Who Cares for Equality?

A comparative analysis of gender equality and intergenerational care policy in European welfare states

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Abstract

This thesis provides a comparative analysis of intergenerational care policies in European welfare states and the ways in which they bare on gender equality. The aim is to identify a range of policies positively and negatively affecting the gendered division of wage and non-wage care labour. The insights gained can benefit researchers and policy-makers committed to transforming gendered roles and moving towards a more egalitarian society.

Two main contributions are made in this thesis. First, equal attention is given to eldercare responsibilities alongside childcare responsibilities, as it argued to be an equally important but often overlooked dimension when analysing the gendered division of wage and non-wage care labour. Secondly, non-wage care is conceptualised as a form of labour as doing so is necessary in order to eliminate the separation of the ‘private’ and ‘public’ sphere, which stands in the way of bringing gender equality about.

The development of a theoretical framework centring on expanded concepts of ‘defamilisation/familisation’ allows the identification of relevant employment-related, childcare and eldercare policies (independent variables) argued to influence gender equality outcomes. These policies form the basis from which numerous propositions are formulated and later tested. Following this, a gender equality index is developed capturing specific gender equality outcomes (dependent variables) deemed relevant to the reconciliation of wage and non-wage care labour. The gender equality index is argued to improve established gender equality indices by including eldercare responsibilities and positioning non-wage care labour alongside wage labour. After calculating gender equality scores for 20 countries, five cases were selected on the basis of their differing outcomes: Austria was identified as the ‘Low Type’, the United Kingdom as the ‘Medium-Low Type’, Slovenia and Lithuania both as ‘Medium-High Type 1’ cases and, finally, Sweden as ‘Medium-High Type 2’. Subsequently, data on the countries’ policies are analysed and used to test and refine the formulated propositions. A summary of the findings is provided and complemented by a discussion on the potential origins of gender (in)equality in the respective countries going beyond policy configurations to include historic-institutional factors. This discussion refines the theoretical framework by emphasising the relevance of class for gender equality and thus points to relevant aspects in need of further research.
1. Introduction

This Master thesis offers a comparative analysis of European welfare state’s child- and eldercare policies and their effects on gender equality. The aim is to pinpoint policies or policy configurations advancing or undermining gender equality, specifically in the division of wage and non-wage care labour, which may explain the differences in gender equality outcomes across European countries.

To state from the start, non-wage care is understood as comprising unpaid affective and material labour including *domestic* activities (cooking, cleaning, washing, etc.), care directed at *children* (nurturing, dressing, grooming, taking to school/doctors appointments, helping with home work, etc.) and care provided to *elderly* dependents (personal hygiene, support in daily activities, organising/taking to doctors appointments, etc.).

The general claim made in this thesis is that when welfare states universally support families with public service provisions for the care of children and the elderly, gender equality will be higher. Through state provision of services care responsibilities are collectivised, which reduces financial and care dependencies within families and allows those individuals predominantly expected to provide intergenerational care – women – to invest more in their professional and personal development and achieve greater economic independence and security. In addition, this thesis recognises care as a form of labour and seeks to contribute to a refined understanding of it as such. The argument is made that although usually preformed without pay, care forms the foundation of a functioning society: “[w]ithout it there could be no culture, no economy, no political organization.” (Fraser, 2016: 99) Narrowing in on aspects of social justice and economic considerations, arguments are provided supporting the recognition of care as labour. While the gender-unequal division of childcare has received ample attention in previous literature, the effects of (lacking) eldercare provision on gender (in)equality remain under-researched. This thesis thus makes a notable contribution by factoring in gender inequalities emerging from the gendered division of child- and eldercare.

This first chapter addresses the level of gender inequality existing across Europe and discusses the societal and economic benefits to be gained by increasing gender equality. The chapter ends with a discussion of conceptual limitations of this thesis and provides responses to anticipated criticism of the method used. The second chapter presents the theoretical framework and introduces the concepts of ‘defamilisation and familisation’, which offer a basis for theoretically assessing the effects of certain policies on gender equality outcomes. Multiple policy dimensions are discussed which support or undermine the reconciliation of
wage and care labour and hence affect gender equality. The emerging relevant policy dimensions are treated as independent variables. The discussion of independent variables leads to the formulation of propositions, which are later tested and refined. The third chapter discusses various gender equality outcomes, treated as dependent variables. Moreover, in this chapter a new gender equality index is developed, argued to fill the lacuna left by other established gender equality indices. The proposed gender equality index is applied to 20 countries and enables the selection of five countries exhibiting notably positive or negative scores for further analysis. The countries’ relevant policy dimensions are analysed to test and discuss the formulated propositions. A summary of the results follows and the thesis ends by returning to a refined discussion on the different origins of gender equality by looking at historic-institutional factors influencing the gendered division of wage and non-wage care labour. The results and insights revealed can benefit decision-makers committed to reforming policies aiming at transforming gendered roles and moving towards a more egalitarian society.

1.1 Gender Inequality Across Europe

This section briefly addresses the high level of gender inequality existing in Europe. The argument is made that despite being increasingly more qualified than men, women remain underrepresented in the labour market and politics in general and overrepresented in low-paid jobs in particular. This in turn threatens their economic independence and security while simultaneously undermining their self-development. In chapter two, when introducing the theoretical framework, these general arguments will be developed in more detail and depth.

In 2014, more women than men graduated on average from higher education institutions in nearly every EU-28 country (OECD, 2016a: 71). Yet, women’s labour market participation rates remain lower than men’s across EU-28 countries (OECD, 2017a) while gender wage gaps\(^1\) prevail (OECD, 2017b). The latter is intensified by women on average occupying jobs of lower quality,\(^2\) resulting in an overrepresentation of women in low-wage jobs (ILO, 2016a: 39, 52). Unsurprisingly, women in Europe consequently remain at higher risk of poverty or

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1 Defined as “the difference between median earnings of men and women relative to median earnings of men. Data refers to full-time employees and to self-employed.” (OECD, 2017b)

2 According to the ILO, “[t]he quality of work is largely determined by terms regulating working conditions and access to social protection [...] and work-family policies, namely, measures to help workers with care responsibilities for dependent family members to secure, retain and make progress in employment without discrimination” (ILO, 2016: 39).
social exclusion than men (Eurostat, 2016). Additionally, women’s political power remains low – across the EU-28 only 29.1% of women were members of single or lower house national parliaments in the first quarter of 2017 (EIGE, 2017a.), while at the same time merely 37.3% of European Parliament members were women (EIGE, 2017b). Though writing in 1949, de Beauvoir’s cogent observation still applies today:

“Economically, men and women almost form two castes; all things being equal, the former have better jobs, higher wages and greater chances to succeed than their new female competitors; they occupy more places in the industry, in politics and so on, and they hold the most important positions.”

(2015 [1949]: 29)

Though woman’s position in society has significantly improved since the 1950s, effective policies are still needed to bring about gender equality. When attempting to tackle gender disparities, the primary interest of policy-makers is often facilitating women’s entrance into the labour market, with the underlying goal of enhancing economic productivity and efficiency (Lewis, 2006: 52; Daly, 2007: 75; Bettio et al. 2013: 2). Economic advantage takes centre stage, while the necessity of supporting social reproduction through effective social policy is pushed to the margins (Fraser, 2016: 99). However, “look[ing] at the system of work is to look at half the problem. The other half occurs at home.” (Hochschild, 2003 [1989]: xiii) Hochschild notes that women often find themselves faced by a “second shift” when coming home from their employed job to tend to the home and children (2003 [1989]: 4). She rightfully attributes the unpaid childcare and domestic work as being performed predominantly by women as a “second shift”, yet their responsibilities do not end there. Studies demonstrate that women provide more frequent and intense support to elderly dependents than men across countries (Schmid et al., 2011; Colombo et al., 2011). Not only are women taking care of children while engaging in wage labour voluntarily or out of need, they inherit a third care burden when elderly relatives are dependent.

“Historically, these processes of ‘social reproduction’ have been cast as women’s work, although men have always done some of it too.” (Fraser, 2016: 99) When compelled to

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3 This indicator describes individuals affected by one form of poverty, while three interrelated forms are distinguished: monetary poverty, material deprivation and low work intensity (Eurostat, 2016). An exception to the gender gap in risk of poverty and social exclusion is Spain, where men find themselves at a higher risk (Eurostat, 2016).
assume the role of the foundational caretaker of the home and the foundational caregiver of the young and elderly, women are compromised in their economic independence and self-realisation. To manage these intergenerational care responsibilities, women either reduce working hours or forgo employment if a “partner in the salariat” (Standing, 2016 [2011]: 69) is available to economically depend on. Compromising women’s independence and chance for professional self-realisation engenders unequal power dynamics within relationships. In case of separation or loss, women (as well as their young and elderly dependents) become at risk of poverty and social exclusion by having their source of economic security revoked. Simultaneously, female single breadwinners find themselves in equally unfavourable circumstances; if prioritising economic security by working, they are unable to provide the necessary care for their dependents. Otherwise, they find themselves at risk of poverty when reducing their workload to manage care responsibilities. This is rooted in the fact that “any situation reducing income such as low work intensity [or] working part-time, [...] increases the risk of poverty despite working.” (Eurostat, 2016) The disadvantages faced when attempting to secure a decent living through the labour market are accompanied by constraints in the reconciliation of economic production and social reproduction. Commodified women (and men) are employed under conditions of limited social protection where the emphasis lies on economic productivity while undermining reproductive labour. Yet, as argued in the next section, reproductive labour is essential to the sustainability and functioning of any given society.

1.2 Benefits of Gender Equality for Society

In this thesis, the case is made that the gender-unequal distribution of wage and non-wage care labour and other forms of gender inequality mainly stem from the inadequate response of labour market practices and social policies to the changed societal and demographic structures (Gornick & Meyers, 2009: 4). These policies remain inherently informed by the male breadwinner/female caregiver model, disadvantaging not only women but society at large by undermining social reproduction and subsequently economic production. Building on Polanyi, Fraser notes that “[n]o society that systematically undermines social reproduction can endure for long. [...] The result is a major crisis, not simply of care, but of social reproduction in this broader sense.” (2016: 99) We see this taking shape in the form of low fertility rates in societies where the relative share of older people is constantly increasing.

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4 See Asher describing the mother as “the foundation parent” (2011: 6).
Supporting gender-egalitarian caregiving and the reconciliation of social reproduction and economic production through adequate policymaking is vital for the sustainability of the welfare state. By implementing policies, which enhance the reconciliation of production and reproduction, the supply of wage labour can be increased in the short and long run (Bettio et al., 2013: 3). One the one hand, facilitating women’s entrance into the labour market entails a greater use of women’s human capital, higher economic productivity and lower risks of poverty (Esping-Andersen, 1999: 70). On the other hand, by offering adequate social protection and supporting the distribution of care responsibilities more equally across society, fertility rates are more likely to increase, securing the labour force of the future. In light of the ageing population, both of these factors – production and reproduction – are crucial to securing “the basic financial viability of the welfare state in the future.” (Esping-Andersen, 1999: 70)

1.3 Conceptual Limitations
Several general conceptual limitations this thesis encounters must be mentioned from the start. First, this thesis employs a binary distinction of gender and of sex. It is recognised, however, that not all individuals identify as either a woman or a man. Queer-theory sensitises us to be wary of such binary simplifications, which cannot be generalised across society. The call is therefore made for the incorporation of queered understandings of gender into further welfare state theory. Second, to examine the gendered divisions of labour within families, this thesis focuses primarily on heterosexual couples. This wrongly puts forwards notions of heteronormativity, despite the fact that “[g]ender norms and family forms are highly contested, finally.” (Fraser, 1994: 592) Comprehensive welfare state research should pay more attention to non-conventional family models – be it lone-parents, same-sex (married and unmarried) parents, childless couples, and other (polygamous) domestic arrangements – and individuals living alone. Third, this thesis generalises women and men while not fully appreciating intersecting inequalities, such as race-ethnicity, religion, sexuality, age, and marital status. It is understood, that individuals are affected differently by welfare state policies along these intersections, in that they “generate different outcomes for differently situated people” (Fraser, 1994: 600). While, to a certain extent, class inequalities are incorporated into the theory presented here, further welfare state research should include the different ways gender inequality is experienced on the basis of other intersecting inequalities. Lastly, focusing on care implies “taking into account both sides of the care coin: care givers and care receivers” (Leitner & Lessenich, 2007: 259). However, this research is limited to the
perspective of the familial and non-familial caregiver. This does not allow for the full complexity of the concept of care to be captured in all its facets (Leitner & Lessenich, 2007: 257, 259). Further research will have to complement the presented work by including the care-receivers’ social, emotional and economic dependence and how policies affect the quality of the care received.

The main reason for not addressing these limitations comprehensively is related to feasibility, primarily time constraints. Moreover, the available datasets are almost all based on gender binary categories. Where applicable, the conceptual limitations are highlighted throughout this thesis when analysing policy regulations or gender equality outcomes, calling upon further research to include them more comprehensively.

1.4 Anticipated Methodological Criticism And Responses

Several criticisms of the methods employed in this thesis are anticipated. In this section, each methodological criticism is first set out, followed by an explanation of how the limitation is acknowledged if not countered.

First, using aggregated as opposed to disaggregated data undermines comprehensive comparability and interpretability since the underlying individual concepts, definitions, and measurements cannot be analysed for consistency guaranteeing efficient comparability, influencing the robustness of the results (Kittel, 2006: 651). The time constraints and a lack of data availability do not allow for the collection and use of disaggregated data. Hence, in certain cases the data sets used are limited in their comparability as discrepancies of definitions and shortcomings in measurement are identified. In these instances the shortcoming are highlighted and further research is called upon to bridge the gap.

Secondly, a further limitation relates to “the problem of confounders: we do not know which non-observed factors disturb the causal inference.” (Kittel, 2006: 651) In other words, while theorising that certain policy dimensions affect gender equality outcomes, this causal relationship cannot be tested statistically. It is likely that countries’ individual histories, cultural norms and beliefs contribute to the outcomes, as well as the policy dimensions tested. If more time had been available and recent historical data on different countries’ cultural norms and beliefs were accessible, a more accurate description of such processes and their potential effects on gender equality outcomes could have been included as independent variables. However, since these mechanisms are not accounted for, this thesis does not allow for the confounder-problem to be solved statistically. However, when discussing the findings in section 4.5, attempts are made to bring non-policy dimensions in and move from
correlation to causation through deductive argumentation based on a brief analysis of the respective countries’ historical and institutional factors. The potential explanatory power of these factors in determining gender equality outcomes is discussed in comparison with the observed policy dimensions. It is argued that further research will profit from a comparative historic-institutional analysis considering a wider range of economic factors (such as wage-settings, collective agreements, etc.), which may have second-order effects on gender equality by influencing the class system.

Third, Kreuger and Neumann claim that generalisability is only permitted when cross-national research includes measurements of variables across a large number of nations (>40) (2006: 439). As Rueschemeyer points out, it is true that research based on a small number of cases cannot generate “universally applicable social theory whose propositions are substantively meaningful […] independent of time and place.” (2003: 332) Consistent with this, the findings generalised through the proposition testing in this thesis are only interpreted within the context of the analysed countries and not for all countries at all times.

Fourthly, Kreuger and Neumann claim that with comparative analysis theory cannot be tested (2006: 438). Contrary to this, Rueschemeyer argues that by formulating propositions theory can indeed be tested through the comparative analysis of only a small number of cases and can “offer persuasive causal explanations.” (2003: 310) In this thesis, before looking at the cases specifically, an in-depth and detailed engagement with the theory is conducted, enabling the generation of a wide range of propositions based on numerous policy dimensions identified as relevant to gender equality. Formulated into propositions, existing theory is subsequently tested and refined against a small number of cases. The advantage of small-n cases is that it allows the researcher to analyse the cases in much greater detail, than with a 40-country study for example. What is more, rather than simply rejecting or accepting the propositions with finality upon data analysis (as is typically the case with hypotheses), propositions enable the researcher to move beyond the data first analysed. Through discussing potential explanations of the findings with detailed reference to the cases, theory can be tested as well as refined (Rueschemeyer, 2003: 310). As Rueschemeyer describes it with comparative historical analysis, it is “this dialogue between theory and evidence that constitutes the comparative advantage” (2003: 312) of comparative welfare state analysis. The analysis of factors besides the policy dimensions initially considered in the cases studied supports Rueschemeyer’s observation that individual cases can offer more than one theoretically relevant observation (2003: 332).
Specifically, by choosing a handful of countries varying in their gender equal outcomes allows for an analysis and acknowledgment of diverging historic-institutional contexts contributing to these outcomes, which otherwise had been held constant (Rueschemeyer, 2003: 320). This type of in-depth analysis is only possible with a small number of cases. For instance, the countries selected for the policy analysis are Austria, the United Kingdom, Lithuania, Slovenia and Sweden, as they exhibited notably diverging scores in gender equality outcomes. The comparison of Lithuania and Slovenia lead to the appreciation of their (soviet)communist past and their deviating transition trajectories and how they potentially bared differently on gender equality. An analysis of a large number of similar Western European countries may have held historical capitalist developments constant. Hence, although the case selection was limited to five countries, the diversity of them led to the acknowledgement of historic-institutional contexts alongside specific policy landscapes, refining the framework for further research.

In sum, this research contributes to testing and refining gender equality and comparative welfare state theory through in-depth analysis of a broad range of interrelated social and labour market policies and how they bare on the gender equal reconciliation of wage and non-wage care labour for individuals providing care to children and to the elderly.
2. Defamilisation, Gender Equality and Welfare State Analysis

To analyse the effects of financial and care dependencies and how welfare states address these issues, the concept of defamilisation was developed through different phases of feminist contributions. The concept has been applied in comparative welfare state research to analyse country’s policies, (dis)encouraging the reconciliation of wage and care labour, thereby undermining or fostering gender equality.

Defamilisation initially emerged as a critical response to Esping-Andersen’s welfare state typology elaborated in *The Three Worlds of Welfare Capitalism* (1990). He developed a threefold typology of welfare regimes including the *liberal*, the *corporatist-conservative* and the *social democratic* welfare regime. The analysis comprised 18 countries, which were classified into one of the regime types, based on the degree of decommodification offered by their social security programmes (i.e. unemployment and sickness/disability benefits and public pensions). Through focusing on eligibility, income replacement and range of entitlements, Esping-Andersen (1990) considers a welfare state strongly decommodifying when it – through the provision of generous and universal social programmes – decreases individual’s dependency on the labour market to guarantee an acceptable standard of living (1990: 47ff). Accordingly, decommodifying social programmes are offered universally and generously (as seen in social-democratic regimes like the Nordic countries), leading to an increased bargaining power of the individual versus the employer (1990: 48ff). In addition to the concept of decommodification, he develops the concept of stratification. Esping-Andersen analyses welfare states’ redistributive capacities as it is considered to be “a system of social stratification” (1990: 55) since the developed social security policies affect the structuring and restructuring of class and status orders within a society. He identifies three principles underlying different types of stratification mechanisms, which align with the regime types identified through the different degrees of decommodification in welfare states (1990: 77). First, the *liberal* type is characterised by the importance of markets for social security (pensions and health care) as well as means-tested poor-relief benefits (1990: 73). The liberal state withholds from “altering the stratification outcomes produced in the market place.” (1990: 62) Secondly, the *conservative* type preserves traditional status relations through offering differentiated social security benefits (such as pension schemes) based on occupational and status fragmentations (1990: 69). This type privileges individuals in the civil-service sector by offering more generous social insurance schemes. Lastly, the *socialist*  

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5 Lohmann and Zagel (2015) speak of the emergence, consolidation and critical assessment phase in the development of the defamilisation concept.
type emphasises solidarity, which takes shape in universally accessible social security systems offering equal benefits, regardless of occupational or income status (1990: 69). While Esping-Andersen’s concept of stratification holds great potential for examining the reproduction of status differences between women and men, the effects of social policy on gender (in)equality do not systematically enter the analysis. It must be said though that, when concluding his book, Esping-Andersen briefly addresses potential conflicts emerging through different stratification mechanisms in three post-industrial societies – Sweden, Germany and the United States. When discussing Sweden, he predicts the emergence of “economic warfare” between the genders due to sectoral gender-segregation reflected in men being mainly represented in the private and women in the public sector. Since the sustainability and increase of public employment entails wage moderation, it will disadvantage public employees, i.e. predominantly women (1990: 227). Despite the accurate remarks on gender-conflicts in Sweden, the main focus of Esping-Andersen’s theories lies in analysing the reproduction of status differences amongst (male) labour market participants. Surprisingly however, the feminist critiques directed at Esping-Andersen’s theory mostly centred around the concept of decommodification, although their critique of it can, for the most part, be applied to the concept of stratification as well.

Critics charged his theory to be inherently androcentric: it departs from a male standard through presupposing individuals to be in a full-time, standard employment relation (SER). Among others, Orloff (1993) criticises Esping-Andersen for ignoring gender relations when analysing the relationship between the state and the market, as it understates the non-state provision of welfare through the family (Orloff, 1993: 310). She argues that “[p]rovision of welfare “counts” only when it occurs through the state or the market, while women’s unpaid work in the home is ignored.” (1993: 312) While in his typology Esping-Andersen does to some extent acknowledge childcare services and tax systems affecting the encouragement of women’s reconciliation of wage and non-wage care labour his “regime types do not fully predict women’s employment patterns” (Orloff, 1993: 312), such as inactivity and part-time employment. Thus, his typology disregards the constraints faced by women attempting to enter the wage labour market and secure a paid living independent of household responsibilities (1993: 322-323). With women’s access to the labour market heavily compromised, women become economically dependent on male breadwinners or the state. In order for women to benefit from any decommodifying policies, women must first be commodified (Orloff, 1993: 318). Orloff’s analysis convincingly argues for an expansion of the decommodification concept to include gender relation and inequality dimensions. Her
critique thus contributed to the emergence of the concept of defamilisation. However, while Orloff stressed women’s right to work and economic independence, other feminist thinkers expanded the concept of defamilisation by including the importance of independence from caring responsibilities and the freedom to choose who cares (mentioned in Lohmann & Zagel, 2015: 3). Through these valuable contributions, defamilisation was developed into a multifaceted concept, which can now be defined as the extent to which “welfare state provisions (social policies and regulations) [...] reduce care and financial responsibilities and dependencies between family members.” (Lohmann & Zagel, 2015: 5). Along with the concept of defamilisation emerged the concept of familisation. These two concepts should not be understood as opposites, as one welfare state can exhibit both familising and defamilising policies (Lohmann & Zagel, 2015: 6), especially since child and elderly care policies can be conflicting in regards to how they affect the allocation of care responsibilities. Furthermore, the absence of one type (e.g. defamilising policies) does not inevitably entail the presence of the other (e.g. familising policies). Familising policies are constituted by their potential for reinforcing and encouraging family dependencies, through the (attempted) reduction of their negative consequences (see Leitner, 2003; Leitner & Lessenich, 2007; Saraceno & Keck, 2008, 2010; Lohmann & Zagel, 2015). These two concepts have been used to derive ideal-typical patterns of policy landscapes and welfare state typologies.


