in two states, while respondents in three countries found religion the most disturbing factor (*Eurobarometer*, 2000).

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3. Differentiation in Mothers' Employment Patterns in the European Union

Tess Kay

The purpose of this paper is to investigate the policy significance of differentiation in mothers' employment in the eight member states of the European Union that are the focus of the IPROSEC project (France, Germany, Greece, Ireland, Italy, Spain, Sweden and the United Kingdom). Most comparative analyses of women's labour market participation across the EU concentrate on differences in the overall levels of women's employment, and differences between male and female employment rates. This paper is concerned with investigating the amount of diversity in female employment rates within selected countries, and with comparing countries in this respect. In addressing diversity, the main focus is variations associated with social class, represented by measures of educational attainment.

The paper examines two issues of concern to policy actors. Firstly, it provides an overview of the relationship between female educational attainment and employment status and the question of whether women's and mothers' access to employment is more equal across social classes in some EU member states than in others. Secondly, it investigates whether the variations in countries' employment profiles are associated with differences in their countries' policies to support maternal employment. This raises questions about the role of policy in contributing to contrasting patterns of female employment in different EU member states.

The paper provides an analysis of current patterns of employment for women with different levels of educational attainment, in the eight EU member countries that are the focus of the IPROSEC project. The analysis is concerned with the extent to which gaps exist between the employment rates of women of different educational status. The level of equality/inequality in maternal employment rates is then considered, and related to previous analyses of EU countries' policies to support mothers' employment. The difficulties in establishing either the existence or non-existence of policy influence on the basis of aggregate quantitative analyses is highlighted. The paper concludes with observations about the basis on which the policy influence on mothers' employment across the life-course can be evaluated.

Diversity in maternal employment

Labour market segmentation is a strong feature of European female labour markets (Rubery *et al.*, 1999). Labour market activity varies within female populations according to a range of characteristics, including social class, education, family size, household composition, ethnicity and migrant worker status. However, while the heterogeneity of female labour markets is generally recognized in academic analyses, it is less often highlighted in media, policy and research accounts of maternal employment. These more commonly focus on how women differ from men in their employment, than on how they differ from each other. Such studies underplay the differential impact of changes in

paid work and domestic labour on women and their families in different positions in the social structure.

The following analysis uses 1997 European Labour Force Survey data to investigate variations in labour market access for women and mothers with different levels of educational qualifications. Educational qualifications have multiple effects on employment experiences: they enhance job prospects, earning potential and employment aspirations. Highly qualified women have distinctive employment patterns in comparison with the rest of the female working age population, characterized in particular by greater continuity in their labour market attachment. They benefit from greater employment opportunities and greater ability to afford childcare, and they and their partners may be less likely to subscribe to the expectations of the traditional 'male breadwinner' model of family life (Rubery *et al.*, 1999, p. 87). In contrast, women with low levels of education face restricted labour market opportunities, low income, are particularly dependent on family-related policy interventions during parenting years and particularly vulnerable to policy deficits.

The standard international threefold classification of educational attainment levels is used. Levels of general education have been classified as low, medium and high. 'Low' refers to individuals who have completed the first stage of general second level education but have not completed the second stage, and those who have not completed the first stage. 'Medium' refers to persons who have completed the second stage of the general second level education but have not completed a recognized third level education. 'High' refers to those who have completed a recognized third level education. The main emphasis of the analysis is on highlighting the contrasts between the two extremes: between women with 'low' qualifications and those with 'high'.

The underlying intention of the paper is to identify variations in women's employment across the social spectrum. Methodological barriers make it unfeasible to do so using direct classifications of occupations. Although European Labour Force Survey data employ a harmonized fourfold classification of occupations for member states, concerns remain about comparability in applications by different countries (as discussed in the first issue of this series of *Cross-National Research Papers*). More fundamentally, classifications based on occupations are useful for analysis of the composition of the workforce but cannot be applied to the non-employed working age population. In comparison, the EU measure of educational attainment is independent of labour market activity. For these reasons, the focus of the paper is on measures of educational attainment: they have some validity as indirect and approximate indicators of social class, but the relationship is clearly imprecise.

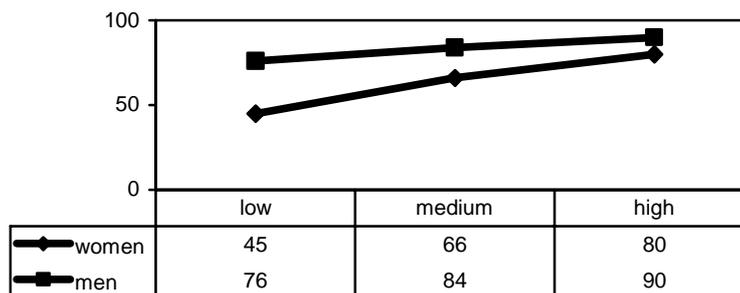
Diversity in women's employment patterns

A strong correlation is found between the educational attainment of women in the EU and their labour market activity. In 1996, employment among highly educated women was almost twice as high as for those with low educational qualifications. As shown in Figure 3.1, the relationship between educational level and likelihood of being in employment was much stronger for women than for men: in 1996, the employment rate for men with a low level of education was 84% of the rate for men with 'high' education; for women, it was only 56%.

Educational level is, therefore, a much more powerful discriminator for female employment in Europe than for male, and low levels of education are much more likely to be correlated with non-employment among women than among men (Jönsson, 1999).

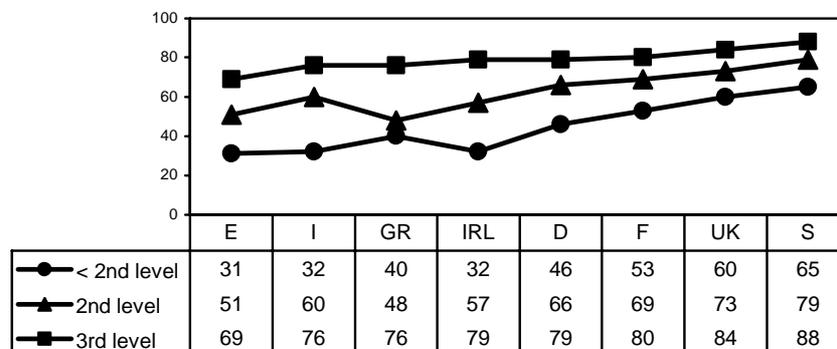
The EU countries vary considerably, however, in how strongly differentiated employment rates are for women with different levels of educational qualification. Figure 3.2 compares access to employment for women in each category of educational attainment, across the eight IPROSEC EU member countries. The countries are ordered according to their level of employment for highly educated women, and a number of features are apparent. Firstly, it is clear that levels of employment are very different for the three standards of education; little overlap can be found between the three trend lines. It can also be seen that there is more variation between countries at the lower levels of education than at the highest. Highly qualified women have fairly similar rates of employment across the EU: they range from 69% in Spain to 88% in Sweden, but most fall in a narrower band (75%+). More variation is found among women with medium qualifications (48% in Greece to 79% in Sweden, a range of 31%), and most among those with the lowest qualifications (from 31% in Spain to 65% in Sweden, that is a range of 34%).

Figure 3.1 Employment rates by sex and educational level, EU15, 1997



Source: Eurostat, *Labour Force Survey 1997*.

Figure 3.2 Women's educational status and access to employment, 1997

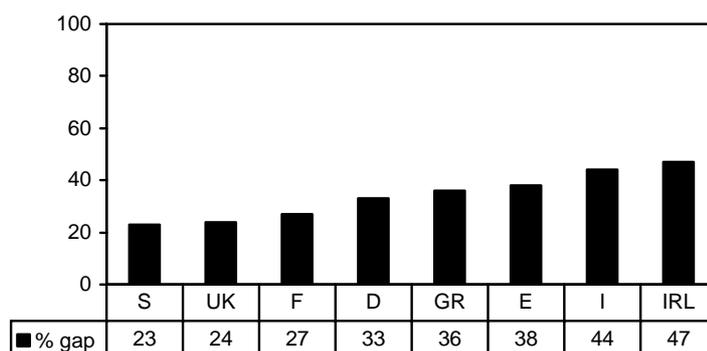


Source: Eurostat, *Labour Force Survey 1997*.

However, the uneven pattern of the trend lines also shows that high levels of employment for one educational group are not necessarily matched by comparatively high levels at the other. Finally, the differences between the three groups are strongest among countries with relatively low levels of women's employment overall. Countries characterized by high levels of female employment also seem to provide more equal access for women.

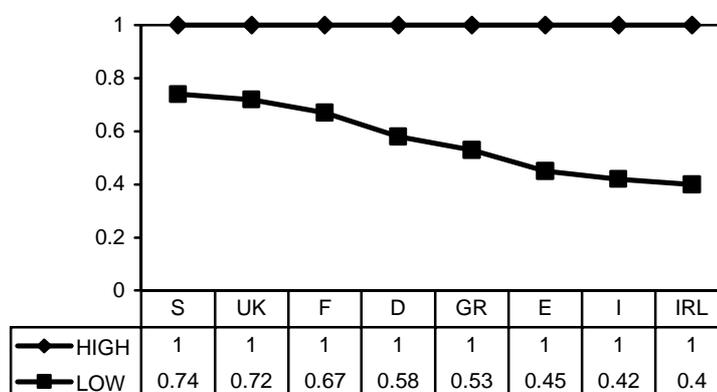
It is now possible to consider the 'education gaps' in the eight countries' employment rates, or how much difference education level makes to women's employment in different EU member states (Figure 3.3). It is immediately clear that while a relationship exists between educational level and female employment rates throughout the EU, its strength is very varied. The lowest impact is in Sweden, where the gap in employment rates between women with 'high' education and those with 'low' is 23%. The highest are in Ireland, where the gap is 47%, and in Italy, which also has a gap larger than 40%. The biggest gaps occur in countries where the employment rates for the 'lowest' educated

Figure 3.3 Gap in employment rates of women with 'high' and 'low' levels of education, 1997



Source: Eurostat, *Labour Force Survey 1997*.

Figure 3.4 Employment rates of 'low' educated women in relation to rates for 'high' educated women, 1997 (in %)



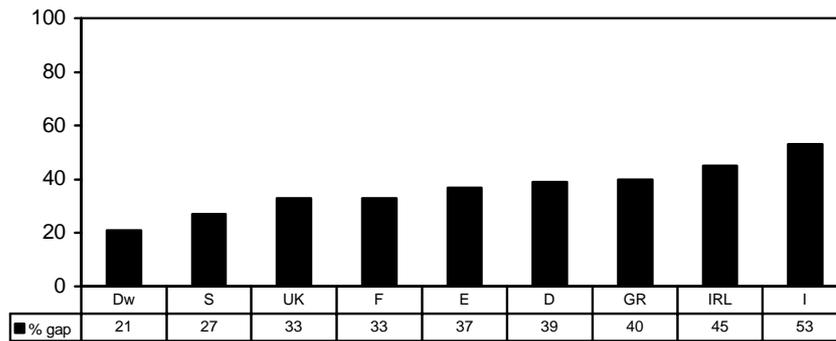
Source: Eurostat, *Labour Force Survey 1997*.

women are small. The relationship is even clearer when 'low' educated women's employment rates are calculated as a proportion of those of highly educated women (Figure 3.4). In Sweden, women with 'low' education are three-quarters more likely to be employed as those with 'high' education; in Ireland, the likelihood is only 40%.

The differences between the countries in employment rates for women with different levels of education are stronger among mothers than for women as a whole (Figure 3.5). This is not because the gaps between the 'high' and 'low' groups are bigger for mothers in every country than for women as a whole: in fact, in Ireland, they are slightly smaller. For the EU as a whole, however, the gap varies more between countries, and is particularly high (53%) in Italy.

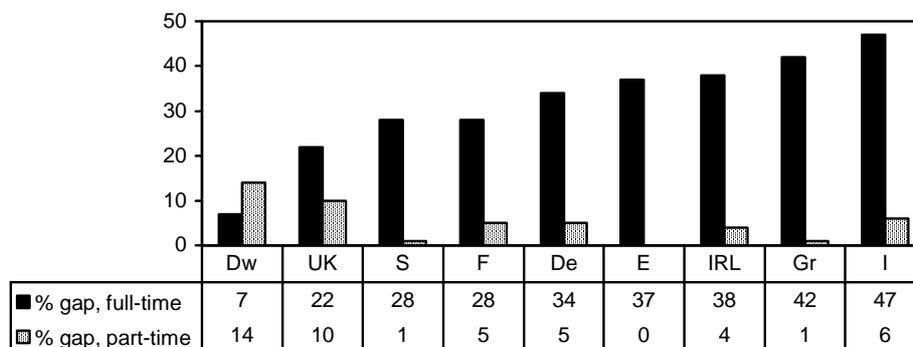
Most of the 'education gap' in mothers' employment stems from differences in full-time employment. Mothers' part-time employment shows very little variation at all. Thus, although the countries vary in overall levels of mothers' part-time employment, the take-up of part-time employment is very consistent across the female populations within each country.

Figure 3.5 Gap in employment rates of 'low' and 'high' educated mothers



Source: Eurostat, *Labour Force Survey 1993, 1994, 1996*; data provided by Rubery, 2000.

Figure 3.6 Education gap in mothers' full-time and part-time employment



Source: Eurostat, *Labour Force Survey 1993, 1994, 1996*; data provided by Rubery, 2000.

In most European countries, the gap between 'high' qualified and 'low' qualified mothers is 5% or lower (Figure 3.6). On the one hand, this shows that part-time employment is as accessible to 'low' qualified mothers as it is to 'high' qualified mothers; viewed another way, it also shows that 'high' qualified mothers are as likely to take up part-time employment as 'low' qualified mothers are.

This similarity between 'high' and 'low' qualified women deserves further consideration. It contrasts with overall comparisons between the groups, which show the extent of the difference in the labour market behaviour of 'high' qualified and 'low' qualified mothers, because of differences in their levels of full-time employment. It is equally important to recognize how similar they are in part-time employment. If mothers of different educational levels are equally likely to work part-time, and this similarity occurs despite overall variations in female employment rates, the question arises as to whether this indicates common experience, or whether it is actually evidence of how differently mothers relate to the labour market and perceive the role of paid work in family life. The similarities in these behaviour patterns do not reflect similar circumstances and processes, and are unlikely to represent similar levels of agency and constraint. Mothers who work part-time range from those who do so because their labour market activity is highly constrained to those who enjoy an extreme degree of freedom in their choices about employment, and, therefore, about motherhood. 'High' qualified mothers working part-time provide an interesting example of women's preferred strategies for reconciling paid work and family life.

The conclusion from the evidence on part-time employment among mothers is that not much difference can be found between 'high' educated and 'low' educated mothers' part-time employment rates and that this situation is common across the EU. The picture for full-time maternal employment is very different (Figure 3.6). The variations are probably as one would expect. Firstly, the gaps in employment rates between women with different levels of education are larger for full-time employment than for part-time, and secondly, more difference is found between countries in how big these gaps are. Some countries with the largest difference between part-time employment rates for mothers with different levels of education have relatively small difference in full-time rates: (West) Germany and the United Kingdom are examples. Diversity in mothers' employment does not appear to affect part-time and full-time employment equally.

Overall, the analysis of variations in women's and mothers' employment patterns according to their educational status shows strong differences between countries. Access to employment is particularly unequal for mothers, as a result of variation in access to full-time employment.

Policy and differentiation in employment

The question of how, and indeed whether, family related policies affect women's labour market participation, is a complex one. Researchers in this area emphasize the multifaceted nature of the relationship and highlight the existence of 'exceptional' countries that deviate from overall patterns. Notwithstanding this, Mary Daly (1999) has reported a strong correspondence between high levels of state childcare policies and high levels of maternal

employment, and Janet Gornick *et al.* (1997), while emphasizing that women's employment is affected by a diverse range of social, cultural and economic factors, have similarly concluded that policy influences employment choices. The overall conclusion of such work is unequivocal: differences in states' policies on childcare do correspond with variations in women's labour market behaviour. In the current context, what is of interest is whether differences in such policies also correspond to levels of differentiation in women's access to employment.

The findings of three studies that have undertaken international comparisons of policy support for maternal employment show that, despite methodological differences, a high level of agreement exists between the three analyses in how countries were categorized (see Table 3.1). In addition, all are compatible with Jill Rubery *et al.*'s (1999) adaptation of Jane Lewis's (1992) breadwinner model, distinguishing between weak male breadwinner, modified male breadwinner and strong male breadwinner states. According to these classifications, the IPROSEC EU member states cover a wide spread of policy approaches, with France and Sweden representing the most supportive policy, Greece, Ireland, Italy and Spain the least, and Germany and the United Kingdom lying somewhere between these two extremes.

To what extent do these analytical categories also correspond with the outcome of the education based analysis of maternal employment presented above? Does a relationship exist not only between overall levels of maternal employment and policy support, but also the universality of that support? In other words, do states with high levels of policy support for working motherhood display more equal access to employment for mothers across the socio-economic spectrum?

Comparison of social policy support for mothers' employment with the degree of difference in employment rates for mothers with varied levels of education, suggest a very imperfect fit (see Table 3.2). While the results show some evidence that lower differentiation (that is more equal access) occurs among 'highly supportive' states, the overall picture is too varied to provide evidence of a clear relationship at this level of evaluation (that is based on a primarily quantitative analysis, at the aggregate level). Thus, although a wide range of European research suggests that policy deficits are especially significant for 'low' qualified women, this is not fully evident in this type of evaluation. Importantly, however, the data do not disprove the possibility of policy acting as an influential factor in the development of such patterns of behaviour.