The first pattern is labelled familism by default, which occurs when the family is assumed to care since no publicly provided alternatives are offered. The costs for caring are allocated to the family as financial support for caring (care allowances, tax deductions, cash-for-care payments, etc.) is non-existent. Following Saraceno and Keck (2008; 2010), higher degrees of familism by default tend to increase gender inequality as women predominantly assume the role of caregiver and men the role of breadwinner (2010: 677). Welfare states informed by familism by default are comparable to Esping-Andersen’s liberal stratification type in that the emphasis lies on market provisions. By not offering publicly funded care services, families have to turn to the private market when wanting to reduce the care burden.

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6 Such as economic and social dependencies (women depending on the male breadwinner, children on their parents and adults depending on their children or other relatives).
This in turn leads to class inequalities emerging in that privately purchased care services are not (easily) accessible to lower income class families due to limited financial resources.\(^7\) Subsequently, gender inequalities in lower income classes are strengthened. Ultimately, care needs to be provided by the family, in turn predominantly burdening women. Additionally, the privatisation of care services risks the emergence of class exploitation in the care sector, as non-familial caregivers compete on a low-wage basis for profitability (Morgan, 2005: 248ff; Sainsbury, 2013: 330). Since technological advances cannot increase productivity in the care sector, the only way to save costs is by minimising the personnel costs, which “make up nearly the entire budget of most centers.” (Morgan, 2005: 248) In this regard, Morgan (2005) highlights the risks posed to non-familial caregivers in the formal economy,\(^8\) Sainsbury (2013) addresses those faced by caregivers (often immigrants) in the informal economy. Similar consequences, however, are identifiable for both cases. First, both forms of employment become precarious through the low-wage, flexible employment relation often entailing restricted or no access to social security programmes (Morgan, 2005: 251; Sainsbury, 2013: 331). This in turn will threaten the non-familial caregiver’s economic security and results in them depending highly on the (in)formal labour market, implying low degrees of decommodification. Secondly, the quality of care services will likely decrease when running on a low-wage workforce, as the entrance barriers to employment are low (i.e. no vocational qualifications/training required) (Morgan, 2005: 244, 249). Thirdly, the value of care is downgraded, leading to a vicious cycle:

> “as long as care is devalued and poorly paid, it is more likely to be done by those who lack resources and status (women, minorities, and immigrants), and if care work is disproportionately performed by these groups their caring activities are further devalued.” (Sainsbury, 2013: 331)

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7 Ulmanen and Szebehely (2015) make a valuable contribution by capturing the emergence of class and gender inequalities due to privatisation of elderly care services in Sweden. In regards to publicly financed services, they show that the more generous (i.e. universal) and intense these care services, the greater the defamilisation potential for both the caregiver and the care-receiver (2015: 81). Although the authors take a fragmented approach by only focussing on the elderly care system, similar mechanisms can be theoretically translated to the privatisation of childcare services.

8 Morgan (2005) exemplifies this by drawing on the example of the United States, considered a liberal welfare state regime. While she, too, take a fragmented approach in only addressing childcare services, similar mechanisms are implied in regards to eldercare services.
The second pattern is titled *supported familialism*, describing policies supporting and strengthening family members’ financial and care responsibilities by the state granting financial transfers, such as care allowances, tax exemptions and paid leaves (Saraceno & Keck, 2010: 676). As shown by Korpi (2000), it can be said that offering financial transfers instead of services generally strengthens the gendered division of care responsibilities; greater incentives exist for women to take the care allowances and paid leaves (for child and elderly care) since gender unequal structures reduce the opportunity costs of foregoing employment for women compared to men. Therefore, this second pattern can be compared to corporatist stratification principles in that traditional status orders are maintained. Furthermore, supported familialism also strengthens class inequalities as higher income class families can more easily access the private market to purchase care services. This leads to the same unfavourable mechanisms (mentioned in regards to familialism by default) to kick in: gender inequalities in lower income classes are reinforced, class exploitation in the low-wage, (in)formal care sector is increased, undermining decommodification and deteriorating the value of care labour.

The third pattern, *optional familialism*, is characterised by the existence of options to organise care according to preference: either publicly financed care services can be used (defamilisation) or in lieu a payment is made to compensate (supported familialism) the informal care provided by the family (Saraceno & Keck, 2008: 9). This third variant therefore represents a mixture of patterns (Saraceno & Keck, 2010: 677).

Finally, *defamilisation* occurs when care responsibilities of the family are reduced through the provision of care services. While these services can be provided through the state or the (subsidised) market, a conceptual differentiation between the two types of provision must be made (Saraceno & Keck, 2010: 677). As pointed out by Saraceno and Keck, “[d]e-familisation via the market may be the result of both familialism by default and of supported familialism” (2010: 677). The reduction of care responsibilities (i.e. the level of defamilisation) is made dependent on the financial resources of families, since vouchers and other financial transfers by the state only allow families to outsource their care responsibilities to a certain extent. Financially strong families can sufficiently ease their care responsibilities leading to the deepening of class as well as gender inequalities as discussed above. For defamilisation to be universal, the welfare state needs to be informed by socialist stratification principles identified by Esping-Andersen (1990). This implies universal access to affordable care services and social protection regardless of income and occupational status. Thus, universally defamilising policies are provided via the state or volunteer/non-profit organisations as they universally collectivise care responsibilities across all income classes.
Additionally, publicly subsidised services are important when considering the working conditions of the non-familial care labour force. When financed publicly, the non-familial caregivers are more likely to be high-skilled, well-paid and protected through the social security system (i.e. decommodified) lessening the risk of exploitation and poverty (Morgan, 2005: 244). Furthermore, publicly financed care services upgrade the value of care, due to qualifications being required for entrance into the labour force, which contributes to lowering wage differentials. This is important in light of care services being subject to the “cost disease” (Baumol, 2012). This refers to an issue addressed previously: while technological advances allow for cost reductions throughout most of the economy, increases in productivity (i.e. labour-saving change in the productivity process) in care services (alongside education and other health care services) are close to impossible. This results in care services becoming increasingly unsustainable as relative real prices soar (Baumol, 2012: 19ff).

Scharpf argues that these services therefore run the risk of being crowded out of the market, unless certain intervening mechanisms kick in: by publicly financing these care services, the sector can expand despite low productivity (1990: 35). This is rooted in the fact that through public financing, low wage differentials across sectors can be maintained, securing and increasing the supply of non-familial care services (Scharpf, 1990: 35).

In light of the various familising tendencies of policies across countries “[f]eminist writings often argue that the welfare state, […] is patriarchical, and that a major overhaul of policy is necessary in the quest for gender equality.” (Esping-Andersen, 2003: 599) It must be noted, however, that policy reforms can only be effective in terms of defamilisation (i.e. gender equality) when fully recognising another crucial argument stating “that reproductive labor, unpaid care work, and the ideology of domesticity are at the heart of women’s oppression” (Sainsbury, 2013: 313). This calls for inequalities occurring in the home (i.e. gender-unequal distribution of care) not to be considered a problem of the so-called private, but of the public sphere (Fraser, 1994: 600). The separation of these spheres is historically rooted in the gendered division of wage and non-wage care labour (Daly & Lewis, 2000: 283-284). In other words, “capitalist societies have separated the work of social reproduction from that of economic production” (Fraser, 2016: 102), marginalising the societal importance of care. Therefore, when advocating an equal division of wage and non-wage care labour, we must simultaneously advocate the elimination of the separation of spheres. When aiming at an increase in female labour participation (i.e. facilitating women’s entrance into the labour market as the public sphere), this objective can only be successful when appreciating that the marginalisation of women is reproduced through the unequal distribution of care.
responsibilities between the sexes (Daly & Lewis, 2000: 283). It is argued here that only when the significance of intergenerational care is fully recognised and targeted through a coherent policy landscape can increased gender equality be brought about. As pointed out by Lohmann and Zagel: “conflicting reform aims and outcomes arise where support for the commodification of women does not include support for easing care responsibilities.” (2015: 4)

Another important aspect related to the separation of spheres is that care is not always conceptualised as a form of labour. Yet the International Labour Organization (ILO) underpins the importance of recognising it as such in their 2016 report when demonstrating that: a) women predominantly contribute to unpaid work⁹ and b) women have longer working days than men when taking both paid and unpaid labour into consideration (ILO, 2016a: 19). Furthermore, taking the unpaid family household activities performed in Europe together has shown to amount to a value between 27.7% and 36.8% of EU GDP, depending on the methodology applied (Giannelli et al., 2012). As mentioned before, while such reproductive work is indispensable to society as it forms “the condition for the possibility of economic production in a capitalist society” (Fraser, 2016: 102), it is mostly provided on a non-wage basis. In today’s capitalist society, however, money and ultimately the wage form a “primary medium of power” leading to a culture in which non-wage care labour is considered of lesser social value (Fraser, 2016: 102). This leads individuals performing care labour (i.e. predominantly women) to be structurally subordinate to the wage labourer (i.e. predominantly men), despite its indispensable nature (Fraser, 2016: 102). Therefore, conceptualising and recognising care as a form of labour is crucial to the “recognition of women’s social contribution and equality” (Jenson, 1997: 184).

The recognition of care as a form of labour in addition calls for the redistribution of resources, which in turn reduces the socioeconomic injustices (exploitation of labour, economic marginalisation and material deprivation) experienced disproportionately by women (Fraser, 1997: 16ff). This may be achieved through compensating caregivers via care allowances and granting non-wage caregivers universal access to social security programmes (such as sickness insurance and guaranteed pensions), therefore strengthening the value of care labour vis-à-vis wage labour. However, there are certain gender equality dilemmas associated with care benefits, as they provide greater incentives for women to be the primary

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⁹ International Labour Organization (ILO) recognizes that “unpaid work is work that produces goods and services for household consumption, which includes […] cooking, cleaning and also providing care for children, the elderly and other dependents.” (ILO, 2016a: 19)
caregiver since opportunity costs of forgone employment are lower for women than men. This is due to prevailing gender inequalities in the labour market (e.g. women hold lower-quality jobs, earning less than men, etc.). If women remain predominantly assuming care responsibilities even when it is to some extent recognised as labour through care allowances, the traditional gender order is reinforced and the social value of care barely improved. In other words, gender differentiations are perpetuated rather than transformed leading to cultural injustices (cultural domination, non-recognition and disrespect) prevailing (Fraser, 1997: 23ff). Hence, in any case, it is of great importance that care responsibilities are distributed equally across society and the state.

Upgrading the societal value and recognising the importance of care may also affect the non-wage caregivers’ self-identity and position in the class hierarchy; in this sense redistribution would imply recognition. The various potential gains and dilemmas emerging from this, however, cannot be fully developed at this point.\(^\text{10}\) Rather, attention is draw towards another consequence of recognising care as labour: doing so highlights the fact that care is subject to certain working conditions. It therefore “makes an analysis of the role of the welfare state indispensible and leads especially to consideration of whether care is paid or unpaid, formal or informal, and the state’s role in determining these and other boundaries.” (Daly & Lewis, 2000: 285) Finally, it allows an approach to welfare state theory, which puts wage and care labour at the centre of analysis and hence takes gender relations into account. Such an approach lays the stepping-stones to inform adequate policy-making, which will bring about gender equality in a more effective manner.

While childcare responsibilities have rightfully received ample attention in welfare state analysis and gender equality theory, elderly care remains under-researched (Sainsbury, 2013: 319; Lohmann & Zagel, 2015: 11). Most academic studies take a fragmented approach in either considering childcare or eldercare policies\(^\text{11}\) (Daly & Lewis, 2000: 286; Saraceno & Keck, 2008: 5; Sainsbury, 2013: 320). This fragmentation is reflected in established indices\(^\text{12}\) aiming at measuring gender (in)equality, which insufficiently address the unequal share of

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10 See Fraser (1997: 11-39) for a philosophical discussion on the dilemmas of recognition and redistribution in relation to socioeconomic and cultural injustices.


12 By the EU’s European Institute for Gender Equality (EIGE), the United Nations Development Programme (UNDP), Social Watch, World Economic Forum (WEF), Organisation for Economic Cooperation and Development (OECD), Dijkstra & Hammer (2000), Plantenga et al (2009), Bercicat (2011). As discussed below, only two of these indices capture care responsibilities while, however, only focusing on childcare.
care responsibilities towards elderly dependents preformed predominantly by women. However, eldercare is already shown to have negative impacts on gender equality (see Schmid et al. 2011; Colombo et al. 2011; Ulmanen & Szebehely, 2015), and the dimension of elderly care is steadily increasing in importance. Demographic, economic and societal pressures continuously intensify the need for elderly care, urging welfare states to adapt. Today, we are faced with an ageing population, fertility rates are low, austerity measures seek to individualise care responsibilities, and women are (rightfully) trying to part from traditional gender roles (Daly & Lewis, 2000: 288; Daly, 2000: 508, Saraceno & Keck, 2008: 5). Hence, these pressures “have acted to effectively decrease the supply of care at a time when the demand is rising.” (Daly & Lewis, 2000: 288) However, the response of various governments follows austerity principles, which only add to fuel to the fire. Paradoxically, while governments try to direct care responsibility to (certain members of) the family in order to contain care costs, quite the opposite is achieved in the long run. The loss of economic potential will outweigh the short-term cost savings by far when childcare and eldercare policies maintain their familialising tendencies. First, the share of increasingly well-educated and high-skilled women dropping out of the labour market to care for children and the elderly implies a significant loss of human capital. Second, low fertility rates imply insufficient reproduction of the labour force as the very foundation of the economy. Thus, providing adequate eldercare (as well as childcare) services implies securing human capital and fertility rates and hence an increase in productivity in the long run. While at first glance it seems that governments prioritise profit and productivity over gender equality, at second glance their logic seems to even go against economic reasoning. The case is made that prioritising universally defamilising child and eldercare policies will strengthen the economy, secure the sustainability of welfare states and moreover, increase gender equality across society facilitating women’s right to independence and self-realisation.

2.1 Defamilising Care Policies
The following section presents a discussion of policy dimensions (independent variables) relevant to the reconciliation of wage and non-wage care labour and hence affecting gender equality. It is argued that these dimensions should be given special attention in policy-making in order to support a gender equal division of labour.

The relevant dimensions identified can be divided into three general categories: Employment-related, Childcare and Elder care Policies. After discussing the relevance of these policy dimensions within the general categories, propositions informed by the presented
theory will be formulated in the following section, summing up this chapter. The policy elements and designs will be judged in relation to their defamilisation potential. It will be assessed whether these policy dimensions reduce care and financial responsibilities and dependencies within the family and support a gender equal division of wage and care labour. In addition to the definition of defamilisation provided by Lohmann and Zagel (2015: 5), further elements are incorporated into the concept here: in addition to the potential to reduce financial and care responsibilities/dependencies it will be considered whether the policy designs recognise care as a public responsibility and as a form of labour. As mentioned above, only public care services can be regarded as universally defamilising; when "welfare states leave it up to individuals to arrange their family care, either privately or through the market, this means a lack of defamilizing policies." (Lohmann & Zagel, 2015: 6) Furthermore, when attempting to narrow in on the "conceptual boundaries of market-based defamilizing policies" difficulties emerge (Lohmann & Zagel, 2015: 6). This is due to the fact that third-sector providers offering publicly subsidised services are often involved and in certain countries municipalities are gaining importance in organising and contracting these forms of care.\footnote{See for instance Maarse & Jeurissen (2016) for the Dutch case, Bertelsen & Rostgaard (2013) for Denmark and Vabø & Szebehely (2012) for Norway and Sweden.} Therefore, the focus lies on different forms of publicly provided care services while market-based provisions are not considered.

Table 1 summarises the intergenerational care policies considered relevant for gender equality in this thesis. Each policy dimension will be discussed and explained in turn with references to the specific defamilising potential.

i) Employment-Related Policy

In order to operationalise the employment-related policy dimensions, three aspects will be taken into consideration: the Standard (Full-Time) Working Week, Birth-Related (Maternity, Paternity, Parental) Leaves Policies, and Family Leave Policy (to care for children and elderly).

As pointed out by Gornick and Meyers (2009), the regulation and reduction of the Standard Working Week (i.e. full-time work hours) has often been neglected in family-policy discussions (2009: 23). However, it is a relevant dimension in achieving gender-egalitarian divisions of wage and non-wage labour (Lewis, 2001: 164, Leitner & Lessenich, 2007: 248).
<table>
<thead>
<tr>
<th>Employment-Related Policy</th>
<th>Standard Working Week</th>
<th>Childcare Policies</th>
<th>(Pre-)Primary Education and Care Services (Ages 0-2; 3-5)</th>
<th>Universal Entitlement to Childcare Services for Children &lt; 3 Years (Yes/No)</th>
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<tr>
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<td>Duration of Maternity Leave (Weeks)</td>
<td>Full-Time (≥ 30 hours per week) Childcare Usage (Share of Children Age 0-2)</td>
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<td></td>
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<td>Maternity Benefit: Level of Compensation (Share of Earned Income)</td>
<td>Universal Entitlement to Childcare Services for Children Age 3-5 (Yes/No)</td>
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<tr>
<td>Paternity Leave</td>
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<td>Duration of Paternity Leave (Days)</td>
<td>Enrolment in (Pre-)Primary Institutions of Children 3-5 Years (Share of Children Age 3-5)</td>
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<td>Paternity Benefit: Level of Compensation (Share of Earned Income)</td>
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<td>Parental Leave</td>
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<td></td>
<td>Duration of Compensation (Months)</td>
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<td></td>
<td></td>
<td>Parental Benefit: Level of Compensation (Share of Earned Income)</td>
<td>Childcare Usage (Share of Children Age 0-2)</td>
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<td>Family Leave Policy</td>
<td>Duration of Net Paternity Leave (Months)</td>
<td>Educational Services</td>
<td>Begin of Compulsory Education (Age)</td>
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<td></td>
<td>Duration of Parental Benefit: Level of Compensation (Share of Earned Income)</td>
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<td>Financial Support</td>
<td>Attendance of Before- or After-School Childcare (Share of Pupils)</td>
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<td>Universal Entitlement to Child Allowance (Yes/No)</td>
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<td>Child Allowance for One Child (Share of Net Average Income)</td>
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<td>Child Allowance for Two Children (Share of Net Average Income)</td>
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<td>Child Allowance for Three Children (Share of Net Average Income)</td>
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<td>Tax Deduction for Families with Children (Yes/No)</td>
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<td>Eldercare Policy</td>
<td>Services</td>
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<td>Universal Access to Care Services (Yes/No)</td>
<td>Share of Dependent 65+ Population in Institutional Care</td>
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<td>Share of Dependent 65+ Population in Homecare</td>
<td>Share of Dependent 65+ Population Without Formal Services</td>
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<td>Share of Dependent 65+ Population Receiving Exclusively Cash Benefits</td>
<td>Financial Support</td>
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<td>Minimum Income Provision for Single Elderly (Share of AROP Threshold)</td>
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<td></td>
<td></td>
<td>Minimum Income Provision for Elderly Couples (Share of AROP Threshold)</td>
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</tbody>
</table>

Table 1. Overview of Intergenerational Care Policy Dimensions.
Lowering the required working hours allows women and, more importantly, men to allocate more time to caregiving whilst protecting full-time wages and social contributions – hence, economic security. A reduction in men’s standard working hours may be fruitful as it increases the likelihood of more equal time allocations between partners (Gornick & Meyers, 2009: 24). Women wishing to work less are not confronted with the consequences of changing to part-time employment, which often entail reduced career opportunities (such as promotion), wages and social benefits, as mentioned by Gornick and Meyers (2003: 147). Reduced working hours are considered defamilising since pressures to forego full-time employment in order to tend to care responsibilities are reduced. In other words, it is argued that reducing the working hours per week eases the reconciliation of wage and non-wage care labour.

The second employment-related policy dimension chosen comprises birth-related leaves, which can be divided into three existing types: Maternal, Paternal and Parental Leaves.¹⁴ The first type of leave is granted to mothers (to be) before and after childbirth. Paternity leave describes time given off work to fathers before and/or after childbirth. Finally, parental leave can be granted to either parent or both for a certain period of time following the maternity/paternity leaves (Gornick & Meyers, 2003: 112). These types of leaves can generally be said to have a job-protecting function through “reducing the penalties which the market would otherwise impose on those who spend their time care-giving.” (Daly, 2002: 257) In addition to this, paid leaves “play a positive role to the extent that it legitimises care as work” (Daly, 2002: 266). Leave policies affect the reconciliation of employment and parenthood, but the concrete defamilising effects can be said to vary depending on the specific policy design (Lohmann & Zagel, 2015: 6). Hence the defamilising or familising potential depends on factors such as duration, level of compensation and whether incentives for men to take paternity/parental leave are in place (Daly, 2002: 257; Gornick & Meyers, 2009: 22; Sainsbury, 2013: 322). Paid maternity or parental leaves of short/moderate duration tend to increase mothers’ employment and return rates as well as decrease the motherhood wage penalty (Sainsbury, 2013: 322). Long unpaid maternity/parental leaves, however, have been shown to incentivise mothers to stay home (mentioned in Lohmann & Zagel, 2015: 6), therefore reinforcing the gendered division of wage and care labour. As a result of being made

¹⁴ In light of various different family constellations, it should be analysed how different countries treat leaves for expecting same-sex (married) couples, single mothers and single fathers. Unfortunately, there is not scope in this thesis to discuss the implications for different constellations appropriately, although it is central to include family policy for different family constellations. It is recognised that looking at heterosexual couples is excluding and therefore limits the comprehensiveness of the thesis.
responsible for caring, long unpaid leaves likely entail women sacrificing or undermining their career opportunities: women returning from long leaves may encounter forms of job discrimination, such as motherhood wage penalties and being stereotyped as less committed to work, to name but a few (Correll et al., 2007; Morgan, 2009: 322). Subsequently, women’s economic independence and security is compromised, rendering them dependent on a (male) breadwinner.

If we aim at an egalitarian division of wage and non-wage care labour, leaves should be equally divided between women and men, which (unfortunately) requires incentives to be offered to men in the form of paternity/parental leaves to share care responsibilities. Ideally, this would imply on the one hand, the presence of “entirely non-transferable leave entitlements, meaning that recipients may not transfer their entitlements to their partners” which “substantially increases incentives for fathers’ participation.” (Gornick & Meyers, 2009: 22) On the other, it is crucial that the family leave benefit is well-paid since it then forms a greater incentive for men to take them. As argued by Morgan, when offered on a flat-rate basis, women are more likely to take the leave, reinforcing the gendered division of wage and care labour (2009: 321). However, if the benefit is income-related, as advocated by Morgan, this leads to class inequalities emerging, privileging higher income classes with greater benefits although already possessing more resources. Income-related benefits may not be effective incentives for fathers from lower income classes to take leaves, as the opportunity costs of forgone employment may exceed the income provided through the benefit. Therefore, leave-quotas are considered more universally defamilising in comparison to income-related benefits, while the compensations should be well paid (around the average market wage), but on a flat-rate basis. Although Saraceno and Keck (2010) generally attribute leave policies to be informed by notions of supported familialism15 this thesis considers certain leave arrangements defamilising, following a similar but extended line of argument as Lohmann and Zagel’s (2015) conceptualisation. First, care has entered the public realm of policy-making, when leaves are offered via the employer. Secondly, paid leaves recognise care as a form of labour when it entails entitlement to a generous compensation. Thirdly, this further implies care labour to also be upgraded in value when generously compensated. Fourthly, it is argued that in the long-run, leave policies have the potential to reduce women’s care responsibilities and financial dependencies through securing labour market attachment by having a job to return to and subsequently supporting women’s economic security (Lohmann

15 They argue that parental leave policies increase specific family members’ (i.e. women’s) care responsibilities (Saraceno & Keck, 2010: 679-678).
& Zagel, 2015: 6). However, this applies only to leaves of short/moderate duration, as discussed above. Finally, men can be incentivised to take parental leave too through well-paid leaves and leave-quotas, which support the division of care labour being distributed more equally (Saraceno & Keck, 2010: 677) The leave dimensions which will be analysed in regards to their defamilisation potential are therefore: *Duration of Maternity Leave, Maternity Benefit (Level of Compensation as a Share of Earned Income)* as well as the *Duration of Paternity Leave, Paternity Benefit (Level of Compensation as a Share of Earned Income)* and *Leave-Quotas Reserved for the Father*. In regards to parental leave, the *Duration of Net Paternity Leave*, the *Duration of Compensation* and the *Parental Benefit (Level of Compensation as a Share of Earned Income)* will be analysed, which captures the duration of paid parental leave weighted by the replacement level.

The last employment-related policy dimension considered here are *Family Leave Policies*, which grant employees time off work to tend to children and adult relatives in need. There are usually two types of family leaves available: short-term and long-term leaves. In both cases, level of compensation and duration are again central to the defamilising potential of each form of leave (Daly, 2002: 257). In regards to compensation, it is central that the family leave benefit is well paid to form a greater incentive for men to take them. Regarding the duration, short-term leaves are considered preferable over long-term leaves, since opportunity costs of forgone employment are higher the longer the absence. Additionally, long-term leaves are usually unpaid implying that care is not recognised as labour, deserving of compensation. The long duration and uncompensated nature of the leave makes it more likely for women to take the leaves as men’s opportunity costs are far greater relatively due to gender unequal workplace practices, as mentioned previously. Consequently, short-term leaves can have several advantages over long-term leaves: greater likelihood of compensation implying recognition of care as labour, greater maintenance of labour market attachment and therefore economic security and independence, lower opportunity costs of forgone employment and greater incentives for men to take the leave. Well-paid short-term leaves are thus considered to be defamilising while uncompensated long-term leaves are argued to have familising effects. Therefore, the relevant policy dimensions of analysis will be *Duration of Paid Family Leave (weeks)* and *Family Leave Benefits (Level of Compensation)*.
ii) Childcare Policy

In the following, childcare related policies will be analysed centring on the public provision of Services, such as childcare and (pre)-primary educational services, and Financial Support, including care allowances and tax deductions.

Focussing first on Services, it can be said that “high-quality, publicly subsidized early childhood education and care is a [...] component of policies to support” a gender-egalitarian division of earning and caring (Gornick & Meyers, 2009: 25). As discussed above, privatised (for-profit) care services tend to downgrade the value of care, exploit non-familial carers and have severe implications in regards to class and gender inequalities. Only publicly funded and universally accessible care services are considered defamilising across income classes. Of further interest and relevance for defamilisation is the intensity of the care and educational services. This can be captured by looking at the full-time (>30 hours) childcare usage, opening hours of pre-primary education as well as attendance of before- and after-school childcare. The earlier children have access to care and educational services and the longer children spend time in day care and school, the more time is available for families (i.e. women) to engage in the labour market and secure economic independence and security. In other words, the public provision of care and educational service reduce families’ care responsibilities, which in turn contribute to reducing financial dependencies within the family.

In sum, relevant aspects of publicly funded care and educational services for children are:

1. Individual Entitlement to Public Childcare Services for Children < 3 Years: whether children (0-2) are entitled to publicly funded childcare services
2. Childcare Usage: the share of children age 0-2 in childcare services
3. Full-time (≥ 30 hours) Childcare Usage: the share of children age 0-2 in childcare services for equal or more than 30 hours per week
4. Enrolment in (Pre-)Primary Institutions: the share of children age 3-5 in (pre-)primary childcare services
5. Opening Hours of Pre-Primary Educational Institutions (Hours per Weekday): the standard opening hours for institutions offering pre-primary education
6. Beginning of Compulsory Education (Age in Years)
7. School Hours: Minimum Teaching Time in Primary and Secondary Education (Hours per year)
8. Attendance of Before- or After-School Childcare (Share of Pupils)
Other relevant dimensions, which should be considered but are neglected here due to data availability, are for instance whether meals are provided in public schools and how many extracurricular activities can be followed after school. Furthermore, the exact opening hours in the morning and the closing hours in the afternoon should be considered in addition to the total opening hours per day, mentioned above. Further research will have to include and analyse the effects of these measures on defamilisation.

Lastly, it is of interest to see whether families receive Financial Support (such as care allowances and tax exemptions) from the government either in addition or in lieu of publicly funded childcare services. As discussed above, Saraceno & Keck (2008, 2010) consider financial support to be informed by supported familialism, since families receive compensation for care responsibilities being individualised and not partially assumed by the state. These policies tend to reinforce traditional gender roles, since women are incentivised to stay at home, and deepen class inequalities as lower income class families cannot (easily) outsource care responsibilities. In this instance, by offering care allowances and especially tax deductions, care is not necessarily regarded as labour since not compensated equally to wage labour. Rather, the financial support can again be seen to function as a form of partial compensation for the opportunity costs of foregone employment (Daly, 2002: 257). However, if care allowances are offered universally in addition to universal public services, the compensation for care may be considered a step in the direction of recognising care as a form of labour. However, the value of care is only slightly upgraded at best, as the allowance or tax deduction will likely not equal an average market wage. The dimensions of interest in this category are:

1. **Universal Entitlement to Public Child Allowance (Yes/No):** whether the child allowance is paid universally for all children of a certain age
2. **Child Allowance for One, Two And Three Child(ren) as a Share of Net Average Income**
3. **Tax Deductions for Families with Children (Yes/No)**

### iii) Eldercare Policy

To analyse eldercare related policies, again both Services (such as public residential and homecare services) and Financial Support (such as minimum pensions, cash-for-care benefits, minimum/maximum care allowances) are taken into consideration.

Schmid et al. (2011) show that social Services (institutional and homecare services) in general relieve daughters from intense informal caregiving thus reducing their care...
responsibilities (2011: 47) and increasing defamilisation. In order for this to occur, it should be considered whether dependents have Universal Access to Care Services. More specifically, it should be analysed whether access is granted as an individual right to the elderly based on care needs or whether access is dependent on the financial resources of the dependent or her/his family. In regards to defamilisation, financial dependencies and responsibilities are reduced when access is granted on an individual basis rather than via means-testing of the dependent’s and her/his family’s resources. Furthermore, when based on need rather than on the family’s income, the care responsibilities are collectivised. Through having publicly financed professional services available care is upgraded in value, as qualifications will be required entailing adequate compensation of care labour provided by the formal carers. As a second dimension the need coverage should be taken into consideration, since the two forms of care services – institutional and homecare – vary in their care intensity and thus have different effects on defamilisation. Ulmanen and Szebehely’s study on the Swedish eldercare system, showed that the intensity of care is higher when institutional care is provided as opposed to homecare services (2015: 83). Furthermore, they showed that reducing access to care-intensive institutional care leads to “all available sources of care hav[ing] to be used to compensate for it: family, care, homecare and privately purchased services.” (2015: 89-90) This implies, on the one hand, increased gender inequalities, as (specific) family members’ informal care responsibilities increase. On the other hand, class inequalities are increased: lower income classes will have little alternatives left than to turn to the family for informal care, while higher income classes are more likely to gain access to private services to compensate for the reduced intensity of care, in turn relieving familial care dependencies (Ulmanen & Szebehely, 2015: 82). However, in the latter case, financial dependencies may increase nonetheless when dependents’ financial situation requires support from children or relatives to purchase the services privately. Hence, generally it is argued that institutional care holds greater potentials of defamilisation than homecare services, as it offers a higher intensity of care. Therefore, the Share of Dependent 65+ Population in Institutional Care will be taken into consideration as will the Share of Dependent 65+ Population in Homecare. Capturing the intensity of homecare services (in hours) would provide information on the defamilising effects of the country specific homecare system. Unfortunately, comparative data measuring this is not available and can therefore not be taken into consideration. While institutional care is likely to be more intensive than homecare services, the availability of the latter is still preferable when institutional care provision is low or non-existent. When institutional care or homecare services only cover a limited share of the dependent elderly
population, family care or private care gains importance, increasing gender and class inequalities. Hence, the Share of Dependent 65+ Population Without Formal Services is also taken into account.

In regards to Financial Support, care allowances and minimum pensions are brought into focus. Several welfare states offer care allowances, however, under different conditions (Saraceno & Keck, 2010: 687) and with different intended functions. Generally, financial support, such as care allowances, are regarded as a form of supported familialism or optional familialism – they are either intended to substitute services (supported familialism) or pay for services of one’s own choice, being formal or informal (optional familialism) (Saraceno & Keck, 2010: 687). To analyse the specific effect of care allowances, different aspects must be considered. The Availability of Cash-For-Care Payments captures whether public cash benefits are available in general – either to compensate an informal carer, to substitute care, or to offer the dependent money to pay for formal/informal care. To then look at the intended function of the benefit more specifically requires examining who the intended beneficiary of the care allowance is. The question is whether the informal caregiver is being compensated or whether the allowance is directed towards the care receiver to purchase services. When directed at the caregiver, the implicit underlying notion is that eldercare is an individual responsibility. Hence, the care responsibilities within the family are increased, therefore shifting them predominantly to daughters (Schmid et al. 2011: 48). But even when the benefit is directed at the care-receiver, class inequalities emerge likely reinforcing gender inequalities. As noted by Simonazzi & Picchi (2013: 127): “the evidence is that countries relying on cash allowances tend to favour high-income groups, which are more likely to benefit from formal homecare services, whereas low-income groups may tend to use care allowances to pay informal carers instead.” Again, the compensation will then be predominantly directed at female relatives assuming the care responsibility – if not providing the care without actually receiving the compensation. Hence, independent of the beneficiary of the allowance, care is not considered a form of labour nor upgraded in value as it is not seen as a payment for care but rather as a compensation for “the financial rewards which people are forfeiting by caring” (Daly, 2002: 257). Therefore, care allowances either way undermine the potential of universal defamilisation.

Lastly, in order to secure a sufficient income when exiting the labour market due to age welfare states offer public pensions for the retirement period. However, eligibility to the public pensions depends on individuals’ employability, intensity and continuity of employment over their active life course, as well as access to jobs of good quality (European
Commission, 2015: 3). But, as discussed above, labour market opportunities are not equally distributed across society (European Commission, 2015: 3), hence certain individuals’ employment history may not entitle them to the basic public pension benefits. This renders a share of pensioners financially dependent on the family or the state, as they will likely fall below the at-risk of poverty (AROP) threshold. In this case, certain welfare states offer minimum income provisions (usually regulated through social assistance programmes) to bring these individuals (closer to or) above the AROP threshold to secure some form of financial autonomy, albeit limited. As noted by the European Commission, these minimum income provisions are especially relevant to women as they function to “mitigate[e] the insufficient pension rights that women have been able to accumulate over their working lives.” (2015: 132) Depending on the level of generosity of the minimum income, it may reduce financial dependencies within the family (Bettio & Plantenga, 2004: 97; Saraceno & Keck, 2010: 688). When offered on a generous level (i.e. bringing these individuals significantly above the AROP threshold) the minimum income provision can be considered defamilising, as they “define a public responsibility for the financial autonomy of the elderly” (Saraceno & Keck, 2011: 10). Only minimum income provisions will be considered in relation to financial autonomy in old age, as basic public, voluntary as well as mandatory private pension plans depend on previous labour market participation and earnings, therefore resembling a dependent rather than independent variable.

In some cases, the social assistance programmes offer different levels of minimum income benefits to couples versus single individuals. Across countries, the patterns vary – in some cases couples receive substantially higher minimum income benefits (as a share of the AROP threshold) than singles and vice versa (European Commission, 2015; 137). Granting couples higher benefits than singles unjustifiably sanctions single individuals. Ideally, the minimum income would be granted universally and generously (i.e. significantly above the AROP threshold), independent of relationship status. Therefore, the Minimum Income Provision for Single Elderly (Share of the AROP Threshold) will be analysed for different countries and compared to the Minimum Income Provision for Elderly Couples (Share of AROP Threshold).

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16 The at-risk-of-poverty (AROP) threshold is based on 2013 EU-Statistics on Income and Living Conditions (SILC) data, which refers to the income year 2012 (EU, 2015: 136).
17 It is not clear if such policies only apply to heterosexual couples or include same-sex couples. Further research should analyse this for different countries, to see the degree of heteronormativity enforced upon society.
2.2 Propositions

This chapter has outlined the theoretical framework explaining different aspects of intergenerational care and how they bare on gender equality. The argument has been made, that social and labour market policy shape childcare and eldercare responsibilities, which influence gender relations through reproducing or easing the unequal gender division of wage and non-wage care labour (Daly, 2000: 487, 492). Following the outlined theoretical arguments, an overarching principle on the abstract level can be brought into light:

\[
\text{high levels of gender equality are achieved when}\\
\begin{align*}
1) & \quad \text{care and financial responsibilities as well as dependencies within the} \\
& \quad \text{family are reduced} \\
2) & \quad \text{when intergenerational care responsibilities are considered a public} \\
& \quad \text{responsibility and hence are collectivised through universally accessible} \\
& \quad \text{service provisions} \\
3) & \quad \text{non-wage care is recognised as a form of labour and compensated as} \\
& \quad \text{such}
\end{align*}
\]

To empirically test the overarching premises, sub-principles (propositions) are formulated relating to the concrete dimensions of intergenerational policies discussed in the previous section. These specific policy inputs (independent variables) will be analysed in Chapter 4 for selected countries. The propositions will then be tested in Chapter 5 after the in-depth analysis of country’s specific policy dimensions is conducted. Based on the policy inputs and their defamilisation potential discussed in this chapter, the propositions are made that gender equality will be higher:

**Employment related policies:**

\begin{align*}
a) & \quad \text{the lower the hours constituting the standard (full-time) working week} \\
b) & \quad \text{when maternal leave is well-paid and of moderate/short duration} \\
c) & \quad \text{when men are incentivised to take paternity leaves (through offering high income} \\
& \quad \text{replacement rates and/or offering leave-quotas reserved for fathers)} \\
d) & \quad \text{when parental leave is well-paid and of moderate/short duration} \\
e) & \quad \text{when short-term family leaves are available, which are of moderate duration and well-paid}
\end{align*}
Childcare policies:

f) when universal entitlement to publicly funded childcare services is granted

g) when the share of children using childcare services and enrolled in (pre-)primary institutions is high

h) when shares of children in full-time childcare are high

i) when the share of children using childcare services and enrolled in (pre-)primary education are longer

j) when compulsory education begins at an early age

k) when the share of pupils attending before- or after-school childcare is high

l) when the opening hours per week day of pre-primary education are longer

m) when the level of child allowances, when tax deductions are offered to families with children and when both child allowances and tax deductions are available in addition to care services

Eldercare policies:

n) when individual entitlement to public elderly care services and care payments are based on need and not means-testing (of family members)

o) when a greater share of elderly dependents are in institutional care rather than receiving homecare services

p) the lower the share of elderly dependents without formal care services

q) when the welfare state offers public care services rather than care allowances

r) when the amount of minimum income provision for older people is above the at-risk-of-poverty threshold

s) when singles/couples receive the same amount of minimum income provision
3. Operationalisation: A Gender Equality Index

In this chapter, a gender equality index is developed and calculated for different European countries. Based on the country’s different scoring, a case-selection is made in order for the formulated propositions to be tested in chapter four.

The relevance of having an accurate index to measure gender gaps in countries lies in monitoring “strong or weak aspects of a national situation and facilitate[ing] inter-country comparisons” of gender (in)equality (Plantenga et al., 2009: 19). As stated by the European Institute for Gender Equality (EIGE), “[p]olicy improvement cannot bear fruit without systematic and consistent measurement of gender gaps” (EIGE, 2013:2). Furthermore, it allows for gender (un)equal trends as well as (inter-)country changes to be traced over time (Plantenga et al., 2009: 19). Therefore, operationalising gender equality is considered a fundamental aspect of effective policy-making in itself and, moreover, to monitor and evaluate policy outcomes (EIGE, 2015: 7; Plantenga et al., 2009: 19). Additionally, gender equality indices support “increased gender awareness and induces countries to take specific actions.” (Plantenga et al., 2009: 19)

While the long-term, cross-country monitoring of gender equality is most effective when one commonly approved gender equality index is applied, a new approach to measuring gender equality is presented in the following. It is argued that the established indices (presented in Table 2 on page 35) are falsely conceptualising gender equality by underemphasising fundamental aspects of gendered employment and care patterns. The following index is not exhaustive in the dimensions captured, as it mainly focuses on inequalities relating to the reconciliation of wage and care labour. Thus, important dimensions of gender equality are not taken into considerations, such as health (i.e. universal access to gynaecologists, pre/peri/post-natal health services, etc.) and violence (prevalence of domestic violence, sexual abuse, etc.). In addition, the developed gender equality index does not appreciate intersecting inequalities leading to different exposure to inequality within a given gender. Further research should carefully explore how individuals in different situations (i.e. different class backgrounds, race-ethnic affiliations, age groups, sexual orientations, marital status, etc.) are affected by labour market practices and social policy, in order to arrive at a more comprehensive understanding of the complex nature of (gender) inequality. Nonetheless, the index presented contributes to a comprehensive understanding of gender equality: non-wage domestic and intergenerational care responsibilities are defined as labour and given emphasis by placing it along side wage labour related outcomes. By doing so, the interrelatedness of the two forms of labour is addressed: when assuming the role of the
predominant caregiver, engagement in wage labour is compromised leading to an array of negative consequences including economic dependence and increased risk of poverty. Furthermore, by emphasising care directed towards elderly dependents and the emerging consequences in terms of gender equality, the proposed index makes a novel contribution to the understanding of gender equality as a multifaceted concept.

Of the existing gender equality indices, the GEI (EIGE, 2013, 2015) and the EUGEI (Plantenga et al., 2009) are considered more comprehensive in comparison to the others presented, since they are the only two which conceptually include and measure the unequal distribution of care responsibilities (as seen in Table 2). Nonetheless they are critically flawed in their conceptualisation of care labour. First, both indices separate non-wage care from wage labour by conceptualising and measuring them within separate dimensions. The EUGEI (Plantenga et al., 2009: 24; 2013: 43) uses the dimension equal sharing of unpaid time comprising two sub-dimensions: caring time (i.e. gender gap in caring time for children) and leisure time (i.e. gender gap in leisure time). The GEI (EIGE, 2013: 25ff; 2015: 18ff) also conceptualises time as a sub-dimension, which includes the two variables care activities (i.e. childcare activities; domestic activities) and social activities (i.e. sport, culture and leisure activities; volunteering and charitable activities). It must be noted that Plantenga et al. do recognise the interrelatedness of wage labour and unpaid care labour when stating that “an equal distribution of unpaid time must be seen as a major precondition for an equal distribution of paid work” (2009: 24). The same can be said for the GEI, which acknowledges that “[t]he commitment of time to care constrains one’s possibilities to participate in the labour market and to gain equal economic independence” (EIGE, 2013: 26). Nevertheless, it is misleading to conceptualise care responsibilities along side the sub-dimension of leisure rather than wage work, as it is not a problem of the private organisation of time between the two sexes. Labelling care work as “care time” and “care activities” undermines explicitly acknowledging it as labour, especially when put alongside activities of leisure\(^\text{18}\), including socialising, reading, watching TV or going to the theatre (Plantenga et al. 2009: 23). In addition, conceptually separating wage labour from care labour in a gender equality index tends to reify the ideological distinction of the public and the private sphere. Rather, it must be addressed in its true nature – a public and structural problem, which should hence be

\(^{18}\) Of course caring for children and elderly in many cases is very fulfilling, similar to activities of leisure. But since it is not only enjoyable and is often perceived as extremely demanding, categorising it alongside leisure does not capture its dual-sided nature and foremost, undermines it being recognized as actual labour. Furthermore, it undermines being recognized as a public concern, which has implications for policy-making, as discussed subsequently.

32
treated as a collective responsibility. This would imply governments providing adequate support in multiple forms to ease the care burden resting predominantly on women. If not rightfully recognized and treated as a collective and public responsibility we are again left with ineffective policies being developed, which do not acknowledge that when women predominantly assume care responsibilities, their facilitation into the labour market is hindered. As a result, women remain rendered economically dependent and at greater risk of poverty or social exclusion.