An alternative approach is to investigate the relationship through case study analysis of policy interventions and impacts in states with contrasting levels of education related differentiation in mothers' employment. Here the starting point should perhaps be at the extremes. The states with highly differentiated patterns of maternal employment are a particularly relevant initial focus of attention. Anne-Marie McGauran's (1999) appraisal of social policy and changing gender relations in Ireland provides an appropriate example of this approach, identifying how fiscal policy, social welfare policy, and the lack of state support for childcare, combine to provide economic incentives for mothers who are highly educated, but disincentives for those who are not.

Table 3.1 Classifications of economically advanced states according to social policy support for maternal employment

Duncan, 1996	Daly, 1998	Gornick, Meyers and Ross, 1997
HIGH: GROUP 1 Denmark France Sweden	HIGH Belgium France Denmark Sweden Finland	HIGH Belgium France Denmark Sweden Finland
LOW: GROUP 2 Netherlands West Germany United Kingdom	MEDIUM Austria Netherlands Australia Norway Italy West Germany	MODERATE Canada Norway West Germany Luxembourg Netherlands
LOW: GROUP 3 Belgium Luxembourg Greece Portugal Ireland Spain Italy	LOW Canada Portugal Greece Spain Ireland United Kingdom Luxembourg United States	LOW Australia United Kingdom United States

Sources: Duncan, 1996, pp. 74–110; Daly, 1999, pp. 12–52; Gornick *et al.*, 1997, pp. 45–70.

Table 3.2 Social policy support for mothers' employment in relation to employment rates by level of education

Country	'Low educated mothers' full-time employment rates as % of 'high' educated	Social policy support for mothers' employment
West Germany	72	2
France	50	1
Ireland	46	3
Sweden	43	1
United Kingdom	37	3
Spain	37	3
Italy	33	2
Greece	25	3

Key: 1 = high support; 2 = medium; 3 = low.

Source: Eurostat, Labour Force Survey 1993, 1994, 1996; data provided by Rubery, 2000; rankings derived from Duncan, 1996; Daly, 1998; and Gornick *et al.*, 1997, table 3.1.

However, it is not only analyses that focus specifically on policy that provide relevant insights into how policy is experienced in mothers' lives. Constanza Tobío's (1996) account of the strategies used by Spanish women to combine working and mothering shows how mothers in lower-class employment are heavily dependent on the extended family for childcare support, in the absence of affordable alternative provision. There are some similarities in the United Kingdom (Kay, 1999), where marked differences emerge in the childcare strategies adopted by women in different employment situations.

All three of these accounts draw out the disproportionate impact of particular policy deficits on lower-educated women, and come closer to providing a holistic analysis in which the influence of a range of different policy elements, and their interaction with each other, can be addressed.

Policy issues and implications

The level of variation in employment in the EU between women of different educational levels raises a number of considerations for policy. The diversity within female labour markets is so great that often bigger differences are found in employment rates within the female population than between men and women. These variations have a critical significance for policies to combat social exclusion, because of the impact of women's employment at the household level. Households in which 'low' educated mothers are either unemployed or can only work limited hours are not only likely to have low income, but also face particularly intensive demands in family life. 'Low' educated women are more likely to have families of above-average size and to bear children at an early age before they are well established in the labour market, and are also more likely to experience lone motherhood. In a highly diversified female labour market, the households of 'low' educated mothers are therefore those in most need of policy support, and most affected by policy deficit. However, such support is unlikely to be forthcoming unless the implications of this diversity are fully incorporated in the development and delivery of policy.

In relation to policy development, the first issue to be addressed is therefore the tendency of pan-European analyses of female labour market participation to focus comparative analysis on contrasts between men's and women's employment patterns, and to underplay differences within the female working age population. The relative invisibility of the diversity in women's situations is both reflected in, and a reflection of, inadequate development of gendered analysis of the Eurostat continuous datasets that are extensively used by policy actors. While this, and other sources, contains substantial material on family circumstances and on employment, the interrelationship between these sets of variables is not investigated. The absence of such analysis creates a circular situation: as the relationship between the variables is not recognized as a policy issue, it does not appear in the research report, an omission which itself makes it less likely that the relationship will be identified and addressed.

The limited use of family related variables in European labour market data sources produces a very discriminatory basis for analysis of men's and women's employment. Firstly, the failure to recognize the influence of family factors on parents' employment patterns establishes a masculinist norm about

the factors underlying labour market behaviour. This is inadequate for explaining women's relationship to the labour market and has implications for the precision with which the need for policy interventions can be identified and appropriate policy responses developed.

Secondly, by drawing attention to the different patterns of female employment that emerge in the same policy context (within one country), the analysis raises issues about the relationship between women's employment and social policy. It has been shown that the patterns of diversity identified do not fit neatly with common categorizations of EU member states according to their support for family life. Although the tendency is for the states with the most supportive regimes to display the greatest equality in women's access to employment, too many exceptions and deviations exist to indicate a very direct link.

Part of the explanation for this may lie in the limitations of cross-sectional analysis for deconstructing the relationship between women's employment and their experience of the welfare state. One of the features of women's employment patterns is the cumulative effect of early labour market experiences on later behaviour. Women who maintain continuity of employment during the early parenting years commonly achieve more favourable labour market positions in later working life than those whose labour market attachment is discontinuous and varied. The tendency to relate women's labour market participation patterns to current policy provisions may underplay the long-term influence of earlier social policy impacts on the labour market experiences of women.

On this basis, some value may be found in incorporating the ideas of variation and discontinuity more fully into analysis of the relationship between women's employment and social policy. A lifetime perspective on the forms of social policy that influence women's employment recognizes that women's labour market participation is affected by a more varied range of welfare support systems than that of men. It also highlights differences in the types of social policy that are most influential for facilitating women's employment at different stages. The use of life-course analysis of social policy dependency may be useful in depicting the constraints to be overcome when women are exposed to multiple deterrents to labour market participation which require integrated social policy responses.

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4. Comparing Socio-Demographic Indicators in Estonia and the European Union

Dagmar Kutsar and Ene-Margit Tiit

In response to the process of European integration and the extension of the Commission's competence in social affairs, Eurostat now regularly produce data on the social situation in European Union member states. The European Commission and other European agencies, such as the European Foundation for the Improvement of Living and Working Conditions, monitor socio-demographic trends, enabling comparisons to be undertaken between member states. For many years, Council of Europe and United Nations publications have provided data on the countries of Central and Eastern Europe, and some of the European Commission and Eurostat publications now routinely include information on selected indicators for the applicant states (for example, the annual publication, *Demographic Statistics*). Even within the EU, the supply of comparable data does not, however, satisfy the demand, and the homogeneous presentation of data conceals very disparate local situations. The need for information about EU applicant states can be seen as a further complicating factor, since these transition countries have all undergone a process of very rapid political, economic and socio-demographic change in a period of little more than a decade.

A number of studies have shown the links between the categories and tools used to compile statistics (concepts, surveys, definitions, nomenclatures) and the cultural and institutional contexts (legal norms, social policy objectives, social organizations) in which data are produced. Such studies emphasize the reductionary effects of statistical standardization not only in relation to national or local specificity but also in explanatory terms for those interested in examining ways of controlling social change. Another body of literature stresses the plurality of forms of regulation in contemporary societies. This work attempts to understand how public policies adapt to different local situations and situates the role of quantitative indicators among the tools available to social actors (Affichard *et al.*, 1998).

Our assumption in this paper is that indicators, as the name implies, are aggregated quantitative data indicative of developments in the areas concerned, used to inform the public and policy makers, and to prompt action. According to Joachim Vogel (1994), they can be used in at least three different ways:

- as performance indicators of progress toward official national goals;
- as statistical background data;
- as 'key statistics' for planning at national, regional and local, levels, and in business and other contexts

Indicators can also function as early-warning systems for social and economic planning, social dialogue and political debate.

Where indicators are used to measure the performance of countries and to classify them, as in the Human Development Index of the United Nations Development Programme reports, they can provoke a hostile reaction on the part of policy actors, who feel concerned about, or responsible for, the achievements of a particular state included in the list. The rank order of the

countries, as well as any change in it, may initiate heated public debates and policy discussions. The HDI has, for example, received a lot of criticism because of the way it is constructed and the method used to rank countries, in the absence of contextual analysis of cultural factors.

Social indicators do not, as frequently seems to be forgotten, have explanatory value for the phenomena under observation. Indicators are, however, no more 'neutral' than statistics (Desrosières, 1996). Their definitions and meanings change over time and place, as is abundantly illustrated by the case of the transition countries. Comparisons cross-nationally and across time assume that datasets can be harmonized, implying that agreement can be reached about the definitions of terms, unified conditions for data collection, aggregation and disaggregation. Where changes have occurred in collection or classification methods, earlier data cannot be systematically included under the new nomenclature until they have been reanalysed and amended.

The application of countries in Central and Eastern Europe to become members of the EU has focused attention on indicators concerned with welfare issues, poverty, social exclusion, family change and associated policy responses. These are all topics that were being addressed in the 1990s by the European Commission (for example DOC E2/IS/4/95) and by the Council of Europe (Duffy, 1998, for the transition countries). In this paper, we consider the problems that arise for the transition countries in producing meaningful indicators in these areas, with reference to some of the issues that need to be addressed with regard to methods. We draw on specific examples, including the poverty line, to illustrate the difficulties being faced by applicant states such as Estonia.

Selecting approaches to comparative studies

At first glance, it might seem appropriate to apply the universalist approach in analysing socio-demographic trends in the transition countries (Hantrais, 1999a), and the expectation might be that they will follow the same development as their Western neighbours. Accordingly, it could be assumed that statistical indicators will show the same trends as the European 'mainstream'. However, what is the European 'mainstream'? While many of the indicators used to monitor socio-demographic trends do suggest that EU member states are moving in the same direction, closer scrutiny reveals considerable diversity both within and between countries (Hantrais, 1999b). Does the mainstream mean falling fertility rates, increasing divorce rates, more widespread cohabitation or more children born out of wedlock as EU trends suggest? With references to these measures, Estonia shows the highest figures among the countries in transition.

The culturalist approach to cross-national comparisons is also difficult to apply to the transition countries (Hantrais, 1999a). According to the doctrine of cultural or linguistic relativism, the concepts and values characteristic of a specific society cannot be transported into another cultural or linguistic community. Therefore, comparing social statistics for different countries, even if the same definitions of the indicators are used, means comparing 'incomparables' (Simpura, 1997).

A specific example of non-comparability arises when an attempt is made to compare living conditions in three geographically, and for the past 60 years

also historically, close Baltic states, Estonia, Latvia and Lithuania. Although all three are characterized by the presence of non-native minorities of Russian origin, their origins and cultural specificities differ markedly from one country to another. In Estonia, the Russian minorities are for the most part of quite recent origin. Therefore, they have relatively weak ties to the native population. In Latvia, the minority have deeper roots; in the post-war period, the non-Latvian minority almost became the majority (Dreifields, 1996). In Lithuania, the situation is again quite different. The relatively small minority population groups in Lithuania are not a result of Soviet plans; but they are of different origin. From a comparative perspective, this is not a problem of categorization but an issue of interpretation.

In the IPROSEC project, a societal approach has been adopted (see the first issue in the present series of *Cross-National Research Papers*). Applied to the analysis of socio-demographic indicators in the transition countries, this approach allows for comparisons that take account of the systemic framework within which social phenomena are located. Inclusion of cultural aspects when attempting to identify universalist characteristics makes it possible to explain differences between the countries as well as offer new visions for developmental choices and prognoses. In this case, the analysis of social indicators makes it possible to measure important characteristics using universal parameters, but differences between systemic frameworks can be identified and given consideration.

Transition countries as EU candidate countries

In the framework of enlargement of the EU, characterization of transition states is more difficult than in the case of previous waves of membership. Although countries such as Greece, Portugal and Spain also underwent major political upheavals in the period preceding their membership, they had a longer period during which to adapt to democracy and were able to reform their economies more gradually than the transition states have been able to do. The transition countries should not be understood as countries that are 'lagging behind', in the sense that they will go through the same stages as West European societies. They are not 'underdeveloped'; they have simply undergone different social, economic and political experiences; their development has been directed by a totalitarian system, which diverted them from their own developmental tracks. While Western countries with advanced economies were carried forward by the mainstream, the development of transition states had been influenced by the Communist regime. The collapse of the totalitarian system has provided the opportunity for transition, turning the countries concerned towards the mainstream again, but moving at a different speed, as illustrated by Figure 4.1. It is not, therefore, appropriate for the transitional countries to imitate the strategies followed by the 'advanced' countries. Rather, they need to find their own way of reaching nationally fixed aims, which implies they also need their own performance targets and indicators that are sensitive to specific aspects of their development.

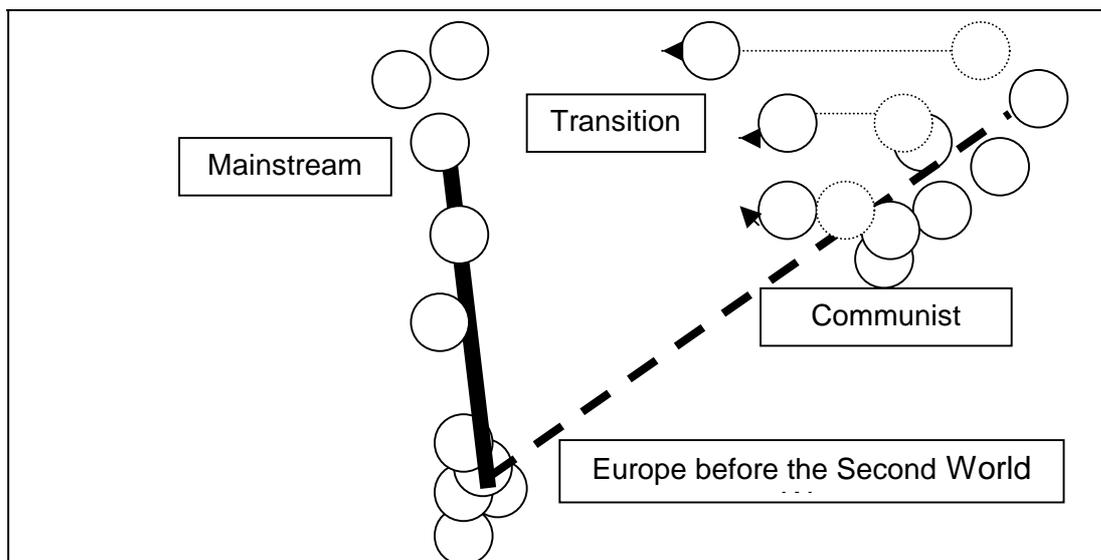
THE PRE-CONDITIONS OF TRANSITION COUNTRIES

What are the main characteristics differentiating the countries in transition that have currently diverged from the Communist pattern of development? The characteristic features of the transitional countries were determined by Communist ideology. The social order of these countries was built on different principles, irrespective of their developmental stages.

Total employment was guaranteed for everybody. Work outside the home was regarded as a privilege, and anybody not gainfully employed was frowned upon. Only students and women on maternity leave were excluded from this perception. The leaders of state enterprises were obliged to employ former prisoners and those returning from the compulsory detoxification programmes. Earnings were generally low and almost non-dependant on the educational level of the employee. Agriculture functioned on the basis of collective entrepreneurship, and the private sector of the economy was non-existent.

Housing and other social goods were distributed by the place of work. Housing costs were low, in Estonia, constituting, for example, only about 5% from the total household budget. At the same time, private initiatives to improve living conditions were severely restricted. Education was provided free of charge, and a large proportion of students received monthly bursaries. At graduation, both from a higher education institution or a vocational school, young people were placed in jobs and they had no right to change their place of work for three years. Free medical care was offered to everybody. Those considered to be in 'risk groups' (children, pregnant women, individuals with particular diseases) went through regular medical checks at specialized outpatient clinics. People with dangerous infectious diseases who refused to seek medical advice were obliged to undergo treatment, following a decision reached in the courts. The state system of children's homes (orphanages) made it possible for single mothers to give away their children to enable them to be brought up and educated free of charge.

Figure 4.1 Imaginary scheme for transforming Europe



There were many pre-school institutions, and some of them offered week-long care for pre-school children. This freed parents from the daily chores associated with taking care of children during the working week. In analysing the adaptations of the transition countries towards the mainstream, the following considerations need to be taken into account.

Firstly, individual educational attainment has been only slightly affected by the change in the system. As a result, the general level of education in the population is relatively high, particularly among women. Structural changes (cohabitation, divorces, illegitimate births) of families have taken place parallel to the rest of the West. Secondly, with the collapse of the totalitarian system and its planned economy, the Communist welfare system also ended. Reconstruction of national economies made it impossible for former social political measures to continue because they were too costly and largely ineffective. The high human costs of transition are revealed by the deterioration found in the socio-demographic indicators (decreasing life expectancy, worsening conditions of health, poverty and social exclusion).

Individual Socialist countries, thus, began to move towards the mainstream at different speeds and from different social and economic positions. The Baltic republics were characterized by a high degree of alienation from former ideologies and strong readiness to make cardinal changes in their approach to social, political and economic development, compared with the rest of the former Soviet Union.