Second, a further critical flaw lies in the indices’ foci on childcare without equally emphasising elderly care. Regarding the GEI (EIGE, 2013, 2015), although the importance of elderly care is mentioned when discussing the conceptual framework of gender equality in the original 2013 report (2013: 26), the actual index (in original and updated form from 2015) only measures “workers caring for and educating their children or grandchildren, every day for one hour or more” (2013: 81; 2015: 47). The EUGEI (Plantenga et al. 2009) notes that measuring unpaid care “activities” should include women and men’s time spent on child care as well as elderly care and other dependents (2009: 24). However, they argue that “[s]ince care for children is often the most time-intensive, the sub-dimension refers to this type of care.” (2009: 24) While this may be true, it still does not serve as a justification to dismiss the importance of including elderly care in a gender equality index. First, the approach by Plantenga et al. (2009) disregards the fact that informal care towards the elderly exhibits a gendered nature in that women provide more care than men (Schmid et al., 2011; Colombo et al., 2011). Therefore, informal care is equally important to capture when looking at gender (in)equality. Secondly, by implication, the EUGEI index by Plantenga et al. (2009) neglects the share of women without children predominantly taking on eldercare responsibilities and who are therefore also affected by gender inequality. Third, as shown by Szebehely et al. (2014) informal care towards elderly dependents can have a great impact on women’s employment patterns. When studying informal eldercare in Sweden, they demonstrate that 17% of female carers (10% of male) reported to have changed their employment situation (i.e. reduced their working hours, quit their jobs or have chosen early retirement), while 20% of women (13% of men) reported their income to have been reduced due to informal care responsibilities (Szebehely, 2015; Szebehely et al., 2014: 24). The study conducted by

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19 Informal is provided by relatives, partners or friends on a non-wage basis, whereas formal care is provided by paid, professional care-givers.  
20 As discussed above, any instance of income being reduced can have detrimental effects on women’s economic independence and security (by increasing the risk of poverty or social exclusion).  
21 Presentation from Martha Szebehely at the ‘A new perspective on care practices’ conference in
Szebehely et al. (2014) underlines the importance of measuring elderly care and its effects on employment patterns, i.e. the reconciliation of wage and non-wage care labour. In conjunction with childcare, eldercare is a collective responsibility, which must be addressed adequately and comprehensively in policy-making. Hence, the proposed index introduced in the following section includes wage work and domestic and intergenerational care work in the same key-dimension. By doing so, it aims at raising awareness for policy makers to consider both forms of work as two sides of the same coin – interrelated and inseparable when striving to ease the reconciliation of wage and care labour to increase gender equality.

3.1. Measurement Framework

The presented index is made up by three key-dimensions: *Equal Share in Wage and Non-Wage Care Labour, Equal Share in Economic Security* and *Equal Share in Representation*. The dimensions were chosen qualitatively based on their perceived importance for moving beyond a gendered world, to arrive at a point of equal distribution of wage and care work (Fraser, 1994: 611). The chosen dimensions and sub-dimensions are highly interrelated as increased inequality in one area can lead to inequality in another. For example, a low intensity of labour market participation (e.g. part-time employment\(^22\)) can be traced back to women’s difficulties in managing the unequal distribution of unpaid work. Part-time or temporary employment will ultimately reduce women’s earnings, resulting in lower social contributions into social security programmes (such as unemployment benefits and pensions), which subsequently threaten women’s economic security. Having a limited access to social benefits, due to lower contributions through wages, renders women more dependent on the labour market (or partner/relative) to secure a decent standard of living\(^23\) for themselves (and their family) and threatens women’s economic security and independence. Ultimately, this puts women at greater risk of poverty temporarily and in the long run.\(^24\)

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\(^{22}\) Defined as employed and self-employed individuals working less than 30 hours per week in their main job (OECD, 2016b: 41)

\(^{23}\) This implies a re-commodification, i.e. a decrease individuals bargaining power on the labour market.

\(^{24}\) The latter results from lower pensions available than if full contributions had been made via full-time job over a life course.
<table>
<thead>
<tr>
<th>Index</th>
<th>Dimensions</th>
</tr>
</thead>
</table>
| **Gender Equality Index (GEI)** European Institute for Gender Equality | • Work (participation, segregation, quality of work)  
• Money (financial resources, economic situation)  
• Knowledge (educational attainment, segregation, lifelong learning)  
• Time ((child)care activities, leisure activities)  
• Power (political, social, economical)  
• Health (status, access)  
• **Intersecting Inequalities (discrimination and other social grounds)**  
• **Violence (direct; violence against women)** |
| (EIGE, 2013, 2015)                                                    |                                                                                                                                                                                                          |
| **European Union Gender Equality Index (EUGEI)** Plantenga et al. (2009, | Equal Sharing of:  
• Paid work (labour force participation, unemployment, income)  
• Decision-making power (political, socio-economic)  
• Knowledge (education and training, educational attainment)  
• Unpaid time (caring time (children), leisure) |
| 2013)                                                                |                                                                                                                                                                                                          |
| **European Gender Equality Index** Bericat (2011)                     | • Education (attainment, lifelong learning and internet, segregation)  
• Work (participation, contracts, occupational and pay segregation)  
• Power (political, managerial)                                           |
| **Gender Development Index** United Nations Development Programme (UNDP, | • Educational attainment  
• Longevity  
• Income                                                                 |
| 2016)                                                                |                                                                                                                                                                                                          |
| **Gender Inequality Index** UNDP (2016)                              | • Labour Market (labour force participation)  
• Empowerment (educational and political)  
• Reproductive Health                                                      |
| **Inequality-adjusted Human Development Index** UNDP (2016)           | • Health (inequality-adjusted life expectancy index)  
• Education (inequality-adjusted education index)  
• Income (inequality-adjusted income index: Quintile income ratio; income Gini) |
| **Gender Equity Index** Social Watch (2012)                          | • Education  
• Economic participation/activity  
• Women’s empowerment (political, technical, economic)                      |
| **Global Gender Gap Index** World Economic Forum (WEF, 2016)         | • Economic participation and opportunity  
• Educational attainment  
• Health and survival  
• Political empowerment                                                    |
| **Relative Status of Women** Dijkstra and Hanmer (2000)              | • Ratio of female and male index for education (attainment)  
• Ratio of female and male index for life expectancy (longevity)  
• Relative female and male returns to labour                                |

Table 2. Overview of Existing Gender Equality Indices.  
Note: The dimensions **Intersecting Inequalities** and **Violence** of the EIGE Gender Equality Index (GEI) are conceptualised but not actually measured in the index.
The sub-dimensions and variables (see Table 3 on page 39) will be critically discussed in the following, while explaining the underlying calculations leading to the countries’ scores. In a first step, the data for the variables were collected from various databases (OECD, Eurostat, UN, the World Bank), in order to calculate ratios representing the differences between female and male outcomes (i.e. gender gaps) in the respective area of interest. The variables used for the index are all exclusively dependent variables of gender (in)equality. Keeping the dependent and independent variables in separate frameworks is pivotal: if “treated at the same level […] there is a real danger of double counting and of overestimating differences.” (Plantenga et al. 2009: 23). Therefore, the independent variables potentially accountable\textsuperscript{25} for difference in country-specific gender (in)equality outcomes have been discussed previously and will be analysed for specific cases in the following chapter.

The dependent variables, discussed in this chapter, are aggregated to form an indicator at the level of the respective sub-dimension, by using the geometric mean. The geometric mean is used (as opposed to the arithmetic mean) since it is stricter in the sense that it undermines potential effects of perfect substitutability or compensation\textsuperscript{26} (EIGE, 2013: 49, EIGE, 2015: 20, Plantenga & Remery, 2013: 45). In other words, applying the geometric mean “implies that a low score on one dimension [or variable] is no longer linearly compensated by a high score in another dimension [or variable].” (Plantenga & Remery, 2013: 45) Furthermore, the geometric mean adjusts for correlations between variables and sub-dimensions of gender inequality (Plantenga & Remery, 2013: 45). In a second step, the sub-dimensions are aggregated again using the geometric mean, to receive a score for each key-dimension. Equal weighting\textsuperscript{27} is applied to the variables and the sub-dimensions when aggregated, since they are reciprocal and considered equally important for gender equality.

The key-dimensions themselves will not be lumped together into one single score, as commonly found. This is grounded in the fact that most countries exhibit great variation in the scoring across the three dimensions. Therefore, averaging the three dimensions to form one

\textsuperscript{25} Causal relations cannot be inferred, since the problem of confounders cannot be solved. The connection between the dependent and independent variables will be discussed in the following chapter, when looking at the country specific intergenerational care policies.

\textsuperscript{26} For instance, where the arithmetic mean calculates a score 75 when averaging 50 and 100, the geometric mean calculates a lower mean of 71. The third Pythagorean mean, the harmonic mean, is even less compensatory: averaging the same numbers as above, it results in a mean of 67 (Example taken from EIGE, 2013:49). The geometric mean can therefore be seen as “the mean of means”; situated between the value-maximising arithmetic and the value-minimizing harmonic mean.

\textsuperscript{27} To calculate the GEI, the EIGE for instance applies weighting at the key-dimension level in order to calculate a single gender equality score for each country. At the variable and sub-dimension level however, equal weights are computed (EIGE, 2015: 20).
Each country receives a score for each indicator and (sub-)dimension, where 0 indicates perfect gender inequality and 1 perfect gender equality. Since the gender gaps are not standardised\(^{28}\) values larger than 1 can occur, implying a *positive* gender gap (i.e. women’s advantage over men) as opposed to a *negative* gender gap (i.e. women’s disadvantage). It is argued, that it is important to trace changes in both directions (i.e. positive and negative gender equality); this allows for more targeted and resource-efficient intervention in areas needing improvement. Once gender equality in one dimension is achieved and effectively sustained, efforts and resources can then be re-directed to another unequal area. In dimensions with scores greater than 1, this will be understood as an area where progress against gender inequality overall is being made. Under conditions of general inequality (i.e. across dimensions), female advantage in one area will be understood as addressing this general inequality rather than representing disadvantage or inequality of men. Nonetheless, the sub-dimensions have to be analysed before inferences can be made: if a dimension scores 1 but is comprised by sub-dimensions ranging from 0.5 – 1.5, this is considered less gender equal then when the scoring in the sub-dimensions are all ranging close to 1. Generally, the aim of policy-making should be to achieve values of 1 for each country in each dimension allowing for both sexes to have equal opportunities and positions in society.

Additionally, it must be noted that when measuring and referring to gender gaps in the following, the concepts of gender equality is understood relationally and not as absolute. The

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\(^{28}\) Plantenga et al. standardise the gender gaps in their study, but, as they note, this undermines the actual inequality within the dimensions to be distinguishable as positive or negative gender gaps (2009: 32).
different gender gaps developed refer to the respective figures for women in relation to men and are all translated into percentages. Also, the ratios do not allow for conclusions to be made in regards to a country’s situation in certain dimensions. For instance, when looking at variable ‘at risk of poverty or social exclusion’, if a country scores around 1 this means that both men an women are equally at risk – it cannot be inferred that the respective country has high or low rates of risk for women or men. The scores allow for relative interpretation of gender equality only.

Finally, while trying to apply the index to as many European countries as possible, data availability limited the scope of countries included. Although initially aiming to incorporate new EU members, which are often missing in comparative analyses (Saraceno & Keck, 2008: 8), the majority had to be neglected due to missing data. In total, data covering the three different key-dimensions were available for 20 countries: Austria, Belgium, Denmark, Estonia, Finland, France, Germany, Hungary, Ireland, Italy, Latvia, Lithuania, Netherlands, Norway, Poland, Slovenia, Spain, Sweden, Switzerland the United Kingdom.
<table>
<thead>
<tr>
<th>Dimensions</th>
<th>Sub-Dimensions</th>
<th>Variables</th>
<th>Age Group</th>
<th>Data Year</th>
<th>Data Source and Survey</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Continuity of Employment: Gender Gap in Employment over Life Course</td>
<td>Gender Wage Gap</td>
<td>15-64</td>
<td>2015</td>
<td>Ranging from 2001 (e.g., Slovenia to 2013 (e.g., Germany) with exception of Ireland (2014); Spain (Provisional) and UK (Estimated)</td>
</tr>
<tr>
<td></td>
<td>Gender Wage Gap in Risk of Poverty or Social Exclusion</td>
<td>Gender Wage Gap in Permanent Contracts</td>
<td>15-64</td>
<td>2015</td>
<td>&gt;16.64 &lt;</td>
</tr>
<tr>
<td></td>
<td>Representation in Education</td>
<td>Gender Gap in Attainment of Upper (Post-) Secondary Non-Tertiary Education</td>
<td>15-64</td>
<td>2016</td>
<td>Eurostat (2017a) – Population by educational attainment level, sex and age (%) – main indicators: E03-4, Upper secondary and post-secondary, non-tertiary education [edat_lfse_03]</td>
</tr>
<tr>
<td></td>
<td>Representation in Research, Science and Engineering</td>
<td>Gender Gap among Scientists and Engineers</td>
<td>15-64</td>
<td>2015</td>
<td>Eurostat (2017a) – Population by educational attainment level, sex and age (%) – main indicators: E03-4, Upper secondary and post-secondary, non-tertiary education [edat_lfse_03]</td>
</tr>
</tbody>
</table>

Table 3. Overview of (Sub-)Dimensions, Variables, Age Groups, Data Year and Data Sources of developed Gender Equality index.
3.2 Equal Share in Wage and Care Labour

The first dimension *Equal Share In Wage And Care Labour* represents gender equality in paid and unpaid labour. The dimension comprises two sub-dimensions: i) *The Wage Labour Force* (measured by *Gender Gap in Intensity and Continuity of Employment*) and ii) *The Informal Care Labour Force* (measured by the variable *Gender Gap in Non-Wage Care Labour*). The geometric mean of the two sub-dimensions was calculated, resulting in the country’s final scores under *Equal Share in Wage and Care Labour*. Table 4 exhibits country’s individual scores.

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Equal Share in Wage and Care Labour</th>
<th></th>
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</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Wage Labour Force</td>
<td>Informal Care Labour Force</td>
<td>Total Gender Gap in Wage and Care Labour</td>
<td></td>
<td></td>
</tr>
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Table 4. Country scores in Equal Share in Wage and Non-Wage Care Labour.

Source: Own Calculations based on data collected from OECD (2017c), Eurostat (2017a) and UNSD (2017a).
The Wage Labour Force: Gender Gap in Intensity and Continuity of Employment

Following Fraser (1994), facilitating women’s entrance in the labour force is a central precondition “to enable women to support themselves and their families through their own wage earning.” (1994: 601) This precondition leads Plantenga et al. (2009) to include labour force participation rates and deeming it “indispensable dimension in any gender equality index.” (Plantenga et al., 2009: 23) Labour force participation rates capture all individuals economically active in the labour market, meaning the employed, self-employed as well as the unemployed population, i.e. actively seeking employment (OECD, 2017a). But since female unemployment in the first instance often tends to result in labour market inactivity, the unemployment rate included in the labour force participation rate is inflated through including women who will (sooner or later) stop actively looking for work and drop out of the labour market (Daly, 2000: 479; Rubery et al., 1999: 115). To account for this inflation, this thesis draws upon employment rates rather than labour force participation rates. The employment rate is calculated by putting the female employed population in relation to the total female population (15-64). In other words, the employment rate excludes the share of unemployed, therefore offering a more accurate measure of female employment patterns (Daly, 2000: 479).

Furthermore, drawing on related studies on women’s employment patterns, Daly (2000) points out that “participation rates per se are relatively poor guides to the extent of women's involvement in and the nature of their relationship to the labour market” (2000: 474). Rather, Daly stresses the importance of distinguishing between the intensity of employment (i.e. part-time versus full-time employment patterns) as well as the “duration or continuity in women’s work careers.” (2000: 475, italics added) The importance is demonstrated by pointing to the Dutch case (2000: 475), which remains exemplary today. Regarding the intensity, while the female employment rate in the Netherlands was one of the highest across Europe in 2015 (74.7%), 72.7% of these women were employed part-time (OECD, 2016b: 220, 227). Working part-time is argued to result “[w]hen women are responsible for caregiving, and parents cannot count on daycare services or extended family” (Clement et al. 2009), since this compromises their employment opportunities. When looking at the continuity of women’s employment, women in the Netherlands cut back on their average working hours between the ages of 25 and 35 – unsurprisingly, this being the period in which women commonly have children. More remarkable, however, is the fact that women “barely increase them [average working hours] again thereafter.” (CBS, 2016: 4) Hence, employment rates must be adjusted for the intensity as well as the continuity of employment over life courses. Especially, since a reduced intensity and breaks in continuity will have effects on earnings levels and therefore
economic dependence and security.

To adjust for the *Intensity of Employment*, data on full-time equivalent (FTE) employment rates of men and women are gathered from the OECD survey ‘Employment: Full-time equivalent employment rate by sex’ for the year 2015. The FTE employment rate captures women and men’s employment rates, which are multiplied by the average usual working hours per week per employed person (including self-employed) and are then divided by 40 hours, which is considered the average full-time working week (OECD, 2017c). This allows the FTE employment rate to control for hours worked (i.e. full-time versus part-time employment) and therefore offers a more representative indicator of the gendered nature of employment patterns. The indicator is labelled *Intensity of Employment: Gender Gap in FTE Employment Rates*. The OECD survey does not allow different age groups to be analysed and compared, offering a sole number comprising the age group 15-64. Databases should offer disaggregated data for different age groups (especially 25-34, 35-39, 40-44, 45-54) in order to see women’s (relative to men’s) employment patterns in different age groups, more specifically for each country.  

To calculate the *Continuity of Employment* over the life course, data from the Eurostat survey ‘Employment and activity by sex and age – annual data’ was used for the year 2015. Here, the female and male employment rates (as a percentage of total population) were only available for three broad age group categories – a higher number of narrower age categories would be preferable as it would allow for more accurate analysis of changes in employment patterns. In a first step, the geometric mean was calculated across the three age groups for women and men individually. In a second step, the geometric means across the life course of women and men (15-64) were put into relation (women: men) to receive the gender gap for each country. This indicator is labelled *Continuity of Employment: Gender Gap in Employment over Life Course*. To take the gaps in *Intensity* and *Continuity* together into one, the geometric mean of the two variables was formed for each country and expressed as *Gender Gap in Intensity and Continuity of Employment*.

**ii) The Informal Care Labour Force: Gender Gap in Non-Wage Care Labour**

As stated above, it is crucial to analyse gender inequalities regarding unpaid, informal care labour, as it is often the root of women’s disadvantaged socioeconomic position in society. To

29 For a detailed description of women’s employment patterns over their life course in 1990, 2000 and 2005 the United Kingdom, France, Germany and the Netherlands see the work of Chkalova (2007).

30 Age groups 15-24, 25-54 and 55-65.
analyse the Gender Gap in Non-Wage Care Labour for each country, data from the UN survey ‘SDG 5.4.1 Proportion of time spent on unpaid domestic and care work by sex, age and location’ was drawn upon. This comparative time-use survey captures women and men’s average time spent on unpaid labour for own consumption, expressed as an average per day (UNSD, April/May 2017). It includes domestic responsibilities (i.e. food preparation, dishwashing, cleaning, laundry, ironing, gardening, shopping, caring for pets, installation, servicing and repair of personal and household goods) as well as care responsibilities (childcare, care of the sick, elderly or disabled household members). There are, however, limitations to this database, which affects comparability across countries (UNSD, April/May 2017). First, it is problematic that the survey only looks at care provided to household members. It therefore does not capture the true amount of care provided to elderly/sick/disabled dependents, who do not live within the same household. Also, the data does not control for household patterns and culturally determined family traditions. Therefore, the data on provided care time is likely to be overestimated for countries with traditionally greater numbers of household members living together, i.e. countries where multiple generations tend to live together due to culturally determined family structures. Second, the survey lumps these responsibilities together and does not offer disaggregated data on the time allocated to domestic duties, child care and elderly care. Disaggregated data is needed to understand a countries’ specific case, in order to offer priorities to guide policy-making and develop appropriate policies. Third, varying age groups are taken into analysis, undermining comparability between countries. Fourth, as indicated by the UNSD, the time-use activity classifications may differ from the guidelines recommended by the UNSD. Finally, the database offers data on men and women’s time-use, which is collected through nationally conducted time-use surveys (of which some are integrated in multi-purpose household surveys). Respondents either fill out a stylized questionnaire or a 24-hour dairy. The time dedicated to unpaid domestic and care is calculated by dividing the average number of hours spent on unpaid domestic and care each day by 24 hours (UNSD, April/May 2017).

The data is expressed as an average per day calculated by averaging the time spent on domestic and care responsibilities over the course of a week (7 days) (UNSD, April/May 2017). See Table 1 in Annex for raw data.

The UNSD recommends countries to conduct time-use surveys according to guidelines based on International Classification of Activities for Time Use Statistics (ICATUS). In terms of unpaid work, it is recommended to distinctly measure ‘Providing unpaid domestic services for own final use’ and ‘Providing unpaid caregiving services to household members’, the latter including ‘child care’ and ‘adult care’ (See UNSD, 2017b).
years of data collection unfortunately differ between countries,\textsuperscript{35} which further undermines comparability.

Nonetheless, the UN survey seems to offer the most fitting data for this analysis, since it covers 28 European countries, for recent years 2000 to 2015 and, most importantly, captures time spent on elderly dependents along side time spent on child care. In comparison, other databases, for instance the Harmonized European Time Use Survey (HETUS) or the Multinational Time Use Study (MTUS) offer less recent data and cover a limited range of countries. The HETUS provides data on 15 European countries and the surveys vary between 1998 and 2006. It captures the time spend on domestic duties and care towards household members including ‘children’ (HETUS, n.d.). The focus of the main activities lies on childcare\textsuperscript{36} and it does not capture informal care towards elderly in a distinct category. The MTUS’s 'Harmonized Core Files’ covers 12 countries and the years of data collection range from 1997 to 2005 (Gershuny, J. & Fisher, K., 2016: 8ff). The MTUS’ harmonised activity codes also prioritise domestic labour (6 variables measured\textsuperscript{37}) and childcare (measuring 4 variables\textsuperscript{38}) while only one variable focuses on time dedicated to ‘adult care’ (Gershuny, J. & Fisher, K., 2016: 42).