Conditions for reliable data gathering

Social phenomenon can only be adequately measured if certain conditions are fulfilled. These include: appropriate categories, equivalence across time and space, the integrity of data, impartial questioning, and protection of the respondent. Social phenomena can only be measured if they are perceived to exist. For example, it was not possible to measure unemployment in the former Soviet Union because it was missing from the frame of reference of the Communist social order. Unemployment existed, but it was in a hidden form and, therefore, it was never revealed in statistics.

If the phenomenon is perceived to exist, then definitions and classifications need to be harmonized because they may differ between countries and for different time periods of measurement. For example, the classification of education was changed several times between the 1970s and 1990s. This makes comparisons over time complicated even in one particular country. If definitions and classifications are unified, then measurements are possible, but it is essential that society (including power structures) is ready to accept truthful measurements. This is the complication that generates the most uncertainty about statistical data collected during the totalitarian era. Even if society is ready, care has to be taken when using highly value-laden questions. Some social comparisons have revealed a tendency for respondents coming from totalitarian systems to give responses that show a bias towards what is socially expected of them.

The measurement is more reliable if the respondent's privacy is protected. In totalitarian states, individual privacy was not a particular issue. However, in the 1990s, the transitional countries passed regulations concerning the protection of individual data. An indication of this is the fact that

the Civil Census, carried out in Estonia in March 2000, excluded several questions about health complaints. In addition, respondents were left to decide for themselves whether or not to answer the question about religious affiliation. The degree of variance of the same indicator may significantly vary for different periods of observation. Therefore, when single categories are being compared, it is important to use identical methods and take account of variability. For example, if household incomes are measured over one month or a whole year, it is possible to make comparisons using average figures; the first case will give higher variance, while the second one will show less fluctuation.

For comparison of countries, it is not possible to include data for a country from the time when it was an integral part of another country. Estonia, as a transition country, was incorporated into the Soviet Union between 1940 and 1991 as one of the Soviet Socialist Republics. Consequently, data about Estonia as a separate country are available only from 1991. Statistical data for the period before 1991 are characterized by a number of features, as summarized below.

Firstly, they lacked statistical controls, resulting in probable bias in data generated for ideological reasons. It is difficult for the Statistical Office of Estonia to evaluate the accuracy of the data prior to 1991. For the period 1940–59 (the first postwar Soviet censuses), very few data exist. Only the statistics on demographic events (births, deaths, migration) were collected, but basic data about population size were subject to quite a large degree of error. Most data collected in Estonia were transported to Moscow for processing, but no copies were kept in Estonia. More or less reliable demographic data have been retrieved for the period 1970–90, using existing event statistics.

Secondly, statistical procedures were adapted to the competitive needs of political leaders. Statistical data had to show the totalitarian system in a favourable light. For example, the consumption of culture showed high figures. One of the reasons was that some expensive luxury goods, for example cars, were included under this category. Thirdly, data were not available on indicators suggestive of social problems such as drug use, disabilities, abortions and alternative family forms, namely consensual unions. Nor were data available on indicators such as unemployment or poverty; illiteracy as an indicator was included only in few censuses. Also, labour force statistics were not collected according to the same criteria. Finally, the majority of the data categories were published under the heading 'for official use only'. This also applied during the German occupation between 1941 and 1943.

Barriers to effective international comparisons

When comparisons are to be made using what are considered to be universally agreed social indicators, a number of problems arise, and are perhaps more difficult to resolve for the transition countries because of their statistical traditions. Even population counts, birth and death rates and life expectancy are not unproblematic measures, and net migration, employment / unemployment and poverty are especially contentious because of differences in sources and definitions and due to their political connotations. Some of the indicators contain a default precondition of stability (for example, life

expectancy, summated birth rate). In a rapidly changing society, this stable core may become unstable, or even inconsistent.

Problems are also likely to arise in compiling comparable social indicators in the case of transition countries if two different variables are presented in relation to one another, and if one or both of them are rapidly changing. A few years ago, international attention was drawn to the situation in Estonia, when the number of divorces in relation to the number of registered marriages for the same year was over 100%. In a situation where the number of marriages being contracted was decreasing rapidly, even though the number of the divorces remained stable, the divorce rate as an integrated measure showed a dramatic increase as illustrated in Figure 4.2.

Another example is the number of abortions and live births. When the two indicators are correlated with one another, they may produce unexpected results. Even if the number of abortions is decreasing in absolute terms, since the fall in the numbers of births is more rapid, the relative measure of abortions to live births shows an increasing trend. Also, average household income can be recorded using a standard, or universal, indicator, but it conceals different patterns of income distribution between countries. Setting the poverty line at 50% or 60% of the median income represents what has come to be accepted as a universal prescription.

Figure 4.2 Marriages and divorces in Estonia, 1988–98

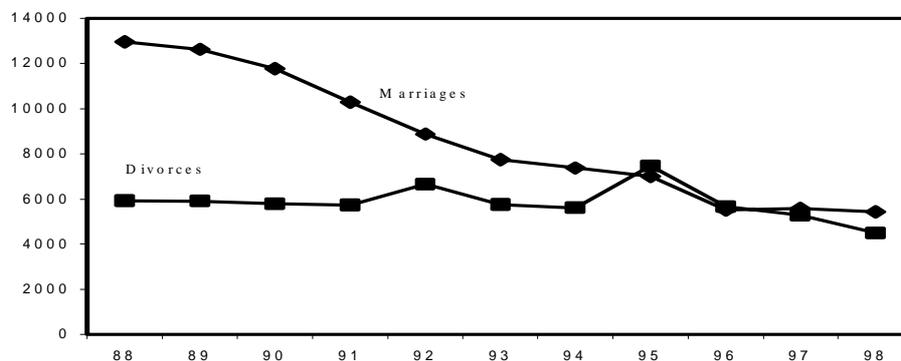
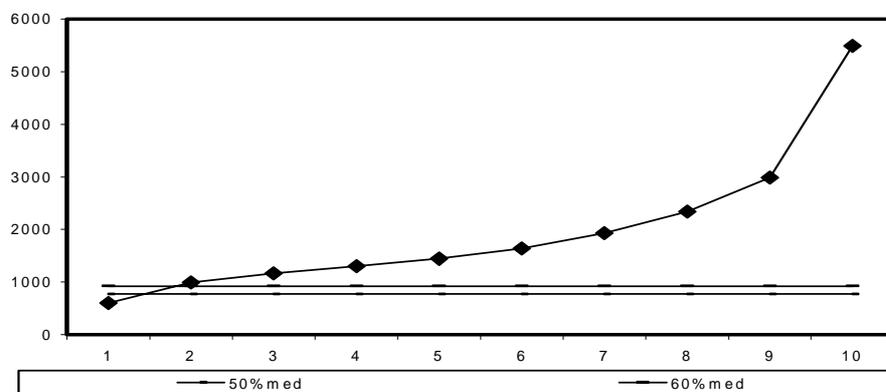


Figure 4.3 Net income by deciles in Estonia, 1998



In Estonia, it accounts for about half of the average old age pension. Relative poverty is shown to be either 5% (below 50% of the median equivalent income) or 8% (below 60% of the median equivalent income). As a result, transitional countries are found to have even less relative poverty than neighbouring welfare societies, since the poverty line is drawn 'among the poor', as shown by Figure 4.3. Unlike the countries that have had a market economy for a longer time period, in Estonia (and in the other transition countries) a major proportion of the population have consistently low incomes and the country lacks a strong middle class. The majority of the population began to accumulate property from almost nothing in the early 1990s. Property income thus forms a small part (about 1%) of the income structure of households. Savings above the monthly income level are owned by only about 20% of the population. Many of them are older people who keep their savings unused for funeral costs.

Although a big difference between the so-called new rich and the poor is often spoken about in Estonia, the proportion of the well-off, compared to countries with advanced market economies, is unexpectedly small. As a result, households whose income per member remains below the average can provide rather similar living conditions. For example, pensioner households most often belong to the fourth and the fifth income decile, and the average pension is close to the median income of the population.

Also, the equivalence scales suggested by the OECD (1, 0.7, 0.5) may not fully reflect the real situation in a given country. In Estonia, this is due to the high proportion of expenditure on essentials (food and housing) in the structure of overall spending. In this case, the equivalence scales need to be recalculated taking the real socio-economic situation of the country into consideration. As a result, a poverty line, proceeding from the socio-economic situation of the country is calculated and equivalence scales 1, 0.8, 0.8 applied in Estonia (Kutsar and Trumm, 1999). The poverty line in Estonia is a good indicator of its socio-economic situation and is meaningful for national purposes, but the number of poor is not comparable to that in other EU member states.

Developments in Estonian social statistics

Before 1991, the local statistical bureaux had data collection as their main function and they were not encouraged to develop their own techniques. Restoration of national statistics required considerable effort and resources to train staff, using foreign consultants and advisors, involvement in international networks, and the need for advanced technical equipment. The statistics of a newly independent state were adapted very rapidly to international standards, including all stages from data collection design and sampling to quality evaluation of survey data and social reporting. Many questions remain over the quality of data. The main reasons are connected not only with the underdevelopment of local statistical bureaux but also with emerging new issues of social concern, such as unemployment and poverty.

The situation of social statistics today is characterized by several positive developments. By 1997, the Estonian Statistical Office had accepted the majority of the definitions and surveys suggested by Eurostat (over 180 indicators measured every year). Eurostat has accepted the Civil Census that

was carried out in Estonia in March 2000. The Central Department of Health Insurance is an institution that functions well, documenting 92% of the population in its register. The Population Register is still not institutionalized, but the act making it law was in the process of elaboration and was expected to be in force in 2002. Another positive development is also decentralization of data collection supported by well functioning electronic networks.

The number and standard of the cross-sectional surveys have increased noticeably. However, there are some restrictions to Estonian social statistics, which are briefly as outlined below. Firstly, migration is still poorly documented because of a new regulation that makes registration of residence voluntary. Secondly, there is a high non-response rate in the Estonian Household Income and Expenditure Survey, caused by fatigue of the respondents resulting from participation in the lengthy survey. A respondent household is expected to fill in all income and expenditure during one month in every quarter of the year. Another problem is the small size of the national population (about 1.4 million), which means there is a high probability that a person will be included in many different social surveys. Thirdly, Estonia lacks an alternative system for registering individual incomes. The Individual Data Protection Act, passed in 1996, excludes the option to use data from the Department of Taxation. Hitherto, incomes have been measured on the basis of subjective responses. Finally, the administrative divisions in Estonia are too small in comparison to other countries. For this reason, the data from social surveys are often not disaggregated by the smallest administrative units (local government level), or the surveys become too expensive if the sample size is extended.

To meet international standards of data quality and comparability, one method is to receive guidance from other countries. A good example of foreign intervention in Estonian data collection procedures is the survey on living conditions carried out in Estonia, Latvia and Lithuania in 1994 (Grogaard, 1996; Aasland *et al.*, 1997). This comprehensive study was initiated and carefully supervised by the Institute of Applied Social Research, Fafo in Oslo, Norway, and followed international standards and definitions. In 1999, NORBALT II was carried out in the Baltic countries and again the Fafo Institute offered considerable methodological support. The framework for NORBALT-II included the following guidelines:

- similar sampling rules and instructions;
- the same questionnaire, translated and back-translated, and a manual;
- the same point in time when the survey was carried out;
- the application of international definitions and comparable variables (on education, labour force, health, economic status and working conditions) (Aasland and Cesnūyte, 1997; Aasland and Tyldum, 2000);
- country baseline reports with similar lay-out of the tables, processed on the basis of the same syntax;
- a standard set of disaggregations (gender, age, region, household type, education, employment status) (Marksoo *et al.*, 2000; Svarckopfa, 2000).

The main support for further development of social indicators, social reporting and comparability in Estonia can be summarized as follows. Interest has been shown at government level in social indicators and comparability. Positive developments have occurred at the Estonian Statistical Office. Other factors include the small size of the country (1.4 million inhabitants, 45 000 km²); a

network of trained interviewers; extensive experience of comprehensive surveys (on living conditions, household budgets, labour force, applying international indicators and standards); acceptance of international definitions and openness to international datasets. In addition, infotechnology and electronic networks, as well as developing national registers, are seen as a good basis to meet international standards of data quality and comparability. Despite the progress made, no easy and straightforward solutions exist for ensuring that universal social indicators can be allied with immediate effects in transition countries. Uniformity of indicators does not, in any case, mean that cultural differences between countries are likely to disappear. Greater comparability of indicators may mean that differences are shown to be more salient. The search for uniformity may thus help to identify uniqueness.

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5. Spatio-Temporal Dimensions of Economic and Social Change in Germany

Dieter Eißel and Jeremy Leaman

While it shares common socio-demographic problems with other nations, Germany is also distinct from its European partners and from other countries in the IPROSEC project in a variety of significant ways. With 81 million inhabitants, it is by far the most populous of Western and Central European countries. Geopolitically and geoeconomically, Germany is at the centre of the newly constituted post-cold-war Europe. It has borders with nine countries, more than any other member state in the European Union, it straddles the major east/ west trade routes and is the main trading partner of most other countries in both Eastern and Western Europe, with whom it maintains relations of (significantly unequal) interdependence.¹

Germany's federal political structure involves an extreme separation of powers between a relatively weak centre and correspondingly strong and responsible regional and local authorities. A significant horizontal division of labour exists at federal level between Germany's federal government (qua fiscal authorities) and federal bank as monetary authority (now integrated in the European system of independent central banks).

As shown in Table 5.1, Germany's 16 regions differ both in territorial size and population from Bavaria (70.5 million km², 12 million inhabitants) to the city states of Hamburg (755 000 km², 1.7 million inhabitants) and Bremen (404 000 km², 663 000 inhabitants).

Within the federal fiscal system there are comparatively refined arrangements for both vertical and horizontal equalization of fiscal resources, aimed at neutralizing spatial disparities in unemployment, the distribution of household income and the provision of public goods (see Table 5.1 for the extent of horizontal equalization between regions). The operation of financial equalization is rooted in the commitment of the Basic Law (Germany's constitution, article 106) to guarantee 'uniformity of living standards' for all its citizens. The commitment is expressed in practice, both through the compensatory funding to finance direct transfer payments (like social benefit and housing benefit) and through the indirect subsidization of economic activity in poorer locations.

Having said this, important regional disparities persist despite financial equalization: firstly between the more prosperous (Catholic) southern states (Baden-Württemberg, Bavaria, Hessen, Rhineland-Palatinate) and the other 12 regions; and secondly between the *Länder* of the former Federal German Republic (FRG) and the five new regions resulting from the former German Democratic Republic (GDR) in 1990 (Brandenburg, Mecklenburg-Vorpommern, Saxony, Saxony-Anhalt, Thüringen).

Table 5.1 shows the marked differences between levels of unemployment and equalization receipts between East and West. The East/West disparity is utterly distinct and certainly not typical of the organically evolved structures of the former FRG. Indeed, the absorption of the GDR into the political economy and social structures of the West represents a major factor affecting both the objective situation of income and wealth distribution between households, as

well as the ability of inherited political structures to cope with such shocks. Few signs are to be found of real economic convergence between the five new *Länder* and the richer western *Länder*; their dependence on state and para-state transfers (pensions) from the West is set to last for between 30 and 80 years, depending on which trend scenario is adopted. This will inevitably place strains upon the operation of fiscal equalization, already in part reflected in the demand by the Federal Constitutional Court for the modification of equalization legislation by 2004. It is also significant that the voting strength of the separate regions (*Länder*) in the Upper House of the Federal Parliament (*Bundesrat*) does not truly correspond to their relative size or population.

Table 5.1 Regional diversity in Germany

Land (region)	Territory in km ²	Population in 1000s (density: total pop per km ²)	Voting strength in Bundesrat	Unemployment rate in % of working pop. (June 2000)	Recipient/provider of fiscal equalization funds +/- in DM Mill (1999)
Baden-Württemberg	35751.6	10476 (293)	6	5.1	- 3 426
Bavaria	70547.9	12155 (172)	6	4.9	- 3 118
Berlin	890.2	3386 (3804)	4	15.6	+ 5 316
Brandenburg	29476.0	2601 (88)	4	16.6	+1 147
Bremen	404.2	663 (1640)	3	13.0	+ 665
Hamburg	755.3	1704 (2257)	3	8.6	- 665
Hessen	21114.8	6051 (287)	5	7.1	- 4744
Mecklenburg-Vorpommern	23171.0	1789 (77)	3	17.3	+ 921
Lower Saxony	47613.5	7898 (166)	6	9.0	+1037
Northrhine-Westfalia	34079.8	17999 (528)	6	9.0	-2 578
Rhineland-Palatinate	19846.8	4031 (203)	4	7.1	+ 379
Saarland	2570.2	1071 (417)	3	9.6	+ 294
Saxony	18412.8	4459 (242)	4	16.6	+ 2 149
Saxony-Anhalt	20446.8	2648 (130)	4	20.0	+ 1 300
Schleswig-Holstein	15768.8	2777 (176)	4	8.1	+ 174
Thuringia	16171.7	2449 (151)	4	14.9	+ 1 218

Sources: Statistisches Bundesamt, Bundesanstalt für Arbeit, 2000.

Northrhine-Westfalia has only twice as many votes in the *Bundesrat* as Bremen but has a population 26 times larger than the city-state. The favouring of smaller states is a reflection of both Allied and German concern after the Second World War about the territorial domination of larger states like Prussia in Germany's past, and demonstrates the will to protect smaller, weaker units.

Financial disparities

Within the fiscal structures of the German state, local authorities bear considerable responsibilities both for the maintenance of the state's infrastructural facilities and for the provision of the main pillar of state social welfare (*Sozialhilfe*), which covers those citizens not adequately protected by the country's social insurance schemes. A brief examination of the disparities in the revenue and expenditure of local authorities in Germany provides an insight into the significant asymmetry of Germany's state finances, which directly or indirectly affects the latitude of state authorities to pursue active policies in support of women, families and private households.

The tax-raising potential of East German local authorities is visibly worse than their West German counterparts. This applies in particular to revenues from the local Business Tax. In 1999, East German local councils were able to raise an average of 283DM per inhabitant from this source. Average revenue in the West from this tax was, by dint of the higher earning capacity of its resident enterprises, around 1050DM. Clearly, considerable differences also existed among western local authorities. Frankfurt am Main, as Germany's major financial centre, raised 3732DM per inhabitant and the industrial cities of Wolfsburg, Ingolstadt and Ludwigshafen generated between 3439DM and 2227DM from the tax, whose rate can be altered by individual local authorities.

Table 5.2 Local government revenue and expenditure per inhabitant in 2000 (in DM)

	West German local authorities	East German local authorities
<i>Revenue</i>		
Taxes	1 500	598
Service Charges	455	313
Recurrent Grants	897	1 494
Capital Grants	158	498
Other Revenue	767	662
<i>Expenditure</i>		
Personnel	1 008	1 060
Consumables	716	697
Social Services	749	491
Investments	598	804
Other Expenditure	716	576

Source: Deutscher Städtetag, 2000, p. 87.

Duisburg, on the other hand, produced only 526DM per head but still more than East German cities (over 2 000 000 inhabitants). Western cities (with over 500 000 inhabitants) reached an average of 1387DM of Business Tax revenue per head. The top result in the East was the ('only flourishing') city of Leipzig. The other East German cities managed between 200DM and 400DM from this source. This is a clear result of the decline of industry in East Germany (Deutscher Städtetag, 2000, p. 87). Overall, East German local authorities were only able to cover 5.4% of their expenditure from Business Tax revenues (net after central and regional levies have been subtracted). The corresponding ratio in the West was still some 15.3%. Furthermore, the share of East German local authorities in other tax revenues is less because of higher unemployment levels, since individual tax revenues are calculated according to the actual payments in the locality, whereas these do not apply in the case of unemployment. East German local councils will be dependent for years on supplementary grants provided by the West (Deutscher Städtetag, 2000). It is likely to take a very long time to effect a significant improvement in this situation.

It is clear from Table 5.2 that the latitude for local government expenditure is constrained by weak revenue raising powers; while West German local authorities raise over 70% of their revenue and receive only 27.9% in recurrent and capital grants from regional and central government, East German councils rely on higher authorities for 54.9% of total revenues. The poor state of East German local infrastructures (local transport, water and sewage systems in particular) obliges local councils to spend a higher proportion of their revenues on capital projects; social expenditure per head of population is – despite higher levels of poverty and deprivation in the East – less than two-thirds of West German levels.

Labour market disparities

The sudden opening-up of the GDR economy to the world market as a result of the German Currency Union of 1 July 1990 and then the enormous and historically unique structural change have contributed to a destruction of jobs in immense proportions. The rapid absorption of East Germany into the economic territory of West Germany by means of a currency reform that paid no heed to disparities of productivity immediately landed enterprises in the East in a ruinous situation of competition (Hickel, 1993). Under these conditions and in view of out-of-date technical standards, the industrial companies of the old GDR were not a match for the competition and, as a result, collapsed along a broad front. A number of additional, special factors have to be taken into account: the relatively strong interlocking of the GDR-economy with the former COMECON states, in particular its exports to these countries in Central and Eastern Europe evaporated because of the latter's payments difficulties; the abrupt decline could not be compensated by increased exports to the West.

In addition, they suffered considerable sales losses in their own domestic market. In the initial stages at least, the East German population rejected many of their own products and purchased goods from the West, in part probably as a result of successful television advertising. The mirror image of the increasing levels of capacity utilization in West Germany's consumer goods industry was the corresponding collapse of domestic sales in the East and of employment in

the affected branches of East German industry. The number of new ventures and investments was insufficient. East Germany's GDP fell by 22% in 1990 and by 28% in 1991; industrial production dropped by a full two thirds in the same period (Eißel, 1993).

This rapid decline in the fortunes of industrial businesses is not just the result of hard economic facts like obsolete plant and machinery and thus poor competitiveness, but rather the consequence of the influence of (largely West German) competitors who took advantage of the favourable situation. In the process of privatization, or the sale of enterprises controlled by the *Treuhandanstalt*,² conglomerates were as a rule broken up, the service elements separated off and the level of vertical concentration reduced. In contrast to the original intentions prior to purchase, this dismemberment of companies was used by West German competitors as an opportunity to acquire the lucrative parts of companies, such as the sales departments (including client lists), foreign agencies, service teams and research centres. The core business remained in the hands of the *Treuhand*. According to the Deutsches Institut für Wirtschaftsforschung:

This produced a situation which threatened the very existence of the enterprise. To start with, the sales system had to be completely rebuilt and an independent research base had to be created. In addition new business links to supplies had to be created. (Deutsches Institut für Wirtschaftsforschung, 1992, p. 482).

There has to be some doubt about whether a whole region like East Germany can have an economic future without a manufacturing sector, in other words whether it could only function as a service sector in Central Europe. Overall this development created a situation where, three years after the wall had come down, the number of people in employment in the East had fallen from 9.7 million to just 6.7 million, of which some 3 million were women (Statistisches Bundesamt, 1999). The latter figures relate to the fact that the erosion of former provision of company kindergartens and after-school clubs robbed many women, in particular single mothers, of the opportunity to continue with or take up employment, if – in the case of a patriarchal family structure – they have small children.

In addition, a gender-specific competition for employment is taking place, in which women are marginalized, despite their higher preference for careers, compared to their counterparts in the West, and can clearly be marked down as the losers in the process of unification. Barbara Bertram (1993, p. 32) has suggested that, in all areas of economic and social life 'a massive marginalization of east German women by men from East and West Germany, and in part also by women from the old FRG, is underway'.

Secondly, the statistics concerning registered unemployment are made to look better than they are, because of a variety of active state labour market policies. In July 1992, for example, the official number of unemployed in the East stood at 1 123 000 (14.2%), but a further 1 438 000 were either on 'retraining schemes' (about 504 000), or job-creation schemes (389 000), or recipients of 'transitional payments' for early retirees (545 000). This produces an effective rate of unemployment of 33.6%. The dramatic disappearance of 3.3 million jobs (or 34% of all jobs in 1989) occurred in just these first three years after unification. Last but not least, many workers – notably those with skills – migrated to West Germany.

Of greatest concern in this context is the erosion of jobs in the industrial sector. Engineering, textiles, clothes manufacturing and the electro-technical industry, those branches of the economy which also had a relatively high export ratio, almost collapsed completely. The only branch of industry that has maintained a better position is that of foodstuffs. After initial high penetration by West German imports, this sector is now supplying the domestic market more extensively, as well as the construction industry with its associated supply branches like special steels and aggregates.

As stated above, serious doubts can be expressed as to whether a whole region like East Germany can survive without its own manufacturing industry. The EU has recognized all five eastern *Länder* as 'Objective 1 Regions', that is regions with a high degree of underdevelopment. Thüringen, for example, was put in the same category initially as the poorest region in Greece. East Germany benefited to the tune of 27 billion DM with agreed increases from the Structural Fund in the period from 1994 to 1999. This helped towards the improvement of location conditions, but did not recreate a multifaceted industrial landscape in East Germany.

The greatest differences between East and West Germany can be seen in the regional structures of unemployment. While differences in the relative rates of unemployment narrowed up until 1995 (West: 8.3%; East: 14%), the second half of the 1990s saw a renewed widening of both economic growth performance and corresponding unemployment rates. By September 2000, East German rates (16.6%) were again over double those in the West (7.2%) (Deutsche Bundesbank, January 1997, p. 14, and October 2000, p. 7).

A particular problem in East Germany is posed by the very high level of unemployment among women. Women in the West are also disproportionately affected by unemployment. However, in the former GDR women had always manifested a quite distinct career biography. Employment among women was the social norm in the GDR before unification, including women with small children. Even after unification, the social acceptability of female employment continued to be very high in both parts of Germany, but was far more pronounced in the eastern *Länder*, as reflected in the figures shown in Table 5.3. More than 90% of all women were economically active prior to unification. They thus not only contributed to the maintenance of the family, but they were more strongly bound into the world of work than their West German counterparts, in terms of their structures of communication.

Table 5.3 Female employment ratios in Germany, 1991–98

Year	West		East	
	Women	Married Women	Women	Married Women
1991	38.9	47.2	50.0	73.0
1993	39.3	48.2	47.7	68.9
1995	39.2	48.4	48.4	68.9
1997	39.6	49.2	48.5	67.7
1998	39.7	49.4	48.6	67.1

Source: Statistisches Bundesamt, 1999, part 1, p. 88. p. 481).

Both factors have certainly contributed to the perception that the loss of these career and contact opportunities are now perceived with such hardship.

As a result, the difference between women in the West and the East is considerable. Thus, in 1998, 21.8% of women in East Germany were unemployed; in the West, by contrast, it was only 10.3%. To improve their labour market opportunities, many women in East Germany have had themselves sterilized, according to press reports. The existing 'flaw' of having children – as perceived by many an employer – was thus removed.

As a result of long cherished socialist objectives and socialization in the East, and because of long-term shortages of labour in the former GDR, identical career biographies for men and women are virtually taken for granted. It was also more clearly possible to combine career and family because of the state and company provision of *crèches*, kindergartens and after-school clubs. In West Germany in 1993, 60% of women between 18 and 65 years old were housewives, and only 9% were unemployed; the comparative figures in East Germany were 41% unemployed and 8% housewives. This situation hardly changed in the course of the 1990s. When asked about their intentions with regard to employment in the following three years, 31% of West German and 89% of East German women answered 'yes'. By 1998, however, the situation had changed considerably: 40% of West German women compared to 66% of East German women were actively expecting to seek employment. This shift is certainly linked to the far worse employment prospects in the East: when asked whether it was easy to find a job, 25% of West German women but only 4% of East German women agreed. Clear evidence can be found of discouragement effects, resulting from their quite distinct situations. This is accordingly mirrored in responses to the question about the fear of being made unemployed. In East Germany, the fear is three to four times higher than in the West (*Wohlfahrtssurvey* 1993, 1998, quoted in Statistisches Bundesamt, 1999, part II, p. 481)

The expectation that the negative view resulting from job losses can be overcome in the short term by the emergence of new jobs, by inward investments and by the creation of new firms remains illusory for the foreseeable future. Recovery from the deep slump will be difficult and lengthy. In view of the fact that productivity is a third lower than in West Germany, production in East Germany would have to treble if it were to achieve the original levels of industrial employment in East Germany. This will certainly require a process of alignment that will take decades, if it can be achieved at all (Becker, 1992, p. 462).

Income disparities

Predictably, inter-regional disparities of economic activity and unemployment are paralleled by personal income disparities between the richer western *Länder* and the five new regions of East Germany, together with the eastern half of Berlin. However, it is important to draw attention to overall income trends within Germany (and most other OECD countries) since the early 1980s, which indicate consistent shifts in income distribution in favour of income from capital and away from income from labour. Between 1980 and 1988, the profit ratio (ratio of profit income to national income) rose by 6.9% in Belgium, 5% in Germany, 4.7% in Spain and France, 5.2% in Ireland, 4.3% in Luxembourg,

6.7% in Holland, 4.3% in Portugal and 5.8% in Britain (but only 1.1% in both Denmark and Italy) (Eurostat National Accounts, 1991, own calculations). This functional distribution of income is also mirrored in the declining proportion of national income at the disposal of the lower quintiles of German households and in a deteriorating Gini-coefficient.

If the situation of East German households is added to this overall account, a more complex picture emerges, as shown in Table 5.4. The disparity between both categories of income narrows; the ratio of average market income per household in East Germany to that in West Germany falls from 0.5 in 1991 to 0.7 in 1997. However, the ratio of disposable income, after compensatory measures by the state have been factored in, rises from 0.54 to 0.81. Table 5.4 also shows the degree to which redistribution has penalized the growth of household income in the West. Average household disposable income has risen very slowly in absolute terms; the ratio of disposable to market income is unfavourable (0.88), while the reverse applies to household incomes in the East (1.01). The Gini-coefficient for market incomes rises in both East and West, from 0.4162 to 0.4480 in the West between 1991 and 1997 and from 0.4013 to 0.4787 in the East, reflecting a marked deterioration in income distribution in the East (Grabka, 2000).

Table 5.4 Market income and disposable income* in Germany 1991–97, median levels per annum (in DM)

Year	Market Income			Disposable Income		
	Germany	West	East	Germany	West	East
1991	34 505	38 258	19 105	31 143	34 202	18 589
1992	36 393	40 071	22 643	33 063	35 620	22 427
1993	38 123	40 807	26 818	34 661	36 545	26 726
1994	39 027	41 581	28 912	35 482	37 265	28 416
1995	40 441	43 149	28 860	35 817	37 493	28 651
1996	40 666	43 104	30 134	36 570	37 987	30 451
1997	41 006	43 389	30 693	37 149	38 534	31 156

* Disposable income after state redistribution measures

Source: Grabka, 2000.

Table 5.5 Childcare provision in East and West Germany, 1994 (in %)

	East Germany	West Germany
Crèches (0–3 year olds)	41.3	2.2
Kindergarten (3–6 year olds)	116.8	85.2
Kindergarten (3–6 year olds) all day including lunch	97.0	17.0
After-school club (6–10 year olds)	59.7	5.1

Source: Deutsches Jugendinstitut, 1998.

Spatial disparities in childcare facilities

While the common disparities of childcare provision, shared with other countries, also exist in Germany – for example between urban and rural communities – the East/West divergence is particularly marked (Kreyenfeld and Hank, 1999). It can be seen in both household expectations and public provision of places for children of pre-school and school age, as illustrated by Table 5.5. As has been noted above, childcare provision in the GDR was comprehensive, in large measure because of the need to mobilize female workers in the face of severe labour shortages, but it created a set of cultural attitudes within the East, which have persisted beyond unification in 1990 and are likely to persist for so long as the generations socialized in the GDR are moving through their careers.

The state in the federal republic is only legally obliged to provide kindergarten places for all those that demand it, namely for childcare provision. After-school clubs are not mandatory. It is particularly noteworthy that, while there was a marked hemorrhage of childcare facilities in the East after 1990, provision remained consistently above that of the West. This is particularly marked in all-day provision in *crèches* and kindergartens, as well as in after-school clubs (see Table 5.3).

More recent data have confirmed the continuing higher rate of usage of public provision in the East for both 0–3 year olds and 3–6 year olds (21% and 74% respectively) compared to the West (5% and 57%), as well as a greater willingness to pay for such facilities. In the East, 92% of working mothers are prepared to pay for *crèche* facilities, 94% for kindergartens (84% and 80% only in the West), and mothers in the East are prepared to pay more for such facilities, as shown by the data in Table 5.6.

Disparities in fiscal and labour market income, and in childcare provision between and within East and West Germany will undoubtedly affect both the demand for and the provision of facilities within the united German territory. They make generalized conclusions on either social attitudes or on state policy formulation more difficult to produce than in countries that have not undergone the economic, political and social upheaval arising from unification.

Table 5.6 Willingness of working mothers to pay for childcare, 1995 (in %)

Age of child	West Germany		East Germany	
	0–3	4–6	0–3	4–5
ODM per month	16	20	8	6
Up to 200DM	45	54	39	54
200–400DM	28	34	36	34
400DM and more	11	6	17	6

Source: Engelbrech and Jungkunst, 1998.

Endnotes

1. Germany's smaller neighbours are thus dependent on Germany for a larger proportion of their imports and export markets, rather than *vice versa*; for example. Roughly 40% of Austria's imports and exports are with Germany, while the converse ratio is only 4%.
2. The privatization of East German enterprises was conducted under the auspices of this 'Trustee Agency', which was appointed as an all-embracing holding company with the task of disposing of its 'assets' as quickly as possible.

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6. Spatial Aspects of Socio-Demographic Change in Italy

Devi Sacchetto

Italian demographic trends have taken a peculiar turn, as the fall in the birth rate has become characteristic of the entire country. Public concern about population ageing generated by the decreasing birth rates, has not resulted in a reversal of the trend. At the same time, the number of marriages has also been declining, while a greater diversity of family patterns has been emerging.

While declining birth and marriage rates and increasing diversity of family types characterize Italian demographic trends, national data conceal subnational differences that divide the country. Regional differences in behaviour have remained strong since the 1970s, dividing Italy between the north and south, and the city from the countryside. The north has pioneered demographic changes, but more recently, changes experienced in the south have become more dramatic and intense. The reasons for the different patterns are many and varied. A variety of social, cultural, and economic circumstances have affected family formation and decisions about the reproduction of human life.

The purpose of this paper is to highlight the subnational variation in socio-demographic change in Italy. The paper begins by sketching the geographical features of Italy that influence the population distribution of the country. The paper goes on to discuss the ways in which socio-demographic trends have taken shape across space and time, and it looks at reasons for these shifts. In conclusion, the paper argues that some measures have been taken in Italy in response to its very complex socio-demographic scene, but that there is room for greater policy intervention at a subnational level.