There is a general problem with comparative time-use databases in that comprehensive databases remain underdeveloped. Time-use databases must be expanded measuring gender differences in allocated time to domestic and intergenerational care responsibilities (i.e. including separate time measurements relating to domestic tasks, the care of children and care towards elderly dependents within/outside the household) for recent years (post-2005) and for a large number of countries measuring the same age groups. More resources must be allocated to developing these comparative time-use databases, which should conduct time use surveys on a regular basis (in order to have recent data as well as data over a period of time). This lack of data availability underlines how the importance of how informal care, especially eldercare,

\textsuperscript{35} 2001 (Slovenia), 2003 (Lithuania, Latvia), 2005 (Belgium, Ireland, UK), 2009 (Austria, Denmark, Italy), 2010 (Estonia, Finland, France, Hungary, Spain), 2011 (Norway, Sweden), 2012 (Netherlands, Romania), 2013 (Germany, Poland, Switzerland).

\textsuperscript{36} Covered by the dimensions ‘physical care, supervision of child’, ‘teaching, reading, talking with child’, ‘transporting a child’. Care of the sick/elderly is covered in one category ‘informal help to other households’, it is not clear if informal care towards elderly is included in this category.


\textsuperscript{38} The four distinctly childcare related variables include ‘physical or medical child care’, ‘teach a child a skill, help with homework’, ‘read to, talk or play with child’ and ‘supervise, accompany, other child care (Gershuny, J. & Fisher, K., 2016: 42).
is under-developed conceptually and in data collection. Comparative time-use studies are crucial in monitoring differences and developments in countries’ gendered division of wage and non-wage labour. For adequate policy-making, comprehensive disaggregated data on domestic and intergenerational care responsibilities must be collected, made available and monitored over time. Only then can the full extent of the gendered division of wage and non-wage care work be captured and effective policies be developed to support gender equality.

3.3 Equal Share in Economic Security

To measure Equal Share in Economic Security between men and women, three interrelated sub-dimensions were chosen: i) The Gender Wage Gap, ii) The Gender Gap in Risk of Poverty or Social Exclusion and iii) The Gender Gap in Non-Standard Employment. To receive one score for each country representing the key-dimension Equal Share in Economic Security, the geometric mean of the three sub-dimensions was calculated. An overview of the scores is presented in Table 5.

i) The Gender Wage Gap

Differences in earnings between men and women are often due to other forms of gender inequality in the labour market. For instance, sectoral and occupational segregation (ESMS, n.d.: section 3.4) lead to women holding less prestigious and lower-paying jobs (ILO, 2016a: 52). Women also experience multiple forms of workplace discrimination, undervaluation of their skills and knowledge as well as unequal promotion opportunities (European Commission, 2011: 7; ILO, 2016a: 57ff). The effects of unequal wage structures are many: active women are more likely to be threatened by poverty while they also receive lower disability and life insurance benefits (AAUW, 2017: 5) and retired women are at greater risk of being impoverished too since, on average, their lower wages result in lower pensions relative to men’s (European Commission, 2011: 17). Therefore, measuring, monitoring and targeting gender wage gaps are crucial elements of effective policy-making aimed at increasing gender equality within societies.

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39 Such as the “motherhood-penalty“ (additional wage penalty to the gender gap, where mothers earn less than non-mothers, while fathers receive a “fatherhood-bonus”), “statistical discrimination“ (assuming that women are less committed to their career and will prioritise family responsibilities), or “maternity-related discrimination“ (harassment due to pregnancy, childbirth, family responsibilities, requesting flexible working hours, etc.), to name but a few (ILO, 2016: 57).
### Table 5. Countries’ Scores in Equal Share in Economic Security

<table>
<thead>
<tr>
<th>Sub-Dimension</th>
<th>Gender Gap in Employment Security</th>
<th>Gender Gap in Risk of Poverty or Social Exclusion</th>
<th>Gender Gap in Non-standard Employment</th>
<th>Total Gender Gap in Economic Security</th>
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Source: Own calculations based on the data collected from the Eurostat (2017b, 2017c) and the European Commission (2016) report.

To form the *Gender Wage Gap* for each country, data for 2015 was taken from the Eurostat survey ‘Gender pay gap in unadjusted form by NACE Rev. 2 activity – structure of earnings survey methodology’. The data used captures “the differences between average gross hourly earnings of male paid employees and of female paid employees as a percentage of average gross hourly earnings of male paid employees.” (ESMS, n.d.: section 3.1) To form a ratio complying with the other sub-dimensions, the country-specific values (expressed as a percentage; e.g. Belgium 6.5%) were subtracted from 100 and divided by 100 (e.g. resulting in 0.94 for Belgium). The survey draws upon national sources measuring income differentials.
based on a common definition,\(^{40}\) which increases the data’s comparability across countries. It captures employees in industry, construction and services sectors (excluding public administration, defence and compulsory social security) while controlling for different employment structures (full- versus part-time) across 6 age groups\(^{41}\) (ESMS, n.d.: section 3.1). However, this dataset’s statistical population is restricted to employees in organisations with more than 10 employees (ESMS, n.d.: section 3.4) and therefore limited in representativeness. The dataset provides a general overview of gendered income inequalities, since it measures the average gross hourly earnings of female and male paid employees, with averaged earnings calculated as arithmetic means (ESMS, n.d.: section 3.4).

The unadjusted nature of the measurement entails the gender gaps to be “broader than the concept of equal pay for equal work” (ESMS, n.d.: section 3.4). It is argued that “the pay gap is linked to a number of legal, social and economic factors which go far beyond the single issue of equal pay for equal work“ (Eurostat, 7\(^{th}\) of March 2017). Consequently, it is disputed which adjustment measurement should be applied (Eurostat, 1\(^{st}\) of March 2016) – whether to control for class, race/ethnic affiliation, educational level, age, labour market experience, or type of job, etc. For instance, Mandel and Shalev (2009) demonstrated through comparative analysis that gender wage gaps are “jointly generated by men's and women's unequal representation in the class hierarchy and the extent of inequality between and within classes.“ (2009: 1877). In other words, women’s subordinate position in the class hierarchy entail gendered employment patterns (i.e. part-time employment) and positions (i.e. women hold lower-quality jobs which are lower-paid). In their conclusion, Mandel and Shalev argue that policy and theory concerned with gender equality should prioritize “ameliorating class differences” since “class inequality inflates the gender wage gap” (2009: 1901). Regarding racial inequality, for instance, the Fawcett Society (2017) demonstrated different levels of gender wage gaps in the UK depending on ethnic affiliation, leading them to label this phenomenon “the ethnic gender pay gap” (Fawcett Society, 2017: 4). Hence, gender wage gap data for a large number of countries modelled to control for multiple intersecting factors influencing women’s earnings disadvantage is still needed.

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\(^{40}\) The common definition follows the rules and guidelines on compiling national data on gender pay gaps, established in the Structure of Earnings Survey (SES) methodology from 2009 (ESMS, n.d.: sections 3.4, 11, 18.1)

\(^{41}\) However, it is not further specified which 6 age groups specifically.
ii) The Gender Gap in Risk of Poverty or Social Exclusion

The data was taken from the Eurostat survey ‘People at risk of poverty or social exclusion by age and sex’ for men and women. First, the geometric mean of women and men’s risk of poverty or social exclusion (as a percentage of population) over their life course\(^{42}\) was calculated separately for each country. Secondly, men’s risk was divided by women’s risk to form the Gender Gap in Risk of Poverty or Social Exclusion. According to Eurostat, individuals qualify as ‘at risk of poverty or social exclusion’ when fulfilling one of the following three criteria: ‘at-risk-of-poverty after social transfers (income poverty)’, ‘severely materially deprived’ or ‘living in households with very low work intensity’ (Eurostat, 6th of March, 2017). The first criteria refers to individuals whose income falls short of 60% of the national median equivalised disposable income after social transfers (Eurostat, 6\(^{th}\) of February, 2014). Individuals are considered ‘severely materially deprived’ when unable to pay for or purchase at least four items on a specified list including: a television set, a washing machine, a car, a telephone, regular meat or protein, rent/mortgage/utility bills, adequate heating at home, etc. (Eurostat, 6\(^{th}\) of March, 2017). Finally, individuals (18-59, excluding students between 18-24) are considered ‘living in households with very low work intensity’, when their ‘working hours ratio’\(^{43}\) is less than 20% of their total potential in the past year (Eurostat, 6\(^{th}\) of March, 2017).

iii) The Gender Gap in Non-Standard Employment

The past decades have been characterised by a global shift away from standard employment relations (SER) and an increase in non-standard employment (NSE) contracts for both men and women (ILO, 2016b: 2). While there is no commonly agreed upon definition of which forms the NSE contracts concretely encompass, it will here refer to self-employed (with and without employees), part-time employed (less than 30 hours) and individuals with fixed-term (seasonal, on-call) or temporary (non-permanent) contracts, in order to follow the definitions of the dataset used (European Commission, 2016: 7-8). While the standard employment contract is offered on an open-ended, full-time basis and includes social security benefits (such as pensions and unemployment, sickness/disability, maternity benefits), NSE contracts do not fulfil these criteria (ILO, 2016b: 8; European Commission, 2016: 7).

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\(^{42}\)Age groups >16, 16-24, 25-49, 50-64, 65<.

\(^{43}\)Refers to the number of months in the past year individuals had worked versus the months individuals theoretically could have worked. When an individual is employed part-time, the number of months in FTE are estimated on the basis of worked hours (Eurostat, 6\(^{th}\) of March, 2017).
Depending on the country of investigation, being employed on a NSE basis can have critical implications for entitlements to social security benefits, since often based on contribution levels. “Those in temporary and part-time jobs are more likely to have fewer contributions, lower wages, and/or shorter working hours than standard employees, thereby affecting their eligibility for benefits as well as the amount and duration of payments.” (European Commission, 2016: 13). These forms of employment result in a general re-commodification (i.e. increased dependency on and decreased bargaining power in the labour market), threatening the economic security and psychological well-being of both women and men. Such developments should be opposed in general – not merely to bring about more equal divisions of unpaid and paid labour – as it lies in the interest of society as a whole to protect itself from unfettered market forces. Reducing individuals’ protection through welfare state programmes exposes them to capitalist market forces, which treat their labour power as mere commodities. Since labour power is, however, a “fictitious commodity” it cannot be treated and traded like conventional goods without entailing negative consequences for society. Commodity labour power “turns both the labour market and labour process into sites of class struggle between capital and workers” (Sum & Jessop, 2013: 240) and threatens to “result in the demolition of society” (Polanyi 2001[1944]: 76).44

While the NSE is expanding within and across countries, the ILO reports women to be especially affected: “[t]hey hold the majority of non-standard, informal, temporary, part-time and low-paid jobs.” (2016a: 1) Therefore, contrasting the share of women employed on a NSE basis with the share of men is considered a central sub-dimension of the Equal Share in Economic Security. It must be mentioned, that when criticising the NSE this does by no means imply that labour markets should move back to the SER as it typically existed. As noted above, the SER was initially built upon “the male breadwinner/female caregiver gender contract” (Vosko, 2010: 209) and excluded women on a large scale, leaving them in a pre-commodified and economically dependent state. While SER had benefited men to a certain extent,45 women did not receive (equal) access to the labour market and hence social security benefits in the first place. However, when access to the labour market is universally granted to

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44 This argument cannot be developed in full length, as it dives into (grand) theories on class inequalities. While class inequalities are inherently interrelated with gender inequalities, as seen in section i) The Gender Wage Gap, discussing the effects of the (re-)commodification of labour would exceed the scope of this section by far. For readings in this regard see for example Polanyi (2001[1944]), Esping-Andersen (1990), Offe & Keane (1993), Sum & Jessop (2013).

45 According to Esping-Andersen (1990), this had been the case in social democratic welfare regimes characterised by highly decommodifying (i.e. universal and generous) social security programmes.
men and women and the welfare state’s social programmes exhibit high degrees of decommodification (i.e. generous and universal social security in turn increasing the workers bargaining power). SER provides a far less precarious and more gender equal situation than NSE. Alternatively, new forms of employment can be conceptualised to replace SER (in countries with low degrees of decommodification) and NES in general. However, new forms of employment relations must support principles of gender equality and decommodification in order to be considered an improvement.

To calculate *The Gender Gap in Non-Standard Employment* data from the European Commission (2016: 38, 39) was used, which reflects the percentage of women and men in non-standard employment as a percentage of the employed in total (age 15-64) in 2014. The data from the European Commission report draws upon their own calculations based on the Eurostat Labour Force Survey (LFS) 2014. It includes individuals in the categories self-employed, family-worker\(^47\), temporary full-time, temporary part-time and permanent part-time. The percentage of men employed in NES was put in relation to the percentage of women in order to form the gender gap.

3.4 Equal Share in Representation

This key-dimension comprises three sub-dimensions:

i) *Representation in Education* (measured through the *Gender Gaps in Educational Attainment of Upper (Post-)Secondary Non-Tertiary* as well as *Educational Attainment of Tertiary Education*)

ii) *Representation in Research, Science and Engineering* (measured via *Gender Gap in R&D* and *Gender Gap amongst Scientists and Engineers*)

iii) *Representation in Politics* (measured through the *Gender Gap in National Parliaments*)

The key-dimension measures the equal access to as well as the participation in educational institutions, while additionally looking at the occupational segregation in “male-dominated”

\(^{46}\) For a discussion on alternative solutions to employment regulations with consideration of notions of gender and citizenship, see for instance chapter 7 in Vosko (2010).

\(^{47}\) In this report, family-workers are defined as individuals working on a non-wage basis (i.e. informally paid) in small family businesses, who therefore do not pay social contributions and hence do not have access to social benefits from this job. For instance, this form of non-standard employment is significant in countries like Romania, and to a lesser extent in Greece and Slovenia (2016: 10).
fields such as research, science and engineering (OECD, 2016a: 29; EIGE, 2013: 24). As with the other key-dimensions, the geometric means of the variables were formed in the respective sub-dimensions, which were then taken together to form the main dimension Equal Share in Representation by forming a geometric mean across the sub-dimensions. The country’s scores are presented in Table 6 at the end of this brief introduction to the last key-dimension.

Although half of the gender (in)equality indices mentioned above measure dimensions relating to the corporate representation of women in “top decision-making positions” (EIGE, 2013: 28), a comparable sub-dimension is not be included in this index. While acknowledging that women are underrepresented in managerial positions and boards (ILO, 2016: 41), it is argued that this area should not be given priority in a gender equality index. Gender inequality undoubtedly exists in these higher echelons; it is argued, however, that this gap is primarily caused by class-based inequalities (Mandel & Shalev, 2009: 1901). Furthermore, when assuming so-called economic decision-making power within a corporate context, these decisions will be “informed by market rationality” (Rottenberg, 2013: 5), which tend to reify social inequalities. Ameliorating class differences “is clearly not in the interests of those women with the potential to break through the glass ceiling, since it would undermine the value of the prizes which they seek to share with privileged men.” (Mandel & Shalev, 2009: 1901) Women in these positions are well paid and receive more generous social and/or corporate benefit insurances, allowing them to privately purchase domestic and care services on the market. Consequently, they are not in need of public services for support. Closing the gap in managerial positions of corporations will benefit the upper class of women, while the vast majority of women still struggle to reconcile wage and care work. Furthermore, to measure women’s representation in corporate management positions and boards, reports and indices often employ data on large corporations, drawing attention away from gender inequalities in medium and smaller sized businesses in the analysis. This practice is therefore limited in representativeness and neglects women trying to ‘break the glass ceiling’ in medium and small size businesses. If genuinely concerned with the representation of women in high corporate positions, the analysis should include businesses of all sizes.

The preoccupation with gender gaps in management positions and boards is also common amongst ‘neoliberal feminist’ discourse, from which this thesis distances itself. Gaining momentum in the US, this new (main)stream of ‘feminism’ encourages (white, middle-class) women to stop “hold[ing] ourselves back in ways both big and small, by

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lacking self-confidence, by not raising our hands, and by pulling back when we should be leaning in”.⁴⁹ (Sandberg, 2013: 8) What is harmful in this new stream of so-called ‘feminism’ is the meritocratic notion of emphasising the individual’s responsibility to change and overcome “internal obstacles” (Sandberg, 2013: 10) if wanting to ‘break the glass ceiling’. Following this discourse, gender (and class) inequality seems to originate in the ‘private sphere’, which is highly misleading and, in fact, contradicts the majority of feminist theory. Emphasising individual’s responsibilities rather than the unequal societal structures as the cause of gender inequality, undermines solidarity and collective mobilisation, which would be needed to pressure policy-makers to act. In other words, the discourse completely fails to address the underlying unequal and oppressive societal structures (a practice originally at the heart of feminist thinking), which need changing and overcoming through adequate policymaking.

However, similar arguments as raised above can be applied to the sub-dimension *Representation in Politics*, as it is not a given that female politicians will act in the interest of gender and class equality. To put it in Zarkov’s words:

> “The key here is that women politicians – as much as men – often instrumentalize not just patriarchal assumptions about women, but also feminism and women’s struggles for equality, in order to further their own political gains and the interests of the elites they represent.” (2017: 4)

This point is without a doubt valid. It is argued though, that more diversity is to be strived for within the political arena – in Europe often occupied by white, middle-class, heterosexual, middle-aged males. For democracy to function properly, parliaments should represent the heterogeneity of society and its interests. Increasing the representation of women (of various backgrounds and classes) in politics would be one step in this direction. Also, a socially just selection of prospective members of parliaments needs to be based on competence and qualifications. With the expansion of education, it is now (if ever) decreasingly credible that the selection of the most competent candidates result in a majority of the types of men described above. Furthermore, amongst politicians within the political arena there still exists potential and possibilities to oppose neoliberal doctrines perpetuating

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⁴⁹ As advocated by Sheryl Sandberg in her 2013 Book *Lean In*. She encourages women to realise themselves by overcoming the “leadership ambition gap”, not shying back when asking for promotions or wage increases while simultaneously assuring women that they do not have to give up on motherhood and a healthy work-life balance – as long as they just “lean in” enough.
inequalities, whereas individuals managing corporations in general have presumably incorporated (and benefit from) them. It is unlikely to see male or female corporate managers genuinely supporting “human security, decent public services, [and] a state apparatus for which citizens are its most important constituency rather than large capital.” (Zakrov, 2017: 5) Assumingly therefore, the political arena offers more potential for changing social structures than the market. It should be understood, that critical position taken here is informed by Fraser’s notion that “we should reconnect feminist critique to the critique of capitalism – and thereby reposition feminism squarely on the Left.” (2013: 225).

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Equal Share in Representation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Representation in Education</td>
</tr>
<tr>
<td>Sub-Dimension</td>
<td>Gender Gap in Educational Representation</td>
</tr>
<tr>
<td>Austria</td>
<td>0.95</td>
</tr>
<tr>
<td>Belgium</td>
<td>1.04</td>
</tr>
<tr>
<td>Denmark</td>
<td>0.96</td>
</tr>
<tr>
<td>Estonia</td>
<td>0.93</td>
</tr>
<tr>
<td>Finland</td>
<td>1.08</td>
</tr>
<tr>
<td>France</td>
<td>1.15</td>
</tr>
<tr>
<td>Germany</td>
<td>1.09</td>
</tr>
<tr>
<td>Hungary</td>
<td>1.09</td>
</tr>
<tr>
<td>Ireland</td>
<td>1.02</td>
</tr>
<tr>
<td>Italy</td>
<td>1.06</td>
</tr>
<tr>
<td>Latvia</td>
<td>1.13</td>
</tr>
<tr>
<td>Lithuania</td>
<td>1.16</td>
</tr>
<tr>
<td>Netherlands</td>
<td>1.13</td>
</tr>
<tr>
<td>Norway</td>
<td>1.22</td>
</tr>
<tr>
<td>Poland</td>
<td>1.00</td>
</tr>
<tr>
<td>Slovenia</td>
<td>1.03</td>
</tr>
<tr>
<td>Spain</td>
<td>1.13</td>
</tr>
<tr>
<td>Sweden</td>
<td>1.06</td>
</tr>
<tr>
<td>Switzerland</td>
<td>1.10</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>1.01</td>
</tr>
</tbody>
</table>

Table 6. Countries’ Scores in Equal Share in Representation.
Source: Own calculations based on the data collected from Eurostat (2017e, 2017f) and The World Bank (2017).
i) Representation in Education

Since the 1980’s, various policies have been implemented which effectively increased women’s educational attainment (Ringrose, 2007: 472; EIGE, 2013: 23). While today women’s educational attainment exceeds that of men, historically it must still be recognized as a “relatively recent social achievement.” (EIGE, 2013: 23). Furthermore, as the OECD points out, while women outnumber men in graduating from tertiary programmes, they still remain less likely to pursue and graduate with doctoral degrees (2016a: 29). Educational attainment can be regarded a central aspect of gender equality: it functions as a precondition for developing knowledge and skills and widening individuals’ opportunities on the labour market, especially since the demand for high-skilled workers persists (OECD, 2016a: 90; EIGE; 2014: 23). While men’s employment rates are still higher than women’s for all levels of educational attainment and across countries, the OECD demonstrates that this gender gap is closing with women’s increasing educational attainment (OECD 2016a). Moreover, educational attainment has been linked to the reduction of the risk of unemployment and of poverty/social exclusion. It increases individuals’ economic performance (EIGE, 2013: 23) and thus their economic independence and security (Eurostat, 2016; EIGE, 2013: 24).

To put women and men’s representation in education in relation, two sub-dimensions were chosen: Gender Gap in Attainment of Upper (Post-) Secondary Non-Tertiary Education and Gender-Gap in Attainment of Tertiary Education. Data for both sub-dimensions was taken from the Eurostat survey ‘Population by educational attainment level, sex and age (%) - main indicators’. The survey differentiates between data on educational attainment in ‘Upper secondary and post-secondary non-tertiary education’ and ‘Tertiary Education’ for both sexes in 2016, covering the age groups 15-64.

ii) Representation in Research, Science and Engineering

Although women are represented in greater numbers in secondary and tertiary education, gender inequalities persist in regards to participation and performance in certain educational fields, such as science and engineering (OECD, 2016a: 29; EIGE, 2013: 24; ILO, 2016: 42). Women in high-income countries remain overrepresented in health service, education and social work (ILO, 2016: 23; EIGE, 2013: 66). This gendered occupational segregation has consequences for individuals’ future returns on the labour market; for instance, individuals holding engineering degrees earn around 10% more than graduates from other tertiary education fields (OECD, 2016a: 29). Therefore, “[o]ne of the key challenges of European
policy remains enabling and supporting non-traditional educational paths to create equal possibilities of choice.” (EIGE, 2013: 24)

To measure the gender gap in Representation in Research, Science and Engineering two variables were chosen: a) Gender Gap in R&D in government, higher education, non-profit organisations and business enterprises and b) Gender Gap amongst Scientists and Engineers.