The physical geography of Italy

To gain a fuller understanding of socio-demographic change it is important to consider Italy's peculiar physical geography. The country has a relatively high population density compared with the rest of Europe, which dates back to a period of intensive agriculture. Since the early decades of the twentieth century this type of agriculture has given way to a slow process of industrialization, which accelerated after the Second World War. This industrialization centred in the northern regions and the population clustered there, with 70% of the population concentrated in just one third of the national territory. The physical characteristics of the Alps in the north, and the Apennines running through central and southern Italy, explain this northern spatial clustering of the population. In addition, the north borders several developed countries, such as France, Switzerland and Austria, with whom Italy could trade. Half the total population of Italy lives in the Po valley (Pianura Padana), which is situated between the Alps and the Apennines.

As well as a northern clustering, there is also a dispersal of population towards the flatter coastal plains. The Apennines form the central spine of Italy and this mountain range pushes the population onto the lower lying coasts and plains, such as areas around the large cities (Rome, Bari) and the Campania

plain near Naples. The internal areas near the hills and mountains are less populated, in particular in central and southern Italy. The two major Italian islands, however, show a particularly different situation: Sardinia is sparsely populated, while Sicily has a high population density, probably because of Sardinia's mountainous terrain, chequered political past and former links with Spain, and Sicily's flatter terrain and closer proximity to Italy.

Rural to urban migration intensified after the end of the Second World War, resulting in the growth of urban settlements, but this trend diminished towards the end of the 1980s. Throughout the 1990s, people have been leaving big cities to live in small and medium-sized towns, near large metropolitan areas. As a result, the number of settlements with less than 20000 inhabitants has grown, particularly because of the better living conditions in small cities that have attracted growing numbers of commuters (Menniti and Savioli, 2000, pp. 4–5).

Family formation

In Italy in the 30 years following the Second World War, the process of modernization moved the country towards urban concentration and mass schooling. This process strongly influenced demographic patterns, but at the same time it created insecurity and discomfort. In Italy between 1971 and 1973 an increase in the wealth index (+37.5%) was accompanied by an increase in the discomforts index (+6.7%) (Casula, 1999, p. 31). The rate of demographic growth has continued to decline. In 1998, it was 0.9 per 1000 inhabitants, the third lowest percentage in Europe, just above Sweden (0.8) and Germany (-0.2) (Censis, 1999). The low population growth rate can be understood in part by the falling birth rate. In 1970 the birth rate was near the EU average (2.42 children per woman), but in 1983 it had fallen to 1.49 and by the end of the 1990s it was 1.18 (compared with an EU average in 1997 of 1.44) (Eurostat, 1999, table J-11). The probability of having a third child decreased constantly in the 1990s, with the result that each couple has one or at most two children.

However, the rate of decline has varied from one part of the country to another. In northern Italy, the birth rate was 1.91 per woman in 1975, and by 1998 it had declined to 1.07. In the same period, the birth rate in central Italy decreased from 2.0 to 1.08, while in southern Italy the fall in the birth rate was even more dramatic: from 2.72 per woman to 1.41. While the birth rate in southern Italy is higher than in the other regions, the rate of decline has been more intense and much more rapid than elsewhere, with greater consequences for those living in the south.

Modernization has also been characterized by the increasing age of women at the birth of their first child, which has also contributed to the reduction in population growth rates, since women who delay childbirth generally have fewer children. While this is a national phenomenon, again the degree of change varies across regions. In 1975, the average age of a woman at the birth of her first child was lower in central and northern Italy than in southern Italy (27.3 compared with 28.2 years). By 1998, however, there had been only a small increase in the average age in the south (28.7 years) but a more accentuated delay in the central-northern region (30 years), reflecting the impact of modernization and urbanization on demographic patterns.

The marriage rate for Italy follows a similar trend as both the increase in the average age of women at the birth of their first child, and the declining birth rate. Given that 90% of children in Italy are born in wedlock, the change in marriage rates is directly associated with changes in birth rates. Italy has witnessed a decline in the marriage rate from 7.3 in 1970 to 4.8 in 1999. As well as a decline in the marriage rate, the average age of people at their first marriage has increased from 27.4 in 1970 to 30 in 1999 for men, and from 23.9 in 1970 to 27 in 1999 for women. In the south of Italy in particular, although the marriage rate remains higher than elsewhere (5.3), the rate of decline has been most rapid (Istat, 2000a; Menniti and Savioli, 2000, pp. 4–5).

Cohabiting couples account for only 2.3% of all couples, which is a relatively small proportion, but the geographical distribution of cohabitation differs between north and south. In Val d'Aosta, Emilia Romagna, Friuli and the province of Bolzano, as well as the large metropolitan centres, all in northern Italy, while the rate is still small compared with the rest of the EU, there are more unmarried couples (Sabbadini, 2000, pp. 32–33). About half of unmarried couples have no children; they are young, have attended a high school or university and the woman works outside the home.

Another phenomenon which became significant in the 1990s is the growth in the number of lone-parent families, usually mothers with one or more children (Sabbadini, 2000). There were 70 000 lone-parent families in Italy in 2000: 16.5% were fathers and 83.5% were mothers (Bimbi, 2000; Istat, 2000b). Lone-parent families constitute 8.1% of Italian families, with a particular concentration in north-western and central Italy, involving almost 12% of the population.

The declining birth rate, the increasing age of women at childbirth, the declining marriage rate, and increasing cohabitation rate and lone parenthood are contributing to the rapid decline in population growth rates. The reasons for these trends, as well as their different geographical distributions, are complex. Some experts believe that they are associated with the rapid rate of modernization experienced in Italy in the late 1960s, which has led to the breakdown of cultural and reproductive patterns that were typical of the 1950s and 1960s. Other factors include high internal migration rates, the liberalization of sexual behaviour, the diffusion of contraceptives, legalization of divorce (1975) and abortion (1977), and the crisis of the family role (Pedemonte and Tagliasco, 1996; Ginsborg, 1998).

Some patterns of behaviour have taken on a peculiar significance and importance: the abortion rate fell constantly from the early 1980s (from 15.8% in 1981 to 9.3% in 1999), while the rate of divorce and separation accelerated over time (though remaining well below the EU average) (Menniti and Savioli, 2000 pp. 4–5). The decrease in the number of marriages has been concomitant with a decline in the stability of marriage. In Italy, 2 million people are either separated or divorced (3.3% of the total population); most of the separations (66%) and divorces (55.4%) involve at least one child (Istat, 2000a). In 1997 one separation and 0.6 divorces were recorded per 1000 inhabitants. Marriage instability has been most prevalent in north-west and central Italy, while, in contrast, the south continues to have a high rate of marriage stability. With an intensification of the secularization of Italian life, registry office marriages accounted for more than one fifth of the total (21.4%).

Moreover more people have been contracting a second marriage (Menniti and Savioli, 2000, pp. 4–5).

Perhaps the most convincing argument explaining changes in family formation patterns has been proposed by Dalla Zuanna (1995 pp. 111–18). He argues that the changes in family formation, particularly the declining fertility rate, are a consequence of the growing affluence of individuals who are seeking upward mobility for themselves and their children. In order to realize this upward social mobility, the number of children in such aspiring families must be limited, resulting in the declining birth rate, as families become more affluent. This trend appears to be stronger in the north (in particular in the north-east), which is the most affluent part of the country and where a larger proportion of the population can hope to become more affluent. It would not be a sufficient explanation for declining fertility rates elsewhere, however.

In the south, the decision to have fewer children is linked to the attempt by couples to cope with the effects of modernization, rather than to be 'modern'. Since modernization has not completely and positively influenced the south to the same extent as the north, economic and social conditions have deteriorated. Couples have decided to limit the number of children they have because of financial constraints. Differences in fertility rates between north and south are, therefore, explained on the one hand by family aspirations in a more affluent society, and on the other hand by financial constraints in a less affluent economic climate.

Spatial differences in family formation patterns in Italy must also be understood in relation to the cultural transformations that have taken place in family relationships and the individualization of society. These transformations were brought about by greater female autonomy and a move away from traditional cultural patterns, which had regulated motherhood in the past, as well as by a crisis in the male role. This was reinforced by the increase in women's educational achievements during the 1990s.

Women's longer years of education have meant a change in their attitudes in favour of a more active economic and social life. During the 1990s, the prevailing experience for women – above all in the centre and north – was that of combining economic activity outside the home with raising small children: more children aged 0–4 years have a working mother than a mother who is a housewife (46% compared with 43.3%). Furthermore, 40% of all children aged under 13 years have two working parents (Istat, 2000b).

Nonetheless, while women working outside the home are having fewer children, women tend to leave the workforce on the birth of a child (despite the large number of laws to protect working mothers). According to data from the Ministry of Labour, 12 000 women per year left the labour market between 1991 and 1995, increasing to 13 000 between 1996 and 1997 and 14 000 in 1998. In Veneto, the number of women leaving the labour market is greater than 20%; in Lombardy, Trentino and Emilia Romagna the percentages are slightly lower (Istat, 2000b, pp. 173–5). The higher incidence of women in the north leaving work to have children is predictable, since the north has a large number of women workers.

The decision to have fewer or no children, or to have them at an older age, is linked to personal preference and job flexibility for both women and men, who have other commitments outside the home. Furthermore, the uncertainty of future prospects for those entering the workforce, and a growing

fear of becoming parents, because of the responsibility for others and lack of autonomy that parenthood brings, has tended to encourage the individualization of society rather than family life, at least among the young (Censis, 1999).

In response to the changing role of Italian women in the workforce and in society at large, and the negative impact this is believed to have on family life, the Catholic Church has advocated the need for women to appreciate their irreplaceable roles as mothers, and has recognized a 'social reevaluation of maternal duties' (Giovanni Paolo II, 1998, pp. 44–5). The Church, when confronted with the growing trend among women to work outside the home, uses the language of work to define the family as 'a community which is based on work and the first working school for each man' (Giovanni Paolo II, 1998, pp. 22–3 Giovanni Paolo II, 1991, pp. 58-59. In addition, the Catholic Church has proposed to give greater social protection than do social services to the children of women who decide to have a family. At present, social services mainly provide help to mothers who work rather than to all women with children. The Catholic Church plans to provide help to all women who choose to have a child, particularly those who are full-time mothers.

Emancipation within the extended family

In Italy, the length of time children continue to live in the parental home has been increasing. A consequence of this trend has been the postponing of all steps leading to adulthood, such as cohabiting, security of employment and the birth of children (Saraceno, 2000, pp. 225–34). Throughout the 1990s, the number and age of children living in the parental home increased. In 1998, for example, almost 60% of young people between 18 and 34 still lived with their parents. This figure can be broken down: 90% of the population aged 20–24 still live with their families; 60% of those aged 25–29; and 22% of those aged 30–34. They make up a group of 8.3 million people (Ginsborg, 1998, pp. 146–7). Intergenerational cohabitation is delaying family formation considerably, as the parenting figures of young people demonstrate: the number of young people (between 25 and 34) who are parents has decreased to 35.4%, compared with 51.6% at the beginning of the 1990s, while the number of parents who are younger than 25 has decreased from 4.7% to 2.1% during the 1990s (Istat, 2000b, pp. 173–5). This extended stay in the parental home, the delay in marriage and child birth, have important consequences for the demographic situation of the country.

The reasons for staying longer in the parental home, which concerns those born at the beginning of the 1970s in particular, differ between north and south and between socio-economic groups. In the south, it is the unemployed, young people and students who decide to live with their parents, and they tend to have their own families and their own homes as soon as they become economically independent.

In the south, therefore, economic reasons underpin the decision to live in the parental home. This was particularly true in the 1980s and 1990s, when southern Italy was experiencing an economic crisis (Pugliese and Rebeggiani, 1997). In the northern and central regions, this phenomenon concerned young people who were already working (Ginsborg, 1998; Bocciarelli, 1999), and hence the reasons for staying in the parental home in the north are not strictly

economic. In central, and particularly in northern Italy, living with parents is a strategy – accepted by all the family members – that lasts for a fixed period of time (Saraceno, 2000, pp. 225–34).

This strategy can be explained as a way of providing mutual support within the family group. In Italy, and particularly in central and northern regions, families have developed a process of mutual and practical assistance, which promotes the idea of the family as a ‘firm’ to which each generation brings its contribution (even if the old breadwinner, the head of the family, no longer commands the same amount of power as in the past) (De Rita, 1998, pp. 383, 416). Young people see the family as an agency which gives them the opportunity to reach adult life while gaining access to upward social mobility. Sons tend to delay taking up their responsibility in the management of their daily life, while daughters seem more interested in investing time in securing their future marital relationship (Saraceno, 2000, pp. 225–34).

The decision to stay in the parental home for longer is, in some cases, encouraged by parents. Their concern over the future of their children, particularly those with high expectations for their offspring, causes parents to discourage their children from leaving home (Dalla Zuanna, 2000, pp. 235–53). The belief is that, by postponing responsibilities, youngsters will be able to become more secure and independent under the protection of the family home, which, in turn, will guarantee success in later life.

However, despite parental protection, parents do not transmit values such as responsibility and autonomy to their children. Instead, they convey a sense of insecurity about life and work, which, as indicated above, is a strong feature of Italian society reported in the 1999 census. At the same time, parents’ heightened expectations for their children, associated with the prolonged stay in the parental home, have not been met. Dissatisfaction, disillusionment, uncertainty and insecurity have been the result for many.

While Italian families are still characterized by the presence of more than one generation in the same house, the average number of members is diminishing. In addition, throughout the 1990s the number of alternative family forms increased, particularly one-person households and nuclear families. This change is due, in part, to the historical transformations Italy has undergone. In the centre and north in particular a ‘family scattering’ (different family members that live separately but in close spatial proximity) has occurred. The south is characterized by nuclear families (families made up of couples with children), and these account for 54% of all households. In the centre and the north-west, the equivalent figures are 41.5% and 42.3%, and a greater variety of family forms can be found (Ginsborg, 1998).

Cultural transfers between north and south

The changing demographic patterns in Italy also need to be understood in the context of internal migration patterns, which are bridging the gap between north and south and ushering in marked changes, especially in the south. During the 1980s and 1990s the persistent economic crisis was most severely felt in the south, which, as well as contributing to the declining birth rates discussed earlier, compelled many young people to move from southern Italy to find work in the north. From the beginning of the 1990s, therefore, migration flows from the south to the north of Italy were revived. Although these flows hardly

resemble the old southern migration, recent calculations by Svimez (2000), a Public Research Institute, shows that 60 000 people left the southern regions for the north every year between 1996 and 1999.

Migration from the south seems to be characterized by temporary migrants, who prefer not to move permanently to the northern areas, where it has become particularly difficult and expensive to live. Since migrants are predominantly adult men who postpone their age of marriage or who live far from their families for long periods, the impact of this trend on the formation and constitution of families cannot be ignored. Similarly, the cultural divide that exists between north and south is becoming narrower as the flow of migrants continues between these areas, bringing with them cultural traits from different regions. This cultural change must also be included in an understanding of the regional variations in socio-demographic change.

Implications for policy actors

As shown in the paper, socio-demographic change in Italy has followed certain trends, but the rate and pace of change differ between regions across the country. The birth rate has declined, especially in the south; the age of women at the birth of their first child has increased, especially in the north; the marriage rate has declined, especially in the south; the rates of cohabitation and lone parenthood have increased, especially in the north, and the length of stay in the parental home has been extended in both the north and the south. The reasons for these transformations across space and time also differ. Modernization, since the 1960s in particular, has been important throughout Italy, but especially in the north where industrialization and urbanization, the individualization of social life and the emancipation of women and young people have been most pronounced.

In the south, the effects of modernization on family formation have taken longer to materialize, and the impact of the economic crisis has been most severely felt due to the north's economic advantage over the south. Traditional values and customs in the south have also meant that socio-demographic changes, such as the growth of lone parenthood, cohabitation, divorce rates and abortion rates, have been less significant than migration in influencing demographic change. Policy actors are, therefore, faced with problems that might appear to be identical on the surface, such as a low demographic growth rate, but whose roots are so complex that a universal solution to the problem is difficult to achieve.

Despite a Christian-democratic government for many years, supported by the Catholic Church, services encouraging family formation and reproduction have always been limited. Paid maternity leave and the low level of family allowance, for example, have never created the base for an effective policy to support maternity. In 1994, a Ministry for the Family was instituted for the first time by the centre-right government, under Silvio Berlusconi. In 2000, the government passed a bill granting leave to fathers at the birth of their child. Despite the Ministry's efforts, however, few fathers have applied for paternity leave because persistent cultural and economic models discourage this relatively new practice. The absence of state intervention does not explain the reduction in fertility rates but it helps to explain why the Catholic ideology

shifted in favour of preserving family values and promoting the idea of a woman as 'the angel of the home'.

During the 1990s, local policy actors paid increasing attention to socio-demographic trends, in part because of a certain amount of fiscal devolution. In theory, the ability to target the policy needs of particular regions consequently has potential for development. In practice, however, fiscal devolution has penalized the poorer regions of southern Italy while favouring several rich northern local administrations. Problems in the south that require policy intervention, therefore, receive limited funds, which may, in fact, do little to ease the problems and diminish the north/south divide.

Public policies seem unable to keep abreast of the rapid socio-demographic changes underway, not least because of the variety of regional differences exhibited in Italy. This is a serious problem for Italians, particularly because, in the past, the Italian family was well known for its ability to mitigate the deep economic inequalities and to promote the social and economic growth of its members. In the twenty-first century, however, it is unable to fulfil this role because the family's economic and social power has diminished. With a situation in which it seems unlikely that the Catholic Church or families themselves can find solutions to family problems, state intervention is a justifiable response. Policy actors need to pay more attention to socio-demographic change and to the absence of adequate national and local welfare services to help parents reconcile work and family life, since these factors seem to have discouraged family formation. A more developed fiscal system, coupled with policy measures, is required to replace the role that the Italian family once had as a casual source of welfare to enable families to cope with recent socio-economic changes.

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7. The Roma (Gypsies) in Hungary

Ágnes Kende

Some time in the first millennium, the Gypsies arrived in southern Europe from India, but it was in the fourteenth and fifteenth centuries that larger groups first arrived in Hungary. Today, out of 38 European countries, Hungary is in fourth place behind Romania, Bulgaria and Spain as the country with the largest number of Gypsies within its borders. They represent the largest minority among all the minorities living in Hungary today. Recently the use of the word 'Roma' from the Romani language has partly replaced the previously homogeneously used *Cigány* (Gypsy). In various forums of social discourse – such as political discourse, journalism, mass media, or public language – the name derived from the group's own Romani language is used. This duality can be found within Gypsies' organizations, civil movements, and self-governments. Minority self-governments, which are based on Minority Law, and the Democratic Association of Gypsies of Hungary use the term Gypsy. However, there is also a Roma Parliament, and a Roma Human Rights Foundation. The issue of naming has not become a political question in Hungary as yet; no Gypsy has publicly demanded to be called Roma instead of Gypsy. Throughout this paper, the two terms are used interchangeably.

In the 1990 census, 142 683 Hungarian citizens declared they were of Roma nationality (Ministry of Foreign Affairs, 2000). Researchers generally do not accept this number because it is based on self-definition and collected only once every ten years. According to the most comprehensive and representative research on Gypsies (Kemény, 1998), about half a million Gypsies live in Hungary, thus 5% of the population can be considered Gypsy. Since ethnic data are not recorded in Hungary, all data derive from estimates made in sociological research. In 1993, 12.4% of the total number of children born in Hungary were Roma. For centuries Gypsies in Hungary have been excluded and persecuted, and their experiences throughout the generations is etched into their collective subconscious. This paper will demonstrate how Gypsies' exclusion remains a topical issue in contemporary Hungarian society, and a debate relevant to an understanding of socio-demographic change and policy decisions.

The paper begins by presenting the demographic situation in Hungary to illustrate the contrast between Gypsies and the Hungarian population, particularly in terms of poverty, and traces this from Communism through the transition. The paper goes on to demonstrate how demographic data do not always reveal the systemic prejudices against the Gypsy population, and this is indicated through the example of special education. In conclusion, the paper considers some of the implications of the 'ethnicization' of poverty for formulating policy to combat problems of poverty and social exclusion in the context of present-day Hungary.

Demography

A comparative study concerned with the health of Gypsy and non-Gypsy poor families has highlighted demographic differences between these two groups

(Neményi, 2000). Socio-demographic data were collected on approximately 2000 children under six years of age (about 30% of whom are considered Gypsies by the district nurses working with the families). It was found that 67% of the families categorized by district nurses as Gypsy are nuclear families, 22% live in multigenerational extended families, and approximately 8% of the Gypsy families are mother-headed single-parent families. By comparison, 78% of the Hungarian families live in nuclear families, and only 7% constitute multigenerational families. Figures for the proportion of lone-parent families are similar for both groups. The differences in the fertility rates of the two groups also exhibit interesting comparisons. At the time of the survey, the Hungarian mothers had, on average, 2.3 pregnancies, while the figure for Gypsy mothers was 3.6. Of these, 2.7 resulted in birth for Gypsies (1.8 for Hungarian mothers), and 0.9 in miscarriages or abortions (0.3 among Hungarian families). The fertility rates do not refer to total completed fertility, and at the time of the survey the mothers' average ages were 28 for Gypsies and 30 for Hungarian mothers.

In the eyes of society, the family-centredness of the Roma, their attachment to their children, their high fertility, and the fact that they give birth more easily (despite the fact that they have more miscarriages), and breastfeed for a longer period are considered to be positive characteristics. Their high fertility, however, has negative consequences as well. Demographers present to the public visions of the rapid multiplication of Gypsies in a context where the number of Hungarians in the population is declining.

Characteristics of the Gypsy population

The debate over 'who is Gypsy?' divides the scientific community of Hungary. Sociologists, especially those who deal with access by Gypsies to institutions or with their opportunities in areas such as education, health, employment or housing, all agree that it is not the Gypsies' self-definition of identity, but rather the classification as Gypsy by the majority of the population that impairs equality of opportunity due to prejudices and discrimination. Therefore, they argue that a Gypsy is somebody who is assigned this identity by the majority of the population.

Gypsies in Hungary do not form a homogeneous group, however, since three groups of Gypsies have been identified. Most people belong to the group of the Hungarian Gypsies, which makes up 70% of the total Roma population. Hungarian Gypsies are usually characterized by their relatively high level of integration into Hungarian society, as demonstrated by the fact that they no longer speak the Roma language, but with the acknowledgement of their separate folk culture, particularly their distinctive music that is popular at family celebrations. The second group is that of the Vlah Gypsies, making up 20% of the total Roma population. They maintain the so-called 'authentic' Gypsy culture; some of them speak the Gypsy language and preserve their customs. The Beasch people, who make up approximately 10% of Gypsies, form the third and smallest group. They speak an archaic Romanian dialect, and also preserve their traditions.

Perhaps more important than the differences between these three Roma types are the differences that exist between different regions of the country

(see Table 7.1). The geographical spread of the Roma population of Hungary is diffuse, but life in a countryside Gypsy settlement is not comparable to life in the city. Roma typically live in provincial communities, and frequently in the most backward small settlements in the country. This situation has been changing since the early 1990s, with increasing numbers living in countryside towns and fewer in villages, as the figures in Table 7.1 indicate.

Gypsies under Communism

After the Second World War, demand for the traditional professions of Gypsies disappeared almost completely, and trading became practically impossible as the new ideology considered it a form of profiteering. Collectivization of land meant that agricultural day labour also became no longer possible for most Gypsies. In spite of the fact that, before the war, 25% of agricultural day labourers were Gypsies, and as such they should have had a right to land, they were left out of the 1945 land reform. In the new era of Communism, Gypsies were officially considered citizens with rights equal to those of everybody else.

Paradoxically, the Hungarian Socialist Labour Party (the Party) agreed a resolution in 1961 on the 'Gypsy problem', stating that the situation of Gypsies was worse than at the end of the nineteenth century. According to this resolution, Gypsies could be considered as a national minority (just as in other Eastern European countries), because they did not meet the criteria of being a nationality: they lacked a mother-land, a common language and history. The Party claimed that their language was not homogeneous or stable, but rather a pseudo-language made up of elements of various origins, explaining the Gypsies' 'lack of culture'. The 1961 resolution divided Gypsies into three groups, disregarding the opinion of the Gypsies themselves. The basis of the categories was exclusively the level of their integration into society. Accordingly, they were deemed integrated, under integration, and non-integrated. These distinctions were to be understood as economic categories (for example workers without land), and therefore a side-effect of the class system under capitalism, which would disappear with the change of the social system. Furthermore, the Party expected that, if the four achievements of social policy – health care, work, housing, and education and culture – were to be offered to Gypsies, who had lived in oppression for centuries, they would rise to the cultural level of Hungarians. Not a word was said about how to deal with the prejudices of Hungarians against Gypsies.

Under Communism, the majority of Gypsy men became commuting, unskilled workers with a stable, but minimum, income. 'Regular job, more

Table 7.1 Regional distribution of Gypsy population, 1971–94 (in %)

Types of settlement	1971	1994
Budapest, the capital	7.9	9.2
Countryside towns	13.9	30.2
Villages	78.4	60.6
Total	100.0	100.0

Source: Kemény *et al.*, 1993, p. 6.

civilized life, changed life-style, integration is progressing well' was the slogan used by the Socialist system. Under Communism, Gypsies were treated as protected but unworthy citizens. They were not included in the compromise that defined the regime of János Kádár, the leader of the Hungarian Communist Party for 30 years after the suppression of the 1956 revolution. In return for Hungarians accepting his dictatorship, Kádár broke with the Stalinist practice of ideologically based harassment in all areas of people's lives and gave them the possibility of slow but safe growth in prosperity. Roma, in contrast, had to get by on poorly paid, unskilled work far from their homes, which made their integration into the market economy even more difficult.

Some social welfare programs specifically targeted at the Gypsy population did reach them. Most of the isolated Gypsy neighbourhoods were run-down. In 1971, 65% of the Gypsy population lived without any of the basic amenities of civilization. By 1993, this figure had fallen to 14%. Under the rhetoric of elevating the Gypsies to Hungarian standards, Gypsies could receive special housing subsidies and loans. As many of them were assigned inferior apartments in government built housing that formed the core of miserable new ghettos, these Gypsy 'privileges' sparked jealousy with the Hungarian majority. Meanwhile, average Hungarians were growing ever wealthier by working simultaneously in the Socialist first economy and the private sector second economy (at the cost of long working hours and high mortality rates). They were disturbed to learn that their villages were becoming increasingly accessible to Gypsies and that public housing was being assigned to them under the rhetoric of equal opportunities and a caring state.

In the 1980s, when the Communist order was heading for collapse, anti-Gypsy sentiment intensified. Unemployment began to threaten people who had been used to full employment, prices rose and people had to wait many years to obtain an apartment. Rising unemployment hurt the Roma worst of all, but the majority tried to cement crumbling national unity by reinforcing their opposition to the Gypsies.

The Gypsy population in the 1990s

Throughout the ten years of transition, conditions for Gypsies deteriorated dramatically. In the year 2000, Gypsy life expectancy was ten years shorter than that of the typical Hungarian. All sociological studies written after the transition start with the claim that Gypsies were the primary losers of the transition. According to research findings, the majority of Gypsies are living under conditions of permanent and hopeless poverty, dependent on assistance, family allowances, public work (performing community work instead of receiving unemployment benefit), unable to pay their mortgage or utility bills, collecting plants, garbage, and often turning to alcoholism, psychoses, suffering from unsocial behaviour, while their families are falling apart. Their fate, 'Gypsiness is the state of deprivation and stigmatization' (Kerényi, 1998, p. 13). Of all Gypsy households, 53% live in permanent poverty as opposed to 7.5% of all Hungarian households; and Roma make up 33% of all permanently poor households. Table 7.2 illustrates the degree of poverty. The ways in which a society deals with poverty is a test of social solidarity. The state is considered responsible for solving the problem of poverty among those who belong to the

majority, and with whom the majority can identify, because it is seen as originating from external causes that are independent for rental.

At the beginning of the 1990s, the quality of life for the majority of Hungarians had fallen dramatically; unemployment became a mass phenomenon, and large regional gaps developed. In some northern and north-eastern towns and villages, the entire Roma population of working age were unemployed throughout the decade and had practically no chance of returning to the labour market. The need for affordable housing was acute. Squatting and eviction are daily events, but given the poverty of the Roma population, it is they who are the primary perpetrators and victims of the housing problem.

Inequality between the Gypsy and Hungarian population is also evident in education. Gypsies are much more poorly educated than the population as a whole. The quality of schools attended by Gypsy children is low; they often study in segregated classes or in special schools, originally designed for children with mild mental deficiencies. Gypsy children are by far over-represented in special schools compared to non-Gypsy children, even though their level of mental deficiency is no higher (Table 7.3). The opinion that is widespread within the educational system about Gypsy children reflects the attitude of the population at large. The reasons for their failure in school is not

Table 7.2 Comparison of income structure of average households and average Gypsy households, 1993 (in %)

	Income of average households	Income of average Gypsy households
Salaries	54.29	31.90
Entrepreneurial income	4.29	1.41
Income from other than main occupation	9.15	3.19
Transfer income	31.96	63.58
Old-age pension	20.38	16.06
Benefits	0.81	14.75
Family allowances	6.43	24.29
Child care fees	0.86	1.54
Child care allowance, childcare support	0.66	2.61
Unemployment benefit	2.80	4.32
Total	100.00	100.00

Source: Dupcsik, 1997, p. 689.

Table 7.3 Gypsy students in special schools, 1974–93, in percentages

School year	Gypsy
1974/75	26.1
1977/78	30.8
1981/82	36.6
1985/86	39.7
1992/93	42.6

Source: Fiáth, 2000, p.33.

sought in regional disadvantage or low quality schools, but rather in what is considered to be their failed socialization prior to school.

Public and often expert opinion sees Gypsy culture as something rigid, incompatible with progress, which hinders success in school. This sort of thinking exempts educators from having to make changes and blames Gypsies for the problem. Minority education (the aim of which would be to maintain and encourage minority culture and language) often means only the segregation of Gypsy children and offering educational services of lower quality. By the late 1990s, around 91.4% of non-Gypsy students were in secondary education, while among Gypsies the proportion was 33.6%. Of the Gypsy population, 13% held a certificate from a vocational secondary training course and 1% a school-leaving certificate. However, holding a certificate in a vocational skill does not necessarily improve the chances of finding employment, because the vocational structure has barely adjusted to the changes taking place in the labour market, so the risk of unemployment is high. Among those aged over 35, the proportion with a tertiary level qualification exceeds 0.5%; the proportion hovers around 0.3% among the under-35s.

The Gypsies' high rate of unemployment compared to the rest of the society is undoubtedly caused by their low qualifications, which results in more serious consequences in a non-Socialist context, as tables 7.4 and 7.5 demonstrate. Table 7.4 illustrates how there was almost full employment during the Socialist period for the Hungarian population as a whole. After transition, however, as Table 7.5 shows, the situation worsened for the Gypsy population. Discrimination is also evident from a comparison of the levels of employment of Gypsies and non-Gypsies. Long-term unemployment, which often lasts for as much as ten years, is typical among Gypsies. This is a situation for which it is practically impossible to find a solution to break out of the vicious circle of lack of schooling, unemployment and poverty.

Table 7.4 Employment among Gypsies and non-Gypsies during the 1970s (in %)

	Total population including Gypsies	Gypsies
Active	87.7	85.2
Inactive, incapable of working, student or other dependant	12.3	14.8
Total	100.0	100.0

Table 7.5 Active and non-active Gypsies and non-Gypsies, 1993 (in %)

	Non-Gypsies	Gypsies
Employed	54.8	28.7
Unemployed	9.0	28.8
Inactive	36.2	42.5
Total	100.0	100.0

Source: Ministry of Foreign Affairs, 2000, p.23.

After the transition, Gypsies received the opportunity to establish cultural and political organisations. The Minority Law of 1993 made possible the establishment of minority self-governments. This thoroughly debated law and institution cannot fulfil its mission, however, because the minority self-governments are, in fact, pseudo-institutions. Since they lack real power or authority, all they can do is relieve society's bad conscience. Minorities have no parliamentary representation, the Gypsies are not properly represented in national politics.

A social or ethnic issue?

The implications for policy makers of the deprivation characteristic of Gypsies depend on whether the issue is considered as a social or an ethnic problem. From the discussion above, it can be seen that, in the discourse, poverty is 'ethnicized'. Finding a universal solution based on social and political consensus is not considered an appropriate course of action. Above all, this 'ethnicization' allows the political elite to ignore social issues since they are 'ethnic' and not majority issues.

From the point of view of Gypsies, the social aspect of their struggle for recognition is not merely about changing the redistribution process to make it more equitable, but about achieving social rights that are equal to those of the majority and can be asserted without discrimination. Therefore, the majority's preference for a socio-political approach is degrading and segregating, while the Gypsies' demand for social equality is an integrative attempt to restore self-esteem and self-respect.

As far as discussions by the majority are concerned about the Gypsies and the Roma as minorities, differentiation on the part of the majority against the will of the minority is forbidden by the constitution. This is guaranteed by data protection laws that prohibit registering Gypsy origin in administrative records. However 'to be called Gypsy' in a pejorative or discriminatory sense is not considered to be an offence, even if the basic rights to human dignity and self-respect are infringed. A social discourse is, nonetheless, developing to express protest against the public representation of degradation, humiliation, and prejudice against minorities. One of the easily recognizable signs of this is the uncertainty around naming this minority group.

It can be concluded that the otherness of Gypsies in Hungary means that they are deprived of opportunities for improvement, and of economic, political, and cultural capital. Their culture alone is acknowledged, but only as a tolerated, often exotic, spectacle, by which they gain entry to the altars of Hungarian culture with bare heads only. To understand the socio-demographic changes and challenges throughout recent decades in Hungary, it is therefore necessary to examine developments at a sub-national level in both political and popular debates. It is only then that the complex policy needs of this richly diverse society can be appreciated in their entirety.

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8. Socio-Demographic Change in Poland

Wielisława Warzywoda-Kruszyńska and Jerzy Krzyszowski

Poland's population size ranks eighth in Europe. Its urban population is relatively small and accounts for only 61.8% of the total, whereas in the EU, urban populations range from 89.3% in the United Kingdom to 66.8% in Italy. Five Polish cities have over 500 000 inhabitants and only the capital city, Warsaw, has more than 1 million inhabitants (1 615 400). In the 1998 United Nations' human development report for Poland, the country reached the fifty-second rank (HDI = 0.883), and the Human Development Index for particular provinces (*voivodeships*) ranged from 0.760 to 0.909 (UNDP, 1998). In comparison with other European countries, Poland is very homogenous with regards to ethnicity and religion. The majority of citizens are Poles and Roman Catholics. It is essentially the division between urban and rural areas that produces differences in economic development and variations in socio-demographic trends.