Regarding the Gender Gap in R&D, the survey ‘Eurostat – Total R&D personnel by sectors of performance, occupation and sex’ was used, which covers the total number and number of women (head count, age unspecified) working in R&D in the mentioned sectors in 2013.\textsuperscript{50} To calculate the ratio, first the number of women was subtracted from the total number of R&D employees, to calculate the number of men. Then, the number of women was divided by the number of men working in R&D. While the survey offers FTE measures, data on women is missing for most countries, therefore head counts were chosen as the unit of measure. Ideally, data would be provided in FTE measures to control for part-time or flexible employment to reflect women’s employment patterns more accurately. Additionally, more recent data would be preferable.

To measure the Gender Gap amongst Scientists and Engineers, the Eurostat survey ‘HRST by category, sex and age’ was drawn upon, which documents the number of women and men (age 15-74) employed in science and engineering as a percentage of the total active population for the year 2015. The percentage of women was divided by the percentage of men to form the gender gap in these occupations.

\textit{ii) Representation in Politics}

On a large scale, European parliaments are non-inclusive as the proportion of seats held by women is remarkably low (EIGE, 2017a, 2017b). As discussed above, it cannot be inferred that every female politician will advocate gender and class equality. However, it is argued that for the sake of inclusion, political legitimacy and democracy, parity should be achieved within national parliaments. By including women at higher rates in political chambers allows for “the interest and needs of the whole population” (European Commission, 2001: 1) to be given representation and voice. Additionally, having women included in political decisions may increase the likelihood of policies being developed and implemented, which give greater emphasis to the reconciliation of wage and non-wage care work and foster gender inequality.

\textsuperscript{50} Switzerland is the only exception, for which the most recent data is from 2012.
To reflect the *Gender Gap in National Parliament*, data on the proportion of seats held by women (age unspecified) in national parliaments in 2016 was downloaded from the World Bank’s ‘World Development Indicators’, but the data’s original source is from the Inter-Parliamentary Union (IPU) (World Bank, 2017). The data was derived by dividing the total number of seats held by women by the total number of seats in national parliament. The national parliaments are either unicameral or bicameral\(^5\) (World Bank, 2017).

### 3.5 Analysis and Case Selection

In order to analyse the country’s scoring, to subsequently select notable cases for further investigation, countries were ranked in ascending order according to each key-dimension (see Table 7). What stands out at first glance is that no country consistently scores lowest or highest across the three key-dimensions. Most countries are variously positioned across the dimensions of gender equality, for instance Spain (scoring relatively low in the first, medium-high in the second, and high in the last dimension). However, Austria is amongst the four lowest scoring countries in each dimension. Therefore, Austria will be taken as the ‘Low Type’ country. Furthermore, the United Kingdom is located on the lower end of the medium-scoring countries across each dimension, hence taken into the category ‘Medium-Low Type’ for further examination.

When looking for high scoring countries, the patterns are less clear to distinguish. No country stands out as being consistently located at the top ends of the dimensions. Although Norway scores high in both *Equal Share in Wage and Care Labour* as well as *Equal Share in Representation*, it cannot be assessed whether Norway is consistently high across all dimensions due to the missing data on *Equal Share in Economic Security*. In addition, Norway can generally be characterised as an exceptional case since the local oil and gas industries provide revenues, functioning as a certain buffer against financial pressures experienced by other European welfare states. Faced with a different point of departure than more “common” (i.e. less fossil resource rich) European welfare states, the potential lessons learned from the Norwegian policy landscape is unlikely to be transferable to other cases. The exceptionality of and the missing data for Norway make it an unsuitable case for further analysis.

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\(^5\) In the case of unicameral parliaments the data refers to the single chamber, while in bicameral parliaments only the lower chamber is covered (see World Bank, 2017).
Table 7. Summary of the Gender Equality Index and Ranking of Countries.
Source: Own calculations based on the data collected from the surveys mentioned above.

Two other cases, Lithuania and Slovenia, both exhibit relatively medium scores of gender equality in Equal Share in Wage and Care Labour and Equal Share in Representation, while scoring relatively high in Equal Share in Economic Security. The two countries achieve equal scores in the first dimension, whereas Lithuania is exhibited as slightly more gender equal in the dimension Equal Share in Economic Security (0.01 points) and the dimension Equal Share in Representation (0.03 points). These two cases are interesting to examine in order to see whether their similarity in scoring can be traced back to a similar policy landscape. Conversely, insights can be gained if it turns out that their policy landscapes diverge considerably. Therefore, these two countries are taken forward and categorised as ‘Medium-High Type 1’ countries. Sweden on the other hand, scores high in Equal Share in Wage and Care Labour, medium-high in Equal Share in Economic Security and medium in Equal Share in Representation. Sweden is therefore not chosen as a high-scoring country but rather categorised as ‘Medium-High Type 2’.
In sum, these five countries are considered most notable and are taken forward for further analysis and proposition testing, presented in the following Chapter. Table 8 summarises the scores of the five countries again and Table 9 gives definitions for the different country categories made.

<table>
<thead>
<tr>
<th>Country</th>
<th>Category</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Austria</td>
<td>‘Low Type’</td>
<td>Scoring low</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>‘Medium-Low Type’</td>
<td>Scoring medium-low</td>
</tr>
<tr>
<td>Lithuania</td>
<td>‘Medium-High Type 1’</td>
<td>Scoring medium in Equal Share in Wage and Care Labour, high in Equal Share in Economic Security and medium in Equal Share in Representation</td>
</tr>
<tr>
<td>Slovenia</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sweden</td>
<td>‘Medium-High Type 2’</td>
<td>Scoring high in Equal Share in Wage and Care Labour, medium-high in Equal Share in Economic Security and medium in Equal Share in Representation</td>
</tr>
</tbody>
</table>

Table 8. Overview of the Chosen Countries’ Gender Equality Score

Table 9. Overview of Country Categories.
4. Policy Analysis and Proposition Testing – Austria, The United Kingdom, Lithuania, Slovenia and Sweden

In the following chapter *Employment-Related, Childcare and Eldercare Policy* of the selected countries (i.e. Austria, the United Kingdom, Lithuania, Slovenia and Sweden) are analysed in order to test the propositions formulated in chapter two. Effects of policies usually do not show themselves immediately but rather a time-lag exists between implementation and observable change. Most of the data underlying the gender equality index (i.e. the dependent variables) is for 2015. With respect to the time-lag, data on the relevant policy dimensions (i.e. independent variables) is collected for the most part for 2009. Unfortunately, in three cases reliable data was only available for later years: data on family leave policies are for the year 2010, data on elderly care services for 2011 and data on minimum income provisions for the elderly regard 2012.

It must be said that in the following when propositions are confirmed it implies that the data for the countries studied only indicates that the respective propositions apply to the chosen cases and not for all countries at all times. When propositions are not corroborated, it indicates that the suggested relationship between policy and gender equality need further refining and research. Universal claims and generalisations beyond this case analysis cannot be made. This chapter tests the theory formulated in chapter 2, by applying the theoretical propositions to the chosen cases. What follows after the analysis is a summary of the findings and a discussion on potential explanations of the origins of gender equality outcomes in the respective countries by drawing on their individual historic-institutional factors. The proposition analysis allows for a discussion and refinement of the theory, hence improving the framework for further research.

4.1 Employment-Related Policy

In the following, the propositions relating to the *Employment-Related Policies* will be discussed and tested. Table 10 provides an overview of the data for each country and dimension of this policy area.

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52 Data on *The Informal Care Labour Force* varies in years (2001-2013) and the data measuring the *Representation in Education and Representation in Politics* are from 2016.
<table>
<thead>
<tr>
<th>Sub-dimension</th>
<th>Variable</th>
<th>Source</th>
<th>Data Year</th>
<th>Austria</th>
<th>United Kingdom</th>
<th>Lithuania</th>
<th>Slovenia</th>
<th>Sweden</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Working Week</td>
<td>Number of Working Hours Required for Full-Time Employment (Hours)</td>
<td>OECD (2017d) – Average usual weekly hours worked on the main job</td>
<td>2009</td>
<td>41.2</td>
<td>42</td>
<td>39.9</td>
<td>38.7</td>
<td>38.8</td>
</tr>
<tr>
<td>Maternity Leave</td>
<td>Duration of Maternity Leave (Weeks)</td>
<td>Multilinks (2011)</td>
<td>2009</td>
<td>16</td>
<td>39</td>
<td>18</td>
<td>15</td>
<td>8.6</td>
</tr>
<tr>
<td></td>
<td>Maternity Benefit: Level of Compensation (Share of Earned Income)</td>
<td>Multilinks (2011)</td>
<td>2009</td>
<td>100%</td>
<td>40.5%</td>
<td>100%</td>
<td>100%</td>
<td>78%</td>
</tr>
<tr>
<td>Paternity Leave</td>
<td>Duration of Paternity Leave (Days)</td>
<td>Multilinks (2011)</td>
<td>2009</td>
<td>0</td>
<td>14</td>
<td>30</td>
<td>15</td>
<td>10</td>
</tr>
<tr>
<td></td>
<td>Paternity Benefit: Level of Compensation (Share of Earned Income)</td>
<td>Multilinks (2011)</td>
<td>2009</td>
<td>0%</td>
<td>24%</td>
<td>100%</td>
<td>100%</td>
<td>80%</td>
</tr>
<tr>
<td></td>
<td>Leave-Quotas Reserved for the Father (Months)</td>
<td>Multilinks (2011)</td>
<td>2009</td>
<td>0</td>
<td>3</td>
<td>0</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>Duration of Net Paternity Leave (Months)</td>
<td>Multilinks (2011)</td>
<td>2009</td>
<td>10/22/34</td>
<td>6</td>
<td>34</td>
<td>8.5</td>
<td>16</td>
</tr>
<tr>
<td></td>
<td>Parental Benefit: Level of Compensation (Share of Earned Income)</td>
<td>Multilinks (2011)</td>
<td>2009</td>
<td>28%</td>
<td>0</td>
<td>91.8%</td>
<td>100%</td>
<td>67%</td>
</tr>
<tr>
<td>Family Leave Policy</td>
<td>Duration of Paid Family Leave (Weeks)</td>
<td>Colombo et al. (2011: 147ff)</td>
<td>2011</td>
<td>2 for sick child; 1 for adult dependents</td>
<td>Not available</td>
<td>...</td>
<td>1 for sick child/spouse; severe illness up to 30 days</td>
<td>14. 2 (100 days) for terminal care</td>
</tr>
<tr>
<td></td>
<td>Family Leave Benefit: Level of Compensation (Share of Earned Income)</td>
<td>Colombo et al. (2011: 147ff)</td>
<td>2011</td>
<td>100%</td>
<td>Not available</td>
<td>...</td>
<td>80%</td>
<td>80%</td>
</tr>
</tbody>
</table>
a) Gender equality will be higher the lower the hours constituting the standard (full-time) working week

To compare the hours constituting a full-time Standard Working Week, data for the respective countries was collected from the OECD (2017d) survey ‘Average usual weekly hours worked on the main job’. The survey captures the annual working hours in 2009 of women and men in full-time, dependent employment relations for 2009. The average of the total number is then calculated to represent the usual weekly hours worked. A comparison of the countries’ data is visualised in Graph 1.

The hours making up a full-time working week in Austria are 41.2 hours and in the United Kingdom 42 hours. The more gender equal countries exhibit lower hours: 39.9 hours in Lithuania, 38.7 hours in Slovenia and 38.8 hours in Sweden. The data implies that more gender equal countries exhibit a lower number of working hours constituting a full-time work week i.e. the proposition a) is confirmed in this instance.

Graph 1. Number of Hours Constituting a Standard Full-Time Working Week. Source: OECD (2017d) Average usual weekly hours worked on the job.
b) Gender equality will be higher when maternal leave is well-paid and of moderate/short duration

Comparative data for 2009, documenting the duration and the level of compensation of maternal leave, was collected from the Multilinks (2011) database, which was created by Keck and Saraceno. The Duration of Maternity Leave measures the maximum length (in weeks) of standard maternity leave granted before and after childbirth, excluding extended leaves in the event of multiple births or other special circumstances (Keck & Saraceno, 2011: 28). Maternity Benefit is understood as a cash benefit granted (either through the state or obliged employers) during maternity leave as a percentage of income received prior to the leave (Keck & Saraceno, 2011: 29). When countries offer flat-rate payments, the share of income is calculated in reference to the average net income of an Average Worker (AW)\(^{53}\) (Keck & Saraceno, 2011: 29).

Lithuania offers leave durations of 18 weeks compensated at 100% of previous earnings. In Slovenia, maternity leave duration is 15 weeks also compensated at 100% of previous earnings, however only for women who have been paying social contribution for 12 months prior to leave. If contributions were not paid for the past 12 months 100% of the minimum wage is taken into account for the missing period. Finally, Sweden does not grant general entitlement to statutory maternity leave as such, since the country operates on a parental leave scheme. The Swedish parental leave scheme, however, reserves 60 days statutory leave for mothers specifically. Therefore, 8.6 weeks is taken as a value for Sweden’s maternity leave. Regarding the level of compensation, parental leave is compensated equally to Swedish sickness insurance, amounting to a share of 78% of income.\(^{54}\)

Austria, Lithuania and Slovenia are considered to offer leaves of moderate duration, which are well compensated. Sweden’s leave period is considered of short duration and of moderate compensation, while the United Kingdom’s maternity leave is of long duration and poorly compensated. Identified as the least gender-equal country, Austria has a maternity leave scheme in place, which according to the proposition should result in higher levels of gender equality. The same is true for Lithuania and Slovenia, which are considered as more

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\(^{53}\) Following Eurostat, the Average Worker (AW) is conceptualised as an unmarried person in a single household working on a full-time basis and paying social contributions. The average net monthly earnings of this AW are expressed in Euros and calculated individually for the respective country (mentioned in Multilinks, 2011).

\(^{54}\) Equal to the sickness insurance benefit, the factor of 0.97 is multiplied by 80% of the income qualifying for sickness cash benefits. The share of 78% of income is calculated using the formula \(100 \times 0.97 \times 0.8\) (Multilinks, 2011).
gender equal and therefore fit the proposition. Sweden, however, offers a short maternity leave period, but compensated on a moderate level. The moderate compensation at first glance contradicts the proposition. However, since maternal leave policies don’t exist per se but are embedded in the Swedish parental leave programme the greater context of the parental schemes including the incentives for fathers to take leaves (discussed in the following sections) should be taken into the analysis. The Swedish parental leave scheme dedicates non-transferrable leaves of equal duration explicitly to both the mother (2 months, treated here as maternity leave) and the father (2 months, treated below as leave-quota reserved for the father as part of the parental leave scheme). While unpaid leaves usually have familising effects (i.e. women taking on the care responsibilities and increasing financial dependencies), moderate compensations may still be considered defamilising when provided alongside leaves explicitly reserved for fathers (as in the Swedish case). Short durations with moderate compensation may be intended to encourage women to return to the labour market quicker and the leave dedicated to the fathers allow women to do so. This would result in equal sharing of care responsibilities and a reduction of women’s financial dependencies – hence, fostering gender equality.

The moderate duration and high compensation of maternity leave in Lithuania and Slovenia, as well as the more complex maternity/parental leave design in Sweden can be argued to contribute to gender equality. Therefore, the data implies that proposition b) is corroborated. The Swedish case shows, that short durations with moderate compensation may encourage women to return to the labour market quicker and allow them to do so by dedicating leaves explicitly to the fathers.

**c) Gender equality will be higher when men are incentivised to take paternity leaves (through offering high income replacement rates and/or offering leave-quotas reserved for fathers)**

The Multilinks (2011) database provides data on country’s paternity leave policies in 2009. The duration of paternity leave is defined as the maximum number of working days\(^{55}\) fathers are entitled to take off work (Keck & Saraceno, 2011: 50). The level of compensation (via the state or obliged employer) is expressed as the share of earned income received prior to the leave (Keck & Saraceno, 2011: 51). Leave-quotas are usually part of parental not paternity leave schemes (to be discussed in the following sub-section). Leave-quotas measure the

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\(^{55}\) One week is equal to five working days (Keck & Saraceno, 2011: 50).
“number of months of parental leave which is either reserved for each of the two parents or which is explicitly allocated to the fathers.” (Keck & Saraceno, 2011: 52)

In Austria, fathers do not have a statutory right to paternity leave but in some cases, collective agreements may include paternity leave regulations. Hence, the days of universal paternity leave are considered to be 0 and the compensation level is subsequently 0%. Austria attempts to incentivise fathers in a different way though: if the father takes a share of the parental leave, eligibility to child allowances can be extended up to 6 months. It is however doubtful that this will function as an effective incentive for men to take leaves, as the child allowances (as a share of net average income) range between 4.7% and 19.5% in Austria, depending on the number of children in a family (addressed in the following section on childcare policies). In most instances, the child allowances are likely to be set remarkably low compared to the opportunity costs of forgone employment, hence undermining the incentivising function for men to take the leave. In the United Kingdom, fathers who have worked for the same employer in the 26 weeks prior to the leave are entitled to 14 days. They receive a flat-rate payment\textsuperscript{56} for this period making up merely 24% of the monthly average net wage. After the paternity leave, three months of parental leave are reserved as a leave-quota for fathers, however unpaid. In Lithuania a maximum of 30 days of paternity leave is granted at a compensation level of 100% earned income. But in order to be eligible for the paternity leave, the father must be married to the child’s mother, therefore punishing unmarried couples, single mothers as well as same-sex families.\textsuperscript{57} Additionally, 0 months of parental leave (as a leave-quota) are reserved for the father following the paternity leave. In Slovenia, a maximum of 90 days of paternity leave is available to fathers covered by the parental leave insurance, while a minimum of 15 days of full-time leave is compulsory during the child’s first six months. The statutory 15 days are compensated at a rate of 100% of the father’s average earnings while the following 75 days are unpaid, although social security contributions are made based on the minimum wage. The social security contributions are considered insufficient incentives for fathers to take the leave, hence only the paid 15 days are counted here as paternity leave. Regarding the leave-quota reserved for fathers, the parental leave regulations foresee 80 days of leave for fathers. Yet, these days may be transferred to the mother, therefore not resembling a period reserved explicitly for the father. Hence, the

\textsuperscript{56} Approximately 130€ a week on a flat-rate basis; related to the monthly average net income of 2369€ this equals 24% (Multilinks, 2011).

\textsuperscript{57} A proposal to recognise the legal status of same-sex couples and families was made in parliament of the Republic of Lithuania on the 15th of June 2017. The majority of Members of Parliament, however, voted against the proposal (LGL, 15th of June, 2017).
leave-quota for fathers in Slovenia is regarded to be 0 months. In Sweden fathers, who have been employed for the past 260 days prior to the birth of the child, can take 10 days of paternity leave compensated at a level of 80% of earned income. Regarding the leave-quota, 2 months of the total parental leave are reserved explicitly for the father.

Lithuania offers a relatively long paternity leave with a well-compensated, income-related benefit. However it is only accessible to married couples, enforcing traditional ideals and undermining universality. Furthermore, leave-quotas for fathers are non-existent in Lithuania. Slovenia also offers a well-compensated benefit likewise on an income-related basis. The income-related benefits are argued by Morgan to form effective incentives for men to engage in caring (2009: 321). However, as argued previously, it privileges higher income classes with higher benefits and runs the risk of not universally incentivising fathers. In Lithuania for instance, this may lead to fathers of lower income class households not taking the leave at all, as opportunity costs of forgone employment are prohibitive and no compulsory days oblige fathers to do so. The incentives for fathers to take the leave offered in the Lithuanian paternity leave system are therefore limited in the universality of its defamilising effects. The defamilisation potential of the paternity leave scheme in Slovenia is hence also likely to be limited in universality. In the Slovenian case, however, this may be due to other reasons than primarily the income-related benefit incentivising income classes differently. Though the income-related compensation still privileges higher income classes with higher benefits, fathers in all income classes, including lower ones, are obliged to take at least 15 days of paternity leave. Although the compulsory 15 days can be seen as an effective incentive for fathers, a limitation emerges here nonetheless: paternity leave is only granted to fathers within the parental leave insurance, and not as a universal right. Data is needed to understand the coverage rates of leave insurances but it is likely that higher income classes are disproportionately covered by the insurance and hence benefit from its defamilising effects.

To understand the full extent of the limited universality of the defamilising potential of paternity leaves in both countries, further data would be necessary capturing the percentage of unmarried families with children in Lithuania who thus are not eligible to parental leave and the percentage of men of different income class households covered by parental leave insurance in Slovenia. Furthermore, Lithuania does not offer incentives for men to take parental leave, as no leave-quota is explicitly dedicated to fathers, as mentioned before. Since Slovenia allows for the parental leave dedicated to fathers to be transferred to the mother, this is not regarded as an incentive for men to take on care responsibilities. The 15 days of
compulsory leave are seen as a step in such a direction, although significant room for improvement remains (i.e. prolongation of leave duration and entitlement being deemed a universal right, not a privilege). In the case of Sweden, a moderate paternity leave compensated at a fairly high rate is offered alongside a universal, non-transferrable parental leave-quota of 2 months for fathers – both of these programmes are understood as effective incentives for fostering gender equality. Therefore, paternity and parental leave policies in Sweden are considered defamilising and following the proposition by offering both forms of incentives. In principle, Lithuania and Slovenia both fulfil the first condition formulated in the proposition, namely the high level of compensation. They do so in so far as both incentivise fathers to take paternity leave through generous income replacement rates, although not reserving leave-quotas for fathers. In the theoretical framework, the leave-quotas were understood as more effective incentives for universal defamilisation, since income-related benefits likely entail class inequalities. However, the findings regarding the relatively gender equal cases Lithuania and Slovenia suggest that high compensations may function as sufficient incentives for fathers to take on care responsibilities and that leave-quotas are not necessarily required to foster gender equality in these countries. Defamilising designs of paternity leave programmes including incentivisation for fathers remains ambiguous and needs further research. Hence, proposition c) is only confirmed, as it applies the Swedish case but is contradicted by the policy designs in Lithuania and Slovenia.

\textit{d) Gender equality will be higher when parental leave is well-paid and of moderate/short duration}\n
To test this proposition, data from the Multilinks (2011) database is drawn upon, which provides information on the \textit{Duration Of The Net Parental Leave}, level and duration of compensation in 2009. Deviating regulations may exist for self-employed individuals.