This paper focuses on two key socio-demographic changes that were of concern to the Polish government at the turn of the twenty-first century: declining fertility rates and population ageing. The paper illustrates how these indicators vary across time and space, highlighting how the urban versus the rural dimension is particularly important for understanding the subnational demographic and employment situation in Poland. The paper shows that pressures imposed on the state budget by declining fertility rates and population ageing are not affecting the whole of the country in the same way. Change has strong regional characteristics, which need to be taken into account in the policy responses of governments.

Demographic change and the urban/rural divide

During the 1990s, the size of the population began to decline: by the end of the twentieth century, the population of Poland stood at 38 654 000, and for the first time in Poland's modern history it was less (about 13 000) than in the preceding year. The decrease in the size of the population has been observed in all of Poland's largest cities, while at the same time a slight increase has occurred in the number of inhabitants in neighbouring small towns and villages. According to the Central Statistical Office (GUS, 2000a, p. 52), with slightly under 3000 migrations to urban areas, 1999 saw the lowest figure for migrations from urban to rural areas in the entire post-war period, due to the reduction in the influx of population to cities for both permanent and temporary stay. The reversal in the movement of population from rural to urban areas can be explained by deindustrialization and restructuring policies. Plants had laid off workers, and few jobs were available in the cities. Many of the workers born in villages returned home when factories were closed. In addition, 'Dewelferization' of cities, or the withdrawal of financial support for inhabitants by the state and local government, raised the cost of housing and transport. Industrial workers who had previously lived in workers' hostels or rented apartments could no longer afford to live there and were forced to return to their villages.

Not only is population declining, it is also ageing, which is creating serious problems for Polish society and the state. The extension of life expectancy has been one of Poland's most significant achievements. According to data from the Central Statistical Office, life expectancy in the 1930s was 48.2 years for men and 51.4 for women. In 1960, it rose to 64.9 and 70.6 years respectively, with slightly lower figures being recorded for rural areas. In 1999, it was 68.8 years for men and 77.5 for women, with men living longer in urban compared with rural areas, but women living longer in the rural environment. Three observations can be drawn from these data. Firstly, the life expectancy of women grew more markedly than that of men in the postwar period: it has increased by 15.8 years since 1950, compared with 12.8 years for men. Secondly, place of residence had an important impact on the life expectancy of men in the late 1990s, but was less significant for women, and has been so since the 1970s. Thirdly, the difference in life expectancy between men and women became much greater in 1999 than it was during the postwar period, reaching 8.2 years in urban areas, compared with 6.2 in 1950, and 9.4 years in rural areas, compared with 5.2 in 1950.

The basic factors determining mortality include individual behaviour, such as unhealthy lifestyle, unhealthy diet, smoking and alcohol addiction; and social processes affecting health protection, covering the development of medical sciences, health and social care and the standard of living. Researchers are not unanimous in their opinion about which factors play the most decisive role in life expectancy. Nonetheless, it seems likely that the differences in the life expectancy of men and women are caused by individual behaviour, particularly in rural areas.

Since 1960, a consistent decrease in the number of births has also been observed in Poland, with the exception of the early 1980s. By the 1990s, the fertility rate no longer guaranteed population replacement. This trend, known as 'the second demographic transformation', is taking place throughout Poland, but to varying degrees (Holzer, 1999; Kotowska, 1999). The average number of children born in 1999 to a woman of reproductive age (15–49) was 1.36, but in urban areas the average number is 1.20, while in rural areas the figure is 1.64. In 1999, 384 400 live births were registered, that is 14 000 less than in the previous year. In 1990 the crude birth rate stood at 14.4, while in 1999 it was 9.9. Though rates in rural areas remain higher than in urban areas (11.7 compared with 8.8), the reduction is more marked for the rural than the urban population (5.5 points compared with 4.8 for 1990–99).

As in western European countries, among other factors preventing women bearing children is the postponement of the age of child birth due to the extension of the period spent in education by young people, especially women. Pursuing a professional career delays child birth, and in some cases women choose not to have children at all, leading to a further decline in the general level of fertility (Boleslawski, 1999, p. 135). The social acceptance of childlessness is constantly growing in some social groups, such as the well-educated, young people in large cities and dual-income families (Kaniewicz and Nowakowska, 1999).

Longer schooling and enhanced career aspirations are also resulting in the postponement of marriage to a later age, and the number of unmarried people is constantly growing (GUS, 2000a). The average age at which women

contract their first marriage rose from 22 years in 1970 to 23.5 years in 1999, and the percentage of women getting married fell from 95% to 80%.

The combination of falling fertility rates and greater life expectancy has accelerated the process of population ageing, leading to a shift in the balance between age groups. The proportion of the population aged 60 or over increased from 8.3% in 1950 to 13.0% in 1970, and 15.0% in 1990. The increase was sustained during the 1990s, reaching 16.5% in 1999. At the same time, the proportion of children and young people aged 0–14 fell continuously between 1950–99, from 29.4%, to 19.6%.

Until 1990, the process of rural population ageing was more marked, but during the 1990s it accelerated at a faster rate in the cities than in rural areas (Kotowska and Kuszewski, 1999). The proportion of the population aged 60 or over doubled from 8.5% in 1990 to 17.6% in 1997, compared with 8.0% in 1950 and 15.4% in 1997 for the rural population. The situation for men and women can again be distinguished. The proportion of people aged 60 and over is significantly larger among women than men. In 1997, it was 17.8% for women living in urban areas, compared with 12.7% for men; and 20.8% for women living in rural areas, compared with 14.3% for men. Differences are also found according to marital status. Among older women, 41.2% are married and 50.5% widowed; among older men, 80.9% are married and 13.2% widowed (Fratczak and Sobieszak, 1999, p. 20).

Declining fertility rates and population ageing have changed the structure of the dependent population of Poland. In 1950, for every 100 people of working age, 61 were below and 12 were above working age. In 1999, the figures were 41 and 24 respectively. Though population ageing is present across Poland, the rate and pace of change vary between rural and urban areas. The size of the dependent population was and still is greater in rural areas, as shown in Table 8.1.

The process of population ageing is placing a heavier burden on state expenditure, particularly on old-age pensions and social benefits. The number of people receiving a state pension increased from 7.1 million in 1990 to 9.3 million in 1997 (GUS, 1998). State spending on social protection also increased almost threefold over the same period. The proportion of the national budget devoted to pensions increased from 25.4% in 1990 to 34.4% in 1995 (Central Statistical Office, 1997). The growing population of older people is thus exerting pressure on the state budget and posing a threat to its future balance.

Urban/rural unemployment and poverty

Another factor contributing to the differential impact of population decline and ageing for urban and rural areas, and also for gender, is the development of

Table 8.1 The dependent population in Poland by urban/rural status, 1950–99 (in %)

Urban		Rural		Urban		Rural	
Below working age		Above working age		Below working age		Above working age	
1950	1999	1950	1999	1950	1999	1950	1999
52	37	11	22	67	49	12	27

unemployment in the early 1990s and the poverty associated with it, which has led to higher mortality rates (Holzer, 1994; Tabeu, 1996). Though women are more affected by unemployment than men, it is men who are more likely to suffer psychologically and physically, and die at an earlier age because of the dramatic effect of losing their traditional role as the breadwinner. The transformation to a market economy is seen as the cause of high levels of unemployment, which is a new experience for those generations born after the Second World War.

By the first quarter of 2000, the overall unemployment rate had reached 16.7%. Those most affected by unemployment were people below 24 years of age, among whom the rate reached 37.7% (GUS, 2000b). Marked differences are found between the provinces both in absolute numbers and in the unemployment rate. In the underdeveloped areas of Poland, where state-owned farms existed before 1989, for example Warminsko-Mazurskie Voivodeship, the unemployment rate was highest, with 23.2%.

The economies in such regions collapsed at the beginning of the 1990s when state subsidies were stopped. Some small towns and big cities also suffer from high unemployment rates. The unemployment rate in ten of the largest cities in Poland ranges from 1.5% to 13.1%, with the second largest Polish city, Lodz, exhibiting an unemployment rate above the Polish average. In the 1990s more than 5 million people in Poland moved from employment to unemployment (Kabaj, 2000), thereby increasing the proportion of the population dependent on social assistance. This group includes the economically inactive, for example, those who have taken early retirement or are disabled.

The changes during the transition of the 1990s have also affected the distribution of incomes, leading to an increase in poverty, economic and social inequality and pushing some categories of the population to the margins of society. The Gini-coefficient was 0.27 in 1989 and 0.33 in 1997. In 1998, 15.8% of the population were living below the relative poverty line (when measured as 50% of the average equivalent spending of households). At the same time 5.6% were living below the subsistence minimum (GUS, 1999).

Significant differences can be found in this respect between rural and urban areas as well as between social categories. While in urban areas the poverty rate, calculated according to the relative poverty line, was as high as 10.3% and the subsistence minimum was 3.3% in 1998, it reached 23.2% and 8.7% respectively in rural areas. In small towns with no more than 20 000 inhabitants, the poverty rate was 15.9%, while the percentage of people living below the subsistence minimum was 4.9%, in comparison with 4.3% and 1.2% in the largest cities.

Among the poorest families, those with a head of household below the age of 34 were over-represented: 18.2% were living below the poverty line and 6.6% below the subsistence minimum in 1998. The proportion of the population living on welfare benefits, including unemployment benefit and social assistance, were also over-represented: 47.4% of such households live below the poverty line and 25.8% below the subsistence minimum. Poverty is also often experienced by farmers, farm workers and households living on a disability pension: 21.2%, 18.4% and 22% respectively in these categories are

living below the poverty line, and 6.9%, 5.9% and 8.7% below the subsistence minimum (GUS, 1998).

Poverty is not only associated with unemployment. It is often related to family size. In Poland, large families are frequently recorded in villages heavily affected by unemployment and poverty, particularly those where state-owned farms have collapsed (Zablocki *et al.*, 1999; Tarkowska, 2000). Also the fertility rate is particularly high in enclaves of poverty located in big cities (Warzywoda-Kruszyńska 1999, 2000). This phenomenon seems to be due to the fact that poor people are less well educated and thus do not know how to control their reproduction. It means that, for numerous poor households, family allowance and welfare benefit for dependent children are the only sources of income. The fear of slipping into unemployment and poverty would seem to be the factor preventing people from having more children and thus subjecting their families to an even worse situation.

Policy responses to population decline and ageing

In response to the low and declining fertility rates, measures have been adopted to encourage population growth. For example, a more restrictive law has been introduced to regulate abortion, although populationist arguments are not being articulated openly. The law on Family planning, protection of the human foetus and the conditions under which abortion is allowed came into force in 1993. It put an end to the right (granted in 1956) to perform an abortion at the request of a woman in a difficult financial and social situation. The law allows for abortion under medical advice if the pregnancy represents a threat to the mother's life, or if prenatal tests show serious and irreversible damage to the foetus, and when pregnancy is a result of a punishable act of rape. In this case, abortion is permitted up to the end of twelfth week of pregnancy.

Restrictions on the conditions under which an abortion is carried out do not appear to have exerted the expected influence on women's fertility (Fratczak, 1999, p. 148). The real number of abortions in Poland is impossible to estimate, but the number of legal abortions has decreased dramatically. In 1989, the number of legal abortions was estimated at nearly 100 000 per year. It fell to under 1000 in 1994/95 and then rose again to reach 3047 in 1997. The rate of legal abortions in relation to births was as high as 224.67 per 1000 births in 1960 (the earliest data available on abortions), while in 1997 it was 7.6 per 1000.

The change in the law would seem to be associated with a rise in the number of children born out of wedlock, especially among teenagers, but the linkage requires empirical verification (Golinowska, *et al.*, 1999, pp. 13–15). An increase in the relative number of illegitimate births has been observed since 1970, and is more prevalent in urban compared with rural areas. In 1990, for example, 7.8% of all children born in urban Poland were born out of wedlock, rising to 14.4% in 1999. In rural areas, illegitimate births accounted for 4.4% of all rural births in 1990 and 8.4% in 1999. Cultural factors and social cohesion would seem to explain the differences. Nonetheless, in some rural provinces the proportion of illegitimate births is even greater than in the larger cities: in villages it reaches 27.6% in former Koszalinie, 24.2% in former Szczecinskie and 20.6% in former Gorzowskie, compared with 18.6% in Lodz, 15.6% in Warsaw and 14.2% in Poznan, (GUS 2000c).

In addition to a restrictive abortion law some other measures were introduced in the 1990s to stimulate growth in family size. Maternity leave was extended to six months, while maternity benefit was paid at a rate equal to 100% of the mother's average salary. Simultaneously, contraceptives were no longer subsidized by the state. Parents were granted the right to decide whether the mother or father stays at home to care for a child under the age of four, if they want to take parental leave. These stimuli do not seem to be effective. Instead, it is the situation of the labour market that plays a more important role in preventing people having more children.

In response to the growing pressures on the state budget resulting from population ageing, rising unemployment and poverty, a new system of social protection was introduced in January 1999. It is aimed at a gradual retrenchment of social expenditure paid for from the state budget. One part of the new pension system involves paying higher taxes to the state pension fund. Alongside greater contributions through taxes, part of the compulsory payment is transferred to a private pension fund, thereby combining pay-as-you-go and funded systems. The two systems are complementary and will allow the state budget to avoid the negative consequences of population ageing, such as the growing number of old-age pensioners and the simultaneous decline in the number of people working.

The drawback to this system is that the recent change in the old-age pension scheme applies to employees. It does not encompass people working on a family farm, although they can contribute to private pension funds, if they are able to afford to do so. However, since, as this paper has indicated, the process of ageing is more advanced in rural areas, and older people in villages are often living below the poverty line, the new pension scheme is of little benefit to older people in rural areas. They have not paid sufficient taxes and are unable to meet the additional costs of the private pension funds. In addition to the disadvantageous pension scheme, social services aimed at the elderly are also underdeveloped in rural areas, where very few non-governmental organizations are available to care for older people in the villages, and human and financial resources in the publicly provided social protection system are insufficient. The only hope for older people in rural areas, in particular, is that their grandchildren will remain in the village and take care of them. Unless the political elite develops a greater understanding of the social problems in rural areas, the gap between urban and rural areas will only widen.

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9. Ireland before and after Accession to the European Union

Maurice FitzGerald

The last quarter of the twentieth century saw a complete transformation in Ireland's economic and social fortunes. While not ignoring the fact that serious problems have had to be confronted in the intervening period since it acceded to the European Economic Community in 1973, a major metamorphosis – both in mind and deed – has taken place. Until the early/mid-1990s, the possibility of a Celtic tiger existing would have been dismissed as a grand delusion. Instead, as it enters the twenty-first century, Ireland could hardly contrast more with the autarkic portrayal drawn at the height of the Second World War of a 'people ... satisfied with frugal comfort' (Moynihan, 1980, p. 466).

The Irish were not content with this lack of ambition; a more positive vision, coupled with realizable goals, was necessary. But negotiating a clear and steady path towards realizing the dream of more fulsome comfort has not always been easy. In fact, the process of change in Ireland's economy and society was uneven, and a considerable number of important matters remain largely unresolved.

If any event in contemporary Irish history were to be considered a watershed, it would have to be entry into the EEC. During the second half of the twentieth century, not only did Irish society mature, but the country also went from being economically dependent on the United Kingdom to being interdependent within the European Union. The change in traditional outlook and relations was financial as well as psychological; it has come to be exemplified by a buoyant economy and a people who are confident in the role they now play at home and abroad. Changing migration patterns illustrate that traditional sets of relations do not hold true anymore. Irish people no longer have to leave their native shores to make a living. Indeed, growing labour shortages in Ireland mean that companies increasingly source many of their employees from places that were the destinations of previous generations. The hemorrhaging effects of emigration have been reversed. A further obvious and unambiguous example of this phenomenon of shifting relationships is the fact that, 20 years after it left the sterling area, Ireland was one of the EU member states successfully operating in the euro-zone.

Radical change has not only occurred in the economic domain, it is visible in societal patterns as well, no more so than in the realm of religious practice. Ireland is not necessarily the 'home of a people living the life that God desires that man should live', as Eamon de Valera, a former Irish prime minister defines it (Moynihan, 1980, p. 466). Not only has attendance at services fallen dramatically within the space of half a generation, the influence of the Catholic Church has collapsed (Foyle, 2000). Evolving attitudes and realities mean that issues customarily the preserve of incontestable dogma, including abortion, divorce, homosexuality, are no longer seen as sacrosanct.

Having entered the public arena, they are no longer taboo. These issues have been, or are being, faced and resolved. Other matters may remain improperly confronted, especially the racism consistently shown to indigenous travellers and, more recently, towards immigrants from Africa and Eastern

Europe. However, if the transformed place of women in society is any indication, these problems might also conceivably be resolved in time, partially through legislation emanating from the EU, partly through changing perceptions in a nation that remains young both in mind and demographically.

This paper examines the implications for social life of the phenomenal economic growth that Ireland has achieved since joining the EU, especially during the 1990s. It discusses the socio-demographic changes that have taken place and analyses their effect on population growth and ageing, family formation, and gender relations. The paper argues that the benefits of economic growth have not been evenly distributed between rural and urban areas, social categories or women and men, with the result that economic change has created important challenges for policy formulation and implementation. This is an era during which the political elite responsible for the birth and ongoing development of the Celtic tiger is under sustained attack on substantial charges of corruption and misconduct in office. It will be intriguing to see how these issues that directly affect the public are managed and whether these challenges become more central to future public policy.