In Austria multiple parental leave durations are available: 10, 22 or 34 months of parental leave (excluding the 2 months of postnatal maternity leave). Compensation is independent of leave time but the level is affected by the option chosen. It is granted on a flat-rate basis, whereas compensation for the maximum parental leave time (i.e. 34 months) equals 28% of the monthly net average income.\textsuperscript{58} Unfortunately, the Multilinks (2011) database does not offer level of compensation figures for the other leave options; hence this figure is taken forward. The United Kingdom offers 6 months of parental leave to each parent as an individual right, however, without any parental leave benefit or child-rearing allowance

\textsuperscript{58} 624€ flat-rate per month equals 28% of the net average income of 2220€ in 2009 (Multilinks, 2011).
Lithuania offers all insured parents 34 months of leave, compensated for a period of 22 months at a level of 91.8% of previous earnings. In Slovenia, all employed, self-employed and farmers paying parental leave insurance are granted parental leave for 8.5 months compensated at 100% of net average income. Sweden offers all employed parents 16 months of paternity leave (excluding the 2 months of maternity leave) compensated at 67% of the average income for 13.8 months.

Again, it is not clear how high the entitlement rates to parental leaves in Lithuania and Slovenia are, since data regarding insurance coverage of the population is not available. Putting this aside, Lithuania offers a long parental leave (34 months), of which only 22 months are compensated. By not compensating the full 34 months, the intention may be to urge women to return to the labour market sooner, i.e. after 22 months. However, this paid period still represents a relatively long absence from the labour market, and the opportunity costs of almost 2 years of forgone employment will likely have a lasting negative impact on women’s professional careers and economic independence and security. The data on Lithuania therefore suggests that it does not fit the proposition. Slovenia offers a short (8.5 months) and well compensated leave covering the complete duration – therefore suggesting that the policy design fits the proposition. Sweden’s parental leave is of moderate duration (16 months) while the moderate compensation does not cover the whole period, but 13.8 months. The logic behind the low compensation may also be intended to urge women back into the labour market sooner, therefore shortening the absence and hence lowering opportunity costs far more significantly than in the Lithuanian case. Thus, the data suggests that proposition d) is partially confirmed, as it corresponds with the policy designs in the cases of Slovenia and Sweden, while contradicting the long parental leave duration in Lithuania.

e) Gender equality will be higher when short-term family leaves are available, which are of moderate duration and well-paid

Data on different country’s family leave policies, such as *Duration of Paid Family Leave* and *Family Benefit: Level of Compensation* was collected from the OECD report authored by

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59 The net parental leave of 34 months is excluding the 56 days (2 months) of postnatal maternity leave. The first year of the child’s life, the parental leave is compensated at a rate of 100% of previous earnings. After that, the compensation is 85% of previous earnings until the child is two years old. The compensation level of 91.8% is calculated by applying the following formula: \((10 \text{ months } \times 100\%) + (12 \text{ months} \times 85\%)/22 \text{ months}\) (Multilinks, 2011).

60 330 days are paid at 77.6% income replacement and for the remaining 90 days a flat-rate of 20€/day is paid, which is 28.8% of the average net income in 2009 (2121€). To arrive at 67% the following formula was applied: \((77.6 \times 330) + (28.8 \times 90))/420\).
Colombo et al. (2011). In Austria paid leave is granted for period of two weeks per year at a compensation level of 100% of previous earnings to care for a sick child. If an adult family member or other dependent is in need of care, only one week is granted per year (Colombo, 2011: 142). However, according to Fagan et al. only 20% of Austrian companies in 2004 offered such care leave arrangements (2008: 37). In the United Kingdom, paid family leave is not available. If an employee wishes to take unpaid time off, they can only do so in cases of emergencies and for a “reasonable” time, which apparently is considered to be two days (Colombo, 2011: 149). While not receiving compensation for this period, the pension credits are still granted by the state (Colombo, 2011: 149). Slovenia offers family leave of up to 7 days for a sick spouse or child. In cases of severe illness this leave can be extended to 30 days, and in extreme cases up to 6 months. This period is compensated at 80% of average earnings of the preceding 12 months. In order to be eligible to compensation, however, individuals must subscribe to the care leave insurance (Colombo, 2011: 148), implying non-universal coverage and easier access for higher income classes. Again, data could not be found on how many individuals are covered by this insurance. In Sweden, paid leaves are regulated at the national level and granted for 14.2 weeks (100 days) at a compensation level of 80% of wages but only in cases of terminal illness of a relative (Colombo, 2011: 149). Unfortunately, data on leave policies in Lithuania is not available.

Slovenia offers a short leave for children and moderate family leave in severe cases, both compensated at a fairly high level. The universality of entitlement to family leave is again questionable since data on insurance coverage rates is not available. Additionally, the leave is only granted for care of a child or spouse, therefore not covering individuals whose parents or other adult relatives are dependent. Third, it is not clear if the definition of spouse includes unmarried partners in need of care. In the case of Sweden, despite the favourable duration and compensation level, the leave is only provided in cases of terminal illness. Therefore, in less severe cases where non-terminal care is nonetheless required by elderly dependents, time off work is not granted. The data suggests that the leave policies therefore do not conform to proposition e). These findings imply that family leaves (especially to care for elderly dependents) do not foster gender equality. However, one should be cautions when making such an inference, as the effects of leave policies on gender equality may be moderated by the provision of (institutional or homecare) care services to elderly dependents, which may render family leave policies less important for eldercare. In other words, if elderly dependents receive sufficient care either through institutional or home care services, they rely less on family members to take time off work and tend to them. This would be seen as
defamilising, as labour market participation of the potential informal carer is not disrupted allowing them to maintain the same level of economic security and independence, while the elderly dependent is still receiving appropriate care. The share of elderly dependents receiving formal care will be discussed in the following, when testing the propositions relating to the eldercare policies.

4.2 Childcare Policy

In the following sections the propositions relating to the defined childcare policies will be discussed and tested. All the data used to test the respective propositions in this section was taken from the Multilinks (2011) database and refer to the country’s policy designs in 2009. Table 11 provides a summary of each dimension and the country data.

**f) Gender equality will be higher when universal entitlement to publicly funded childcare services is granted**

To test this proposition data providing information on Universal Entitlement to Public Childcare Services for Children < 3 Years and Universal Entitlement to Public Childcare Services for Children Age 3-5 is drawn upon.

Regarding the Universal Entitlement to Public Childcare Services, Sweden is the only country offering entitlement as a legal right, provided that both parents are employed. To assess the universality of entitlement, further information and data is needed since is not clear if the regulations foresee that the parents must be living together in the same household\(^61\) (i.e. in a dual-earner household) in order to qualify or if special regulations exists for single parents. In reference to the Universal Entitlement to Public Childcare Services, only Sweden and the United Kingdom provide childcare services to 3-5 year olds on a universal basis. Yet again, in Sweden both parents must be employed in order to be able to claim such services, making further information and data necessary to assess the actual universality of entitlement. The lack of universal entitlement in Lithuania and Slovenia challenges the formulated proposition and suggests familialism by default. Furthermore, the low gender equality score of the United Kingdom, despite the universal entitlement to childcare services, contradicts the proposition. Thus, the data suggests that proposition *f*) is not confirmed.

\(^{61}\) If so, data from the OECD (2016c) can be drawn upon, measuring the share of children (0-14 years) in households in which all members are employed, which in Sweden in 2009 was 76%. This however also includes children living with other household members than parents (OECD, 2016c). Ideal would be to draw upon data capturing the share of children whose legally recognised parents (hence including same-sex parents) are employed, irrespective of household composition.
<table>
<thead>
<tr>
<th>Sub-dimension (Pre-) Primary Education and Care Services</th>
<th>Variable</th>
<th>Source</th>
<th>Data Year</th>
<th>Austria</th>
<th>United Kingdom</th>
<th>Lithuania</th>
<th>Slovenia</th>
<th>Sweden</th>
</tr>
</thead>
<tbody>
<tr>
<td>Universal Entitlement to Public Childcare Services for Children &lt; 3 Years (Yes/No)</td>
<td>Multilinks (2011)</td>
<td>2009</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Childcare Usage (Share of Children Age 0-2 in Childcare)</td>
<td>Multilinks (2011)</td>
<td>2009</td>
<td>9%</td>
<td>35%</td>
<td>10%</td>
<td>31%</td>
<td>63%</td>
<td></td>
</tr>
<tr>
<td>Full-Time Childcare (Share of Children Age 0-2 in Childcare for ≥ 30 hours a week)</td>
<td>Multilinks (2011)</td>
<td>2009</td>
<td>2%</td>
<td>4%</td>
<td>9%</td>
<td>27%</td>
<td>37%</td>
<td></td>
</tr>
<tr>
<td>Universal Entitlement to Public Childcare Services for Children Age 3-5 (Yes/No)</td>
<td>Multilinks (2011)</td>
<td>2009</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Enrolment in Public (Pre-)Primary Institutions (Share of Children Age 3-5)</td>
<td>Multilinks (2011)</td>
<td>2009</td>
<td>80%</td>
<td>92%</td>
<td>68%</td>
<td>84%</td>
<td>92%</td>
<td></td>
</tr>
<tr>
<td>Opening Hours of Pre-Primary Education (Hours per Weekday)</td>
<td>Multilinks (2011)</td>
<td>2009</td>
<td>9.5</td>
<td>Public 6.5 (private 10)</td>
<td>11</td>
<td>10.5</td>
<td>11</td>
<td></td>
</tr>
<tr>
<td>Educational Services</td>
<td>Begin of Compulsory Education (Age in Years)</td>
<td>Multilinks (2011)</td>
<td>2009</td>
<td>6</td>
<td>5 (Northern Ireland Age 4)</td>
<td>7</td>
<td>6</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>School Hours: Minimum Teaching Time in Primary Education (Hours per Year)</td>
<td>Multilinks (2011)</td>
<td>2009</td>
<td>975</td>
<td>861</td>
<td>589</td>
<td>716</td>
<td>741</td>
</tr>
<tr>
<td></td>
<td>School Hours: Minimum Teaching Time in Secondary Education (Hours per Year)</td>
<td>Multilinks (2011)</td>
<td>2009</td>
<td>912</td>
<td>927</td>
<td>819</td>
<td>882</td>
<td>741</td>
</tr>
<tr>
<td></td>
<td>Attendance of before- or after-school childcare (Share of Pupils in the Fourth Year of Primary Education)</td>
<td>Multilinks (2011)</td>
<td>2009</td>
<td>54.3%</td>
<td>54.5%</td>
<td>45.8%</td>
<td>97.3%</td>
<td>84.5%</td>
</tr>
<tr>
<td>Financial Support</td>
<td>Universal Entitlement to Child Allowance (Yes/No)</td>
<td>Multilinks (2011)</td>
<td>2009</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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<tr>
<td></td>
<td>Child Allowance for One Child (Share of Net Average Income)</td>
<td>Multilinks (2011)</td>
<td>2009</td>
<td>4.7%</td>
<td>4.3%</td>
<td>6.4%</td>
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<td>4.6%</td>
</tr>
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<td></td>
<td>Child Allowance for Two Children (Share of Net Average Income)</td>
<td>Multilinks (2011)</td>
<td>2009</td>
<td>10.4%</td>
<td>7.5%</td>
<td>9.8%</td>
<td>17%</td>
<td>9.8%</td>
</tr>
<tr>
<td></td>
<td>Child Allowance for Three Children (Share of Net Average Income)</td>
<td>Multilinks (2011)</td>
<td>2009</td>
<td>19.5%</td>
<td>9.9%</td>
<td>22.1%</td>
<td>34.8%</td>
<td>15.9%</td>
</tr>
<tr>
<td></td>
<td>Tax Deduction for Families with Children (Yes/No)</td>
<td>Multilinks (2011)</td>
<td>2009</td>
<td>Yes</td>
<td>No</td>
<td>Yes (for Families with ≥3 Children)</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>
g) Gender equality will be higher when the share of children using childcare services and enrolled in((pre-)primary) institutions is high

Childcare Usage refers to the share of children age 0-3 cared for in formal childcare arrangements as a percentage of all children of this population (Keck & Saraceno, 2011: 63). Keck and Saraceno (2011) use data from the European Survey of Income and Living Conditions (EU-SILC). This data is, however, problematic since no differentiation can be made between public and (subsidised) private service provision. The authors claim that data referring to usage rates of public services for children 0-2 is difficult to measure since children make use of them on a full- or part-time basis. In the latter case this would imply that two children share one place in childcare institutions (Keck & Saraceno, 2011: 63). The argument is made that the small population of households with children age 0-2 lead to statistically unreliable or uncertain estimates (Keck & Saraceno, 2011: 63). Despite these limitations and due to the lack of available and reliable data on public care service usage, this data will be used to see how many children are in both public and private childcare services. Yet, by doing so the extent of potentially existing class inequalities, which interplay with gender inequalities, cannot be assessed. Graph 2 provides an overview of the data for the respective countries.

![Graph 2. Total Childcare Usage: Share of Children Age 0-2 in Childcare. Source: Multilinks (2011).](image-url)
In Austria, only 9% of the 0-2 year old population are in formal childcare. Lithuania exhibits an equally low share, namely 10%. In the United Kingdom, the share is larger with 35%. For these three cases, however, the data is reported to be uncertain or unreliable. This is not the case for Slovenia and Sweden: in the former 31% and in the latter 63% of children ages 0-2 are in childcare. Sweden’s high share is unsurprising, given the universal entitlement to childcare services.

*Enrolment in Public (Pre-)Primary Institutions*\(^{62}\) refers to the share of children age 3-5 enrolled in public (pre-)primary education institutions weighted by the yearly enrolment rates of the respective age cohort. The percentage of children attending private institutions is subtracted from this figure (Keck & Saraceno, 2011: 68). By excluding the share of children attending private institutions, this variable offers insight into potential class differences.

Graph 3 presents the figures for each country. In Austria 80% of the respective population is enrolled in public (pre-)primary education, while in the United Kingdom 92% of children (3-5). Lithuania exhibits the lowest share with 68% while Slovenia enrolls 84% in public institutions. Sweden exhibits the same high enrolment rate as the United Kingdom with 92% of children attending (pre-)primary education.

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\(^{62}\) The data on *Enrolment in Public (Pre-)Primary Institutions* used by Multilinks was gathered from Eurostat (2011) (mentioned in Multilinks, 2011).
To conclude, Sweden follows the proposition by exhibiting high shares of children (0-2 years) in childcare and high shares of children (3-5) in (pre-)primary institutions. However, the United Kingdom shows higher shares of children in childcare and enrolled in public (pre-)primary institutions than Slovenia and especially Lithuania, despite having a lower gender equality score than the two. Lithuania contradicts the proposition by exhibiting notably low shares of children (0-2 years) attending childcare and the lowest share of children (3-5 years) enrolled in public educational institutions. By implication, children are either being taken care of at home (implying familisation) or private resources need to be drawn upon to access the private market. Since lower income classes do not have the same opportunity to access the private market and thus are more likely to provide informal care, familisation is expected to be stronger in lower income classes. Along with Sweden the United Kingdom shows the highest share of children enrolled in educational institutions, yet exhibits medium-low scores in gender equality. This indicates that proposition g) does not apply as the data suggests that the usage and enrolment rates do not foster gender equality.

h) Gender equality will be higher when shares of children age 0-2 in full-time childcare are high
Data on the Full-Time (≥ 30 hours per week) Childcare (Share of Children Age 0-2)\(^{63}\) is again limited in reliability due to the reasons mentioned above. As before, this reported to be especially true for Austria, the United Kingdom and Lithuania (Multilinks, 2011). Furthermore, it is not possible to differentiate between public and private care services (Keck & Saraceno, 2011: 64). Despite these limitations, looking at different patterns of childcare usage (i.e. full-time versus part-time) can be helpful to assess the extent to which families can reduce their care responsibilities. Here too, the implications for class inequalities cannot be taken into consideration.

Graph 4 presents the data for each country. Although the data is uncertain (as reported above), it indicates that in Austria only 2% and in the United Kingdom only 4% of children (age 0-2) are put in childcare on a full-time basis (i.e. equal or more than 30 hours per week). In contrast to these two, Lithuania exhibits a higher share of children in full-time childcare, at 9%. The share in Slovenia is reported to be higher making up 27% and Sweden exhibits the highest share of children in full-time childcare, namely 37%. The latter two country’s share and gender equality scores align with the proposition, but Lithuania in total exhibits

\(^{63}\) The data on Full-Time Childcare Usage (Share of Children Age 0-2) presented by Multilinks draws upon data from Eurostat (2011) (mentioned in Multilinks, 2011).
remarkably low shares despite them being slightly higher than in Austria and the United Kingdom. This exception and the limited reliability of the data suggests that proposition h) is only partially confirmed.

Graph 4. (Full-Time) Childcare Usage: Share of Children Age 0-2 in Childcare for ≥ 30 Hours per Week.

i) Gender equality will be higher when the opening hours per week day of pre-primary education are longer

The *Opening Hours of Pre-Primary Education* refers to the standard business hours of the majority of pre-primary educational institutions in a country per weekday. In this type of institution, children may also be enrolled on a full-time or part-time basis (i.e. children may share a place), therefore these opening hours may not reflect the actual time children can spend in pre-primary education (Keck & Saraceno, 2011: 72). Again, the data does not capture differences in public and private services, except for the case of the United Kingdom.

Graph 5 provides a summary of the country data. In Austria childcare institutions are open 9.5 hours per weekday. In the United Kingdom, *public* pre-school childcare is open 6.5 hours per weekday, while private services on average are open for 10 hours. This implies that in the United Kingdom financially stronger families accessing private institutions can reduce

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64 It must be noted, that significant variation exists between regions in some countries (Keck & Saraceno, 2011: 72).
their care time to a larger extent than families who rely on public institutions. The former number is taken forwards for comparison. Opening hours per weekday in Slovenia are 10.5 hours and in both Lithuania and Sweden 11 hours. The country’s numbers of standard business hours of (pre-) primary institutions confirm proposition i), as the medium-high gender equal countries offer longer hours per weekday.

Graph 5. Opening Hours of (Pre-)Primary Institutions per Weekday.

j) Gender equality will be higher when compulsory education begins at an early age
Looking at the Beginning of Compulsory Education across countries is relevant since the earlier children have access to compulsory education, the sooner family’s time dedicated to care can be reduced. Employment can be pursued more intensively, reducing financial dependencies within the family and increasing economic security of the employed individual and the family. Graph 6 shows at what age compulsory education begins in each country.

In Austria, children attend compulsory education at the age of 6 and in the United Kingdom at the age of 5 (with the exception of Northern Ireland where compulsory education begins at the age of 4). In Lithuania compulsory education begins at age 7. In Slovenia it is set at the age of 6 and in Sweden at the age of 5. No clear pattern emerges with respect to the gender equality scores. Sweden shares the same compulsory age as the United Kingdom (excl. Northern Ireland) and Slovenia has the same regulations in place as Austria.
In Lithuania, compulsory education begins at the latest age. Hence, the analysed data does not align with proposition j) and suggests that the beginning of compulsory education does not bear on gender equality. The effects of the exact age at which compulsory education begins is likely depends on other factors such as childcare and pre-primary educational services. However, in Lithuania the shares of children attending such services is remarkably low, as discussed above, and hence do not seem to compensate for children’s late enrolment in education.

**k) Gender equality will be higher when minimum teaching time (school hours) in primary/secondary education are higher**

The relevance of looking at School Hours: Minimum Teaching Time in Primary/Secondary Education (Hours per year)\(^\text{65}\) is related to the argument made in the previous section. It reduces time dedicated to care, allows for employment to be taken up again or at a higher intensity and increases economic independence and security.

In Austria the minimum teaching time in primary education is 975 hours per year and in secondary education 912. In the United Kingdom\(^\text{66}\), pupils attend a minimum of 861 hours of

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\(^{66}\) Data on primary education refers to England and Wales. There is no data available for Scotland. The annual teaching time in primary schools in Northern Ireland is 665 hours. Regarding minimum teaching time in secondary education, the 927 hours refer to England. Secondary education teaching
primary and 927 hours of secondary education. Lithuania exhibits the lowest amount of minimum hours of education; 589 hours in primary and 819 hours in secondary education. Slovenia stipulates a minimum of 716 hours in primary and 882 hours of secondary education. In Sweden, the minimum hours are 741 hours per year for both primary and secondary education.

Surprisingly, the less gender equal countries prescribe more minimum hours of primary and secondary teaching time than the more gender equal countries. Austria, as the lowest scoring country in terms of gender equality dedicates the highest amount of minimum hours (see Graph 7). A high amount of minimum teaching time implies that the children need less parental supervision and care, which in theory could increase defamilisation and hence foster gender equality. However, the data presented contradicts proposition k). It is possible that the lower minimum teaching times are complemented by before- or after school programmes, which may still reduce the time parents need to dedicate to caring for their children thus compensating for the lower teaching times. The share of children attending before- or after school programmes are analysed in the following.

![Graph 7. School Hours: Minimum Teaching Time in Primary and Secondary Education. Source: Multilinks (2011).](image)

time in Northern Ireland is 855 hours per year and in Wales it is 950 hours per year. Again data for Scottland is not available (Multilinks, 2011).
1) Gender equality will be higher when the share of pupils attending before- or after-school childcare is high

To test this proposition, data measuring the share of “pupils in the fourth year of primary education who attend a school offering a childcare service on school premises before or after lesson times” (Keck & Saraceno, 2011: 79) was drawn upon. Although the data only captures the percentage of fourth year primary pupils, it is not specified why this grade was chosen as a reference point. Furthermore, the data is again problematic in that it does not allow for a distinction to be made between public and private schools (Keck & Saraceno, 2011: 79). Unfortunately, no alternative dataset capturing the attendance rates of before- and after-school programmes is available. This data is used despite its limitations due to the importance of such programmes for gender equality.

Graph 8. Attendance of Before- and After-School Childcare as a Share of Pupils in the Fourth Year of Primary Education.