The advance of the Irish economy

At the turn of this century, Ireland is booming. Not only is it the EU's fastest growing economy, but this growth is set to continue. Exchequer income has been surpassing all expectations in recent years. Indeed, the recent annual budget surplus was being estimated at EUR3.2 billion. However, the Dublin government is facing at least one major economic problem that is not being treated seriously: inflation is close to 7%, nearly three times the EU average. It is difficult to persuade voters – especially when a snap election might be called at any point – that restraint should be practiced when it comes to national pay bargaining and wage increases, since the message they are repeatedly hearing is how well the economy is performing. This is especially the case at a time when prices are soaring in the shops ('Ireland's risky budget', 2000, p. 50).

In historical terms, these affluent times are relatively uncharted territory. The economy has never before been in such a buoyant state. For much of the 1950s, the mid-1970s and throughout most of the 1980s, this was not the case. Irish finance ministers were not always in a position to tackle the poverty that afflicted the country with the kind of long-term planning demanded by the intractable economic problems it faced. One constant since the early 1960s has been the government's attitude to European integration. The mind-set of austerity was difficult to shake off, especially as Ireland did not recover quickly from the isolationism enshrined in its wartime neutrality policy. Once a new political cadre took over in the second half of the 1950s, attitudes began to change. Innovative and vibrant economic thinking – through the attraction of foreign direct investment (FDI) for instance – meant that Irish politicians began to look beyond the United Kingdom marketplace for solutions to the country's economic ills. Part of this process was focused on the developments in freer trade that were taking place in Europe. It was decided that a protective economic policy would not suffice, never mind flourish, in an increasingly global economy, so the decision to liberalize was taken (FitzGerald, 2000). At the centre of this planning was membership of the EEC. Accession may only have been achieved at the third attempt, but the decade it took to secure entry also

gave the Irish government time to prepare the population and, more importantly, to ready the agricultural and industrial sectors. Even though European integration was perceived as both a threat and an opportunity, it was clear that initiative was needed to head off inaction.

Since 1973, Ireland has had to face economic recession, resulting from the oil crises of the mid-1970s, followed by the traumas of the early 1980s when the young, old and jobless became increasingly dependent on a small and contracting workforce. Unemployment soared and emigration increased. Dependency – especially in trading terms with the United Kingdom, and perhaps even a blame culture, in the sense that reference is so readily made to the past rather than to the present or the future – has habitually slowed down progress rather than acting as a spur. Nevertheless, efforts dating from 1987 to stabilize wage increases, and thus get agreement to low-level pay rises, have coincided with, and contributed to, the fact that the economy has grown by an average of 5.5% per annum ever since, reaching 9% in 2000.

Economic stability laid the foundations for the successful Celtic tiger that exists today, even if a dependency on FDI is unsound in the long run because of the dangers posed by wider global developments that will always be beyond the control of an individual government. It remains to be seen how the economy copes with the growing saturation of the computer market when companies such as Apple, Dell and Intel, who, with the considerable help of generous government tax concessions, have invested in Ireland and reaped the rewards, but remain footloose and liable to downsizing. Job cuts at Motorola in Dublin at the end of 2000 – and infamously at Digital in Galway a decade earlier – demonstrate the negative effects multinational decision making can have on those who actually lose their jobs and on confidence in the economy as a whole ('Motorola troubles', 2000). Dublin can absorb such losses, but rural economies like Galway can become overly dependent on large employers.

At the same time as continuing to extract enormous profits, it will also be interesting to see if the impact of pharmaceutical companies like Pfizer will be as effective, enduring and rewarding in economic terms as its products appear to have been for consumers. However, Ireland's presence in the euro-zone, allied to the sense that it is now 'going through an economic boom because we joined Europe in 1973', means that the country is competitive because of sensible, and far-sighted, decisions taken in the 1960s (Bowcott, 2000, p. 15).

Ireland's Gross Domestic Profit per capita may easily outstrip the United Kingdom, but the proceeds of a thriving economy do not appear to have trickled down to all citizens. For the moment, workers have been rewarded with a minimum wage and by more generous tax-free allowances, though cuts in tax have not only been for the lowest paid; indeed, the top rate of tax has fallen from 48% to 42% in five years. In reality, not all of the benefits of earlier austerity are being shared out equally. The economic consensus that has existed until recently has been severely challenged by inflation. In demanding substantial pay increases, public sector workers have clearly demonstrated their belief that the economy has not benefited their financial position in relative terms. Strikes have become more commonplace once again. The Irish finance minister's efforts to calm these tensions with a generous budget have received mixed reviews. In total, EUR2.6 billion was given away for 2001, a mixture of tax cuts and increases in social welfare. How is this reflected in the incomes,

and relative purchasing power, of those most at risk from inflation, the jobless, the poor and the old?

It is becoming increasingly difficult for people to own their own homes. This applies not only for first time buyers, in a market that has increasingly seen the appearance of over-priced accommodation. There are around 40000 households on waiting lists for public housing, a 400% increase in a decade, in a country that has the second highest rate of child poverty in Europe. The blatantly obvious increase in the level of homelessness is more significant proof of a malaise affecting society, as ever growing numbers of people miss out on the prosperity that the Celtic tiger has been promising. High inflation levels impact on those relatively poorer sections of society wanting to own (or even rent) a home more than those who have done well out of the economy's sudden expansion. The fact that even a conservative estimate of consistent poverty in Irish society of around 10–12% of the population is accepted with barely a comment from the government is further evidence that all is not necessarily well (Kennedy, 2000).

As in the United Kingdom, unemployment in Ireland is well below the EU average and falling, with a relatively even distribution between men and women. This example of equality is due at least in part to the availability of part-time work, the growth in support for mothers to return to the workplace, and to changes in attitudes and society.

The young are also relatively well represented in the workplace, with the unemployment rate for those under 25 half the average euro-zone level (European Commission, 2000, pp. 18–21). Nonetheless, social deprivation, increasing marginalization, chronic and enduring unemployment are still evident in certain economic blackspots: urban areas, such as Tallaght in County Dublin, and across the mid-west and south-west of the country (Brennan, 2000).

Billions of pounds in EU funds have not yet been translated into the eradication of poverty. While general economic prosperity continues, both in terms of growth and employment levels, the vast majority of society is set to see the benefits of increasing modernization. Conversely, any decline in the economy's impressive performance is likely to have very negative implications for society as a whole, but particularly for those in its most vulnerable sections.

The contradictions in Irish society

If the economy is doing so well, what effects has modernization had on population growth, the age ratio, immigration, family life, gender and intergenerational relations? What part does religion play in society? Are there sub-national variations? Ireland is certainly a more diverse and complicated place in which to live, but has the quality of life improved compared with half a century ago?

Ireland has a relatively unusual demographic profile by EU standards. Not only does it have a lower life expectancy for both men and women than the EU average, but it has a higher completed fertility rate as well. Although these figures differ appreciably from the early 1970s, relative rates have not improved. Indeed, average life expectancy for Irish men has fallen below the EU average.

In contrast to much of the rest of the EU, Ireland's population is still growing steadily, a process that looks set to continue as traditional emigration is reversed. Significant changes may have taken place. Publicly uttered attitudes to contraception have been brought more into line with private practice, while the abortion debate has taken many twists and turns. The combination of relatively low life expectancy and relatively high fertility (see Table 9.1) means that Ireland's population is still deemed to be the youngest in the EU.

Meanwhile, the issue of pensions, or the provision of health care for the older people, is not such a pressing problem, nor such a big economic concern, as it is for other EU states such as Italy. Attitudes to post-retirement provision and to the state of the health service fund are clear indications of the work that still has to be done. Although the vast majority of public sector workers have pension coverage, only a minority of self-employed people and half of the country's private sector employees have made such provision. Some of the proceeds of privatization have found their way into providing for the future, but too much of the money earned by the exchequer in recent years has gone in substantial tax cuts for the wealthier sectors of society rather than the poorest.

This may not be a threat to Ireland's wellbeing for the moment, but that situation could well change in the future. Further provision will have to be made for poorer people, a fact that will be made appreciably worse by an ageing population. The social welfare infrastructure – which sees lengthening hospital waiting lists – can barely cope in a period of prosperity, but will be under serious threat if recession returns.

One of the best measures of this dramatic change in society is the level of emigration. High birth rates have traditionally meant that the most able – the brightest and the youngest – have had to leave their homes to find employment, either moving eastwards from the rural west of Ireland to urban life in Dublin, the United Kingdom or even further afield. Those who remained behind were effected by this phenomenon due to the lack of marriage partners, with the result that marriage rates during the 1950s were relatively low, especially in rural areas.

Characteristic economic features such as unemployment and underemployment have been replaced by a dearth of workers and by an increase in job availability. This has increasingly meant that those emigrants who departed more recently – added to the descendants of earlier generations – are being attracted back because of the economy's insatiable appetite for new employees.

Table 9.1 Ireland's demographic profile, contrasted with the EU, 1970 and 1997

Ireland (European Union)	Male life expectancy in years	Female life expectancy in years	Completed fertility rate for children per woman
1970	68.8 (68.4)	73.5 (74.7)	3.50 (2.38)
1997	73.4 (74.5)	78.6 (80.9)	2.30 (1.81)

Source: European Commission, 2000, p. 9.

Low unemployment has not only seen migratory flows reversed from emigration to immigration, but has also led to a novel experience in Ireland, the growth of minority communities. This is one area where Irish society has been very slow to react in a positive fashion. Having traditionally used emigration as a crucial escape valve to relieve the pressure caused by the historic lack of job prospects, many people apparently find it difficult to adapt to the repercussions of the new conditions. Having attained 100% of the EU average income per head of population in December 2000, Ireland has reached a milestone, reflecting its change of status from being one of the relatively poor to one of the richest EU member states. However, the reaction has not been to welcome immigrant labour. On the contrary, certain politicians have been adopting a negative stance towards people with a different culture, language, religion, and/or skin colour coming to live in Ireland, an attitude that mirrors the treatment frequently meted out to indigenous travellers. Having used emigration as the number one route to alleviate economic distress, Irish society is now treating economic migrants in much the same way that previous generations were themselves treated when they went in the opposite direction. Intolerance is being demonstrated through the increasing number of racially motivated verbal and physical attacks. But this only reflects the government's support for the more stringent treatment of non-white extra-communitarians by the EU and its lack of support for emigrants when they do arrive. Despite a severe labour shortage, emigrants waiting for their cases for residency to be heard are very much restricted from taking jobs.

The upturn in employment prospects has contributed to the rapid decrease in dependency within Irish society, as young, jobless and/or older people constitute an ever-smaller proportion of the population. New entrants into the workforce could sustain this development even further. In the mid-1980s, there were 2.2 dependants per worker; by 1996 this ratio had fallen to 1.9:1 and since then it has dropped below the EU average of 1.4:1. It is predicted that the ratio will reach 1.6:1 by 2006 and that it will be as low as 1.33:1 in 2010. The more people that can be integrated into the workforce, the stronger the economy will become, and the more diversified Irish society is expected to be.

Other changes are following on from these developments. Not only are Irish women remaining in the country, they are marrying later and are having fewer children (if any at all), and they are also beginning to compete with men in the workplace. As a percentage of the civilian working population, women still lag far behind the number of men and represent only a slightly larger proportion of the economically active population than in Greece, Italy and Spain. However, the traditional idea that the place for married women is in the home has been challenged and overcome. Equality legislation emanating from Brussels has meant, for example, that the ban on married women in the civil service has long disappeared. Subsequent EU employment legislation has only strengthened their position, although parity remains some way off in practice. Nevertheless, the entitlement to ten weeks statutory maternity leave on full pay, though it might not be on a par with Denmark or Italy, is still well ahead of United Kingdom provisions (Burkitt, 2000). Society's increasing acceptance of lone parenthood, the growth in cohabitation, and a general move away from the traditional family unit are not just the results of modernization, they demonstrate a fundamental reorientation.

One of the main losers in Ireland's transformation to a modern society has been the Catholic Church. Having once dominated perceptions and thinking, the high watermark of its power was a successful challenge in 1951 to the Irish health minister's attempt to socialize the distribution of medical care. However, the minister's subsequent resignation was to act as a virus that would irreparably weaken the church's position over time.

Society was becoming ready for change. The advent of television and popular culture, especially during the 1960s, exposed the country to the world. The wider availability of contraception by the 1970s, the attempts during the 1980s to introduce divorce – and, conversely, an effort by pro-life supporters to reinforce the ban on abortion – further deepened the divide between the Catholic Church and a growing section of society. The gradual fall in church attendance has not been helped by ongoing revelations of gross misconduct, as well as other serious abuses, by certain elements of the clergy in relation to some of the most vulnerable people entrusted to their care.

A secular element has entered into the way the country is governed. The government no longer interferes in people's sexual mores. Having not only made contraception freely available and finally providing for the possibility of divorce, homosexuality has gone from being criminal to no longer being a bar on military service in the space of less than a decade. However, one of the major social issues that has yet to be resolved remains the question of abortion.

Despite four attempts to tackle the abortion question by referendum, successive Irish governments have failed to address the issue directly by legislative means. A constitutional ban on abortion makes this difficult, but not impossible if the political will exists. The last effort to let the people decide led to a confused reply that, effectively, allows abortions to be carried out abroad, but not in Ireland. The intermediate solution has, therefore, been to export the problem to the United Kingdom. In 1999, over 6000 Irish women travelled across the Irish Sea to secure the termination of their pregnancies. The subject of abortion is generally one to be avoided by Irish politicians who want a long-term and, thus, successful career. No votes are to be gained by confronting the issue head-on. Thus, it festers and remains unresolved ('Ireland's sad and confusing secret', 2000, p. 58).

This is not an usual approach to decision making in Ireland, forward planning does not necessarily go far beyond the next general election. For instance, the population will begin to age quite significantly from the year 2005 and will double within the space of a generation, so this is obviously an issue that must receive careful attention. The Irish finance minister's response to the plight of pensioners was to give them an 11.5% increase at the budget announcement in December 2000, but there is little indication that serious provision is being made for future generations ('Irish boom has passed soundness barrier', 2000, p. 27). The ageing process is not evenly spread across the country. The population in rural areas, particularly in the west of Ireland, is growing older at a faster rate than in urban areas. Despite the best efforts of the EU, traditional sectors of employment, such as agriculture or fishing, are not so attractive to younger generations. The population in the more affluent eastern part of the country is also ageing, but grows in number. It now accounts for over half the population, with a quarter of the total population living in the Greater Dublin area. Meanwhile, the percentage share for the west

and north-west of the country fell by a third between the mid-1920s and the mid-1990s. Thus, by 1996, when the last census was taken, 42% of Irish people lived in rural areas, compared with 66% of the population when the state was born in the early 1920s (Central Statistics Office, 1997). This demographic change led to the redrawing of boundaries for the general election in June 1997 to reflect population patterns more accurately. The traditional picture of a content, but impoverished, rural Irish people has been replaced by the images of a vibrant and more consumer-oriented society. Ireland has plunged headlong into the twenty-first century, having spent much of the previous 100 years slowly leaving the nineteenth.

Policy challenges for the twenty-first century

A constant theme throughout the last half-century has been the slowly evolving development of a European consciousness. Despite the efforts of some Irish politicians to argue that the country has more in common with Boston than it does with Brussels, this is most certainly not the case and does not reflect the Europhile nature of the population at large (de Valera, 2000). The EU Commission President has countered sentiments like these by arguing that: 'Outside Europe, you have nothing. What would you be outside Europe?' (Prodi, 2000) Although the modernization process in Irish society, following on from the country's economic transformation, is not just due to Brussels, European integration has given Ireland a framework within which to develop and catch up with the mainstream. European norms have been accepted into Ireland, though they have often been greeted with resistance from the government when the apparent economic costs outweigh the benefits: structural funds were much easier to accept than the extension of social obligations. Despite a populace that continues to believe in very large numbers that EU membership is a 'good thing', unremitting support for all EU policies is not guaranteed, especially when decisions contravene the perceived national interest (Bowcott, 2000, p. 15).

However, it is readily apparent that Irish membership of the EU is more important than relationships based on a history of colonization or emigration. The second half of the twentieth century, particularly the last 25 years, have seen changes unimaginable at the height of war. Ireland's economy and society were transformed. The rural to urban shift continued apace, the position of women changed beyond recognition, and the nation remained young. Such changes present real challenges for the country as a whole. How are governments, which a generation ago took serious heed of the advice emanating from the church, meant to operate in increasingly material and ethnically diverse times? How are institutions and practices dating from another era meant to cope in a consumerist world? The steps taken to address the implications of modernity, both for the economy and society, will be as exacting and illuminating for other nations facing this transition, especially those in Eastern Europe, as it was for the Irish people, though the EU clearly provides an appropriate context.

As it enters this new century in a healthier position than it has been in its entire modern history, Ireland has certain advantages but it still faces some major difficulties. With its population set to reach 4 million inhabitants by the year 2025, its economy booming and its society maturing, the broad outlook is

one of ongoing development. However, an economic downturn would rapidly dissipate the store of confidence that has been built up; it would quickly test the structures that have been put in place and would also eat into the meager reserves that the government has put aside. It is clear that advances have been made in Irish society, but they are not commensurate with what has taken place in the economy.

On the whole, though Ireland is much more confident about its role in the EU and its place in the wider world, it needs to become more tolerant; it has to eradicate poverty and establish greater social equality. The situation at the dawn of the new millennium represented a once in a lifetime opportunity; the government had the power to shape public opinion rather than to be led by the most vocal or backward-looking elements. The challenge for the Irish government was how to avoid throwing this chance away.

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