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In Austria, 54.3% of pupils in the fourth year attend a school offering before- or after-school programmes. Similarly, in the United Kingdom 54.5% of fourth-year pupils go to such schools. In Lithuania only 45.3% of pupils are enrolled in such schools, constituting the lowest share, while Slovenia shows a remarkably high percentage of 97.3%. In Sweden the share is slightly lower, amounting to 84.5%. The data is summarised and presented in Graph 8. While Lithuania contradicts the proposition, Slovenia and Sweden follow it by exhibiting high shares of pupils attending before- and after-school childcare. Proposition 1) is therefore confirmed for the cases of Slovenia and Sweden. As mentioned above, the shares in Slovenia and Sweden especially may to some extent compensate for the lower minimum teaching hours in (at least) primary education and thus foster gender equality.

m) Gender equality will be higher the higher the level of child allowances, when tax deductions are offered to families with children and when both child allowances and tax deductions are available in addition to care services

All countries offer *Universal Entitlement to Childcare Allowances* and *Tax Deductions for Families with Children* are granted in Austria, Slovenia and Lithuania. However, Lithuania only grants tax allowances to families with a minimum of three children under the age of 18 (Multilinks, 2011). The Multilinks (2011) database offers information on the different levels of monthly *Child Allowances for One, Two and Three Children as a Share of Net Average Income*. If the level of allowances depends on family income, as in Slovenia, Multilinks (2011) calculates the level of allowance for a single earner household with an average income.

Austria offers child allowances of 4.7% of the average net income to families with one child, 10.4% to families with two and 19.5% to families with three children. The increase in care allowances for families with more than one child is less steep in the United Kingdom. Child allowances of 4.3% of net average income is granted to families with one child, 7.5% to families with two and 9.9% to families with three children. Allowances are higher in Lithuania: for families with one child the level amounts to 6.4% of the net average income, families with two children receive 9.8% and families with three children 22.1%. In Slovenia,

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68 In England the share is 60.9% and in Scotland 48.1%. The mean is formed to arrive at 54.5%. Data on figures in Northern Ireland are not available.
69 Information on the eligibility conditions for child allowances is taken from the MISSOC (2010) database (mentioned in Multilinks, 2011).
70 Information used by Multilinks is based on OECD (2010) data (Multilinks, 2011).
71 Multilinks draws on data provided by MISSOC (2011) (mentioned in Multilinks, 2011).
the amount of care allowance varies by the level of household income. For families with an average income and one child, the level of allowance is 6.3%. For families with two it is 17% and for families with three children it is 34.8% of the net average income. Sweden offers modest allowances: 4.6% for families with one, 9.8% for families with two and 15.9% for families with three children. Graph 9 provides a visualised overview of the respective data.

Lithuania and Slovenia offer the highest levels of care allowances. Slovenia additionally grants tax deductions to families with children, while in Lithuania deductions are only available to families with more than three children. However, both countries do not offer universal entitlement to childcare services, as seen in the sections discussing proposition f). Sweden provides child allowances of relatively moderate levels to dual-earner families while not offering additional tax deductions. By implication, tax deductions do not contribute to fostering gender equality. The data suggests that proposition m) is not confirmed.

Graph 9. Level of Child Allowance According to Number of Children as a Share of Net Average Income.
4.3 ElderCare Policy

Finally, the propositions relating to the eldercare policies will be discussed and tested. On the following page, Table 12 provides an overview of the data for each country and dimension.

\( n \)  Gender equality will be higher when individual entitlement to public elderly care services and care payments are based on need and not means-testing (of family members)

The Multilinks (2011) database offers information on whether access to care services or cash subsidies are solely based on the care needs of dependents without considering the financial resources of the dependent’s family. The information relates to the regulations in each country in 2009.

Only Austria and Sweden grant access to in-kind provision for care services or subsidies to pay for the services based on the dependent’s need. The United Kingdom, Lithuania and Slovenia take the financial resources of the dependent’s family into consideration when assessing eligibility. Therefore, in the latter cases, universality of access is not granted and, by implication, the family is made responsible to care for the dependent. The universal access offered in Austria and Sweden and the limited access granted in Lithuania and Slovenia, which in theory imply familialism, contradict proposition \( n \). These findings suggest that the entitlement regulations do not affect the level of gender equality in a country.
<table>
<thead>
<tr>
<th>Sub-dimension</th>
<th>Variable</th>
<th>Source</th>
<th>Data Year</th>
<th>Austria</th>
<th>United Kingdom</th>
<th>Lithuania</th>
<th>Slovenia</th>
<th>Sweden</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Services</strong></td>
<td>Universal Access to Care Services (Yes/No)</td>
<td>Multilinks (2011)</td>
<td>2009</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>Share of Dependent 65+ Population in Institutional Care</td>
<td>Lipszyc et al. (2012: 75)</td>
<td>2010</td>
<td>11.2%</td>
<td>4.7%</td>
<td>20.2%</td>
<td>11.5%</td>
<td>32.0%</td>
</tr>
<tr>
<td></td>
<td>Share of Dependent 65+ Population in Homecare</td>
<td>Lipszyc et al. (2012: 75)</td>
<td>2010</td>
<td>22%</td>
<td>20.6%</td>
<td>35.6%</td>
<td>6.6%</td>
<td>31.7%</td>
</tr>
<tr>
<td></td>
<td>Share of Dependent 65+ Population Without Formal Services</td>
<td>Lipszyc et al. (2012: 75)</td>
<td>2010</td>
<td>66.7%</td>
<td>74.7%</td>
<td>43.9%</td>
<td>81.9%</td>
<td>36.3%</td>
</tr>
<tr>
<td><strong>Financial Support</strong></td>
<td>Availability of Cash Allowance (Yes/No)</td>
<td>Multilinks (2011)</td>
<td>2009</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes (if not able to provide services)</td>
</tr>
<tr>
<td></td>
<td>Share of Dependent 65+ Population Receiving Exclusively Cash Benefits</td>
<td>Lipszyc et al. (2012: 16)</td>
<td>2010</td>
<td>approx. 56 %</td>
<td>approx. 32%</td>
<td>approx. 31%</td>
<td>approx. 18%</td>
<td>approx. 29%</td>
</tr>
<tr>
<td></td>
<td>Minimum Income Provision for Single Older People (Share of AROP Threshold)</td>
<td>Eurostat (2015: 137)</td>
<td>2012</td>
<td>81.7%</td>
<td>81.1%</td>
<td>39.9% (+10.02% housing benefit)</td>
<td>75.9%</td>
<td>Guaranteed pension 68.9% (+ 20.9% housing benefit); Maintenance support 100%</td>
</tr>
<tr>
<td></td>
<td>Minimum Income Provision for Older Couples (Share of AROP Threshold)</td>
<td>Eurostat (2015: 137)</td>
<td>2012</td>
<td>81.7%</td>
<td>82.6%</td>
<td>...</td>
<td>75.8%</td>
<td>Guaranteed pension 82% (+ 20.9% housing benefit); Maintenance support 87.8%</td>
</tr>
</tbody>
</table>
o) Gender equality will be higher when a greater share of elderly dependents are in institutional care rather than receiving homecare services

Data on the share of Dependent Population In Institutional Care and In Homecare is taken from the report by Lipszyc et al. (2012: 75) and refers to figures from 2010. In Austria, the 65+ dependent population in institutional care is 11.2% while 22.1% receive homecare (see Graph 10). In the United Kingdom the difference is even larger with 4.7% in institutional care and 20.6% in homecare. In Lithuania provisions cover a larger share of elderly dependents, with 20.2% in institutional care and 35.6% in homecare. Slovenia covers the lowest share of dependents in general, while specifically a greater share receive institutional care opposed to homecare, namely 11.5% and 6.6% respectively. Sweden covers the greatest share of dependents in total and provides both forms of care fairly evenly; 32% are in institutional care and 31.7% in homecare.

Graph 10. Provision of Institutional Care versus Homecare Services to the 65+ Dependent Population.
Source: Lipszyc et al. (2012).

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The report defines dependency as “generally refer[ing] to the inability to perform daily personal care tasks. It is often referred to as "ADL-dependency" i.e. difficulties in performing at least one Activity of Daily Living (ADL).“ (Lipszyc et al. 2012: 23). These ADL include eating, personal hygiene, cleaning, laundry, entering/leaving bed, etc.
With regards to the more gender equal countries, Lithuania does not seem to follow the proposition, since a greater share of elderly dependents receive homecare rather than institutional care. The total share of 65+ dependents covered in Slovenia is the lowest in comparison to the other five countries (see next section), but the distribution of the forms of provision follow the proposition. By offering more institutional care than homecare, Sweden also fits the proposition. Due to the Lithuanian case, proposition o) can only partially be confirmed. The data hence partially indicates that gender equality will be higher when more institutional care is offered to elderly dependents, as it is understood to have a greater defamilising effect. It is argued, that this is likely explained by the intensity of care received by dependents in institutional care being higher, leading to the dependents requiring less additional informal help by family members than when in homecare. Concrete explanations in regards to the intensity of care can only be made though when reliable data is available to draw upon.

p) Gender equality will be higher, the lower the share of elderly dependents without formal care services

Following the data referenced in the previous section, the Share of Dependent 65+ Population Without Formal Care Services can be compared. While dependents may not receive formal care services, they may be receiving cash benefits (discussed in the following) or are left to rely on informal care and privately purchased services. However, cash benefits as well as dependencies on informal care or the private market are considered familising.

Austria’s share of 65+ dependents without formal care is 66.7%, while the share in the United Kingdom is 74.4% (see Graph 11). Lithuania’s share of 65+ dependents without formal care services is 43.9% while Slovenia exhibits the highest share of 65+ dependents without services, namely 81.9%. Sweden on the other hand exhibits the lowest share of individuals not receiving formal care services, being 36.6%. While Lithuania and Sweden leave the lowest share of elderly dependents without formal care, Slovenia offers remarkably little public service coverage for their elderly dependent populations, implying a higher degree of familialism. Hence, propositions p) can only be partially corroborated, since it applies to Lithuania and Sweden but not to the case of Slovenia. See Graph 8 for an overview of the data.
Coming back to the importance of family leaves (discussed above), it was speculated that family leaves may be less relevant to gender equality when the provision of formal care services are high, as elderly dependents are receiving adequate care formally. For the Swedish case, the high percentage of elderly dependents receiving care make family leaves less necessary. However, when considering the low share of elderly dependents receiving formal care in Slovenia, this speculation does not stand. Low service provision and no possibility to temporarily take time off employment to tend to elderly dependents may likely entail the caregiver (predominantly women) to drop out of the labour market until care is no longer required. Yet both these issues do not seem to affect gender equality in Slovenia.

*a) Gender equality will be higher when the welfare state offers public care services rather than care allowances*

To test this proposition, the conditions regarding the *Availability of Cash Allowance* are analysed. Data is taken from the Multilinks (2011) database and refers to whether care allowances are granted in order to meet the needs of the dependent (i.e. to purchase services) or whether it is intended to compensate informal carers (Multilinks, 2011). Furthermore, the

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73 To recapitulate, the data indicated that Slovenia and Sweden (data is not available for Lithuania) only had family leave policies in place for cases in which a child/spouse was in need of care or in case of terminal illness. Family leave is therefore not at all available to care for elderly non-spouse dependents (in Slovenia) or not available to care for the elderly other than in terminal cases (in Sweden).
European Commission report authored by Lipszyc (2012: 16) provides information on the percentage of 65+ dependents without formal care services (i.e. institutional or homecare services) but receiving care allowances in 2010. This data will be used to assess the prioritisation of care services versus cash benefits in countries. As mentioned above, public cash allowances are generally regarded as familising irrespective of the beneficiary, while public care services are considered to be defamilising.

![Graph 12. Provision of Formal Care Services and Cash Benefits to the Dependent 65+ Population. Source: Lipszyc et al. (2012).](image)

Slovenia shows the lowest share of 65+ dependent population receiving cash benefits (18%) in place of services while the share receiving formal care services (18.1%) is also the lowest of all (see Graph 12). Since the share of 65+ receiving care services equals the share provided with cash benefits, it cannot be said that Slovenia emphasises services over benefits. Slovenia in general does not direct many resources to the elderly dependent population: 63.9% are reliant on informal care or privately purchased services without receiving any cash benefits, which is considered highly familising. Lithuania on the other hand offers more than 50% of the dependent population care services (55.8%) and 31% exclusively cash

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74 The share of elderly population without formal care services or cash benefits is calculated by subtracting the share of 65+ dependents receiving cash benefits from the share of elderly dependents without formal care services. E.g. for Slovenia the 63.9% are calculated by subtracting 18% (dependents receiving cash benefits) from 81.9% (dependents without formal care). This procedure was applied to every country resulting in rates for Austria of 10.7%, for the United Kingdom 42.7%, Lithuania 12.9% and Sweden 7.3%.
benefits, hence slightly prioritising the provision of care services over cash benefits. Sweden clearly follows the proposition with only 18% granted cash benefits versus 63.7% receiving formal care services. *Proposition q) is only partially confirmed*, as it applies to the cases of Lithuania and Sweden but not to Slovenia’s organisation of elderly care, which can be interpreted as having familising effects. In this case the implication is that not only does the low provision of services not affect gender equality in Slovenia but neither does the sparse provision of cash benefits.

\[r) \text{ Gender equality will be higher when the amount of minimum income provision for single older people is above the at-risk-of-poverty threshold}\]

The Eurostat (2015) report provides information on old age pensions systems in the EU in 2012. It reports on annual amounts guaranteed by *Minimum Income Provisions for Single Older People (Share of the At-Risk-Of-Poverty (AROP) Threshold)* in different countries, granted to the elderly population not qualifying for the standard/minimum pension due to their limited work history (Eurostat, 2015: 137). Commonly, these minimum income provisions are organised by specific social assistance programmes and in some cases, in addition to the income other supplements are granted, such as housing assistance or heating supplements (Eurostat, 2015: 137). The eligibility to specific social assistance schemes is usually determined via means-testing, while entitlement is independent from contribution history. In some cases “means testing can be extensive, covering all incomes of the household as well as assets and possibly also incomes of relatives (children) who may have obligations of mutual support.” (Eurostat, 2014: 132). The data measuring the minimum income provisions for the elderly (as a share of the AROP threshold) assumes that the beneficiaries are eligible to the full amount, i.e. they do not have any financial resources at their disposal and are hence eligible to the full guaranteed minimum income (Eurostat, 2015: 136).

Austria provides the minimum income via a specific social assistance programme (*Ausgleichszulage zu Pensionen aus der Pensionsversicherung*) as a compensation supplement to the pension (Eurostat, 2015: 132). Income granted to single elderly individuals amounts to 81.7% of the AROP threshold (Eurostat, 2015: 137). In the United Kingdom the minimum income is also organised through a specific assistance programme (*State Pension Credit – Guarantee Credit*), guaranteeing credit from age 60 to 65 (Eurostat, 2015: 132). The income provided to singles makes up 81.1% of the AROP threshold (Eurostat, 2015: 137). Lithuania provides the minimum income via a specific social assistance pensions scheme (*Šalpos pensija*) (Eurostat, 2015: 131). This scheme grants a minimum income to singles
making up 39.9% of the AROP threshold. In addition to this, Lithuania provides housing benefits which amount to 10.02% of the AROP threshold (Eurostat, 2015: 137). Slovenia offers a supplementary allowance (*Varstveni dodatek*) as part of specific social assistance from age 63 for women and 65 for men (Eurostat, 2015: 131). The provided minimum income amounts to 75.9% of the AROP threshold for single, elderly individuals (Eurostat, 2015: 137). While Slovenia additionally has a minimum pension programme (*Najnizja pokojnina*) in place granting income of 32.6% of the AROP threshold but entitlement is related to contribution history (Eurostat, 2015: 131, 137) – it is thus not taken into account in this analysis. In Sweden a universal flat-rate pension is guaranteed (*Garantipension*) to singles, which amounts to 68.9% of the AROP threshold (Eurostat, 2015: 132, 137) and is complemented by a housing benefit totalling 20.9% of the AROP threshold. In addition to this, maintenance support (*Äldreförsörjningsstöd*) for the elderly can be provided from age 65 upwards, as part of the specific social assistance programme, amounting to 100% of the AROP threshold and includes the housing benefit (Eurostat, 2015: 132).

![Graph 13. Minimum Income Provisions (and Housing Benefits/Maintenance Support) for Singles versus Couples as a Percentage of the At-Risk-Of-Poverty Threshold.](image)

Source: Lipszyc et al. (2012).

With the exception of Sweden, the situation is dire for beneficiaries of minimum income provisions as they are not sufficiently lifted above the AROP threshold (see Graph 13). In Sweden, when granted maintenance support (which includes housing benefits) in
addition to the guaranteed pension, the data indicates that the beneficiary receives income around 169% of the AROP threshold. Moreover, the guaranteed pension would imply recognition of non-wage care as labour in some instances: women whose employment history is significantly disrupted due to caring responsibilities throughout their life, they are nonetheless protected by the social security system by being entitled to minimum (although not very generous) income provisions and additional housing support. The situation in Lithuania is especially grave since, even when including the housing benefit, the minimum income support amounts to a 50% share of the AROP threshold. While the specific social assistance programme in Slovenia is slightly more generous relative to Lithuania, the minimum income provision granted nonetheless falls substantially below the AROP threshold. In conclusion, the data provided suggests that proposition r) is not confirmed as the amount of minimum income provision does not seem to be relevant to fostering gender equality.

s) Gender equality will be higher when singles/couples receive the same amount of minimum income provisions

Following the previous section, the Eurostat report (2015: 137) provides data on the differing amounts of minimum income provisions for elderly singles versus couples (see Graph 12). In Austria, the minimum income provision is shown to amount to the same for singles and couples (81.77%). In the United Kingdom couples receive a slightly higher income, amounting to 82.6% (versus 81.1% for singles) of the AROP threshold. In Slovenia the amount is virtually the same for couples (75.8%) as for singles (75.9%). In Sweden, couples receive a higher guaranteed pension (minimum income provision), namely 87.8% (versus 68.9% for singles) but in turn are provided with a lower amount of maintenance support (87.8% versus 20.9% for singles). Taking the guaranteed pension and the maintenance support together, the total amount is ever so slightly higher for couples (169.8%) than for singles (168.9%). Data on minimum income guarantees for elderly couples in Lithuania is not available. The situation in Slovenia aligns with the proposition, while Sweden’s regulations do not. Austria, scoring low in gender equality, offers the same amount irrespective of relationship status. Hence, proposition s) is not corroborated since the data implies that it is irrelevant whether singles and couples receive the same amount of minimum income. This is unsurprising in light of the previous proposition having suggested that minimum income provisions in general do not affect gender equality outcomes.
4.4 Summary of Analysis

This section summarises the findings of the policy analysis and proposition testing addressed above and discusses how close to each other the policy landscapes in Lithuania and Slovenia are. Furthermore, the potential importance of the interplay between the policy areas is addressed and factors, which need to be given attention in further research are pointed out.

In sum, 10 out of 19 propositions were supported, in some instances however only partially. Regarding the Employment-Related Policies, the proposition relating to family-leave is the only proposition contradicted by the data. The data suggests that gender equality is higher, the shorter the standard working week (constituting a full-time work week) and when the maternal leave is well-paid and of moderate/short duration. Furthermore, the data implies that high compensation rates (of paternity leave) may suffice as incentives to foster gender equality in Lithuania and Slovenia, since they both do not reserve additional leave-quotas for fathers but provide high income replacement rates (100% of earned income) to fathers. Their policy design goes against the formulated proposition, which therefore needs further investigation. In the case of Sweden, fairly high compensation and leave-quotas are offered to fathers, hence confirming the proposition. The proposition relating to parental leave could only be partially corroborated: Slovenia and Sweden both offer well-paid leaves of moderate/short duration while Lithuania offers a fairly well compensated (91.8%) leave but of long duration, in theory implying familisation. As leave policies remain ambiguous, further research must investigate how maternity, paternity and parental leave policy dimensions support or undermine defamilisation.

In total, only three propositions relating to Childcare Policies seem to apply yet in two instances the Lithuanian case only lends partial support. In Slovenia and Sweden the shares of children (0-2 years) in full-time (≥ 30 hours per week) childcare are relatively high and thus follow the proposition. Lithuania exhibits a higher share of children in full-time childcare than both Austria and the United Kingdom, but the total share of children (age 0-2) in childcare (i.e. part-time and full-time childcare) is amongst the lowest, alongside Austria. In other words, while the distributional pattern formulated in the proposition can be found, the overall share of children age 0-2 in childcare is low. This by implication has familising effects since the care responsibilities are barely collectivised and for the large part left to the family, likely burdening predominantly women. The next proposition accepted suggested that longer opening hours of (pre-)primary education institutions foster gender equality, as the medium-high gender equality cases exhibit longer opening hours than the lower gender equality cases. The last proposition relating to childcare policy could only be partially confirmed. Slovenia
and Sweden show high shares of pupils (in the fourth year of primary education) attended before- and after-school childcare, implying that a high share contributes to fostering gender equality. However, Lithuania exhibits the lowest share of pupils attending such programmes, despite having a medium-high gender-equality score. For the cases of Slovenia and Sweden, it had been argued that the high shares of before- and after-school attendance of children in the fourth year of primary education may to some extent compensate for the low minimum teaching hours in the those countries.

Three propositions concerning ElderCare Policies were confirmed, however only partially. Regarding the first, it was theorised that the more gender equal countries provide higher shares of elderly dependents with institutional care than homecare, since institutional care more likely reduces care responsibilities of family members as the intensity of care is expected to be higher. While Slovenia and Sweden follow the proposition, Lithuania offers homecare to a higher share of its dependent 65+ population. It must also be noted that while following the predicted distributional pattern (i.e. more institutional care than homecare), Slovenia in total offers both types of services to a highly limited share of dependents. For this exact reason, the following proposition was only partially confirmed: it had been theorised that the more gender equal countries will exhibit lower shares of elderly dependents without formal care. While Lithuania and Sweden conform to this, Slovenia exhibits the highest share of 65+ dependents without formal care of all five countries. By implication, this share of elderly dependents is thus reliant on either informal care provided through family members or on the private market, which is however only accessible to higher income classes. The final proposition posited that gender equality will be higher when the welfare state offers public services rather than care allowances. This applies to the cases of Lithuania and Sweden, yet Slovenia offers an equal share of elderly dependents services and care allowances. Furthermore, it cannot be said that service provision in Slovenia is prioritised over cash benefits as very little resources (services or cash benefits) in general are directed towards the elderly.

Coming back to the question of whether Lithuania and Sweden exhibit similar policy landscapes as they score similar in gender equality, the findings imply that this is not the case. The data suggests that Lithuania lags behind Slovenia (and Sweden) in the collectivisation and defamilisation of childcare responsibilities. This is reflected in lower share of children (age 0-2) in public or private (full-time) childcare, relatively low shares of children (3-5) attending public (pre)primary education, the late beginning of compulsory education, the low hours of minimum teaching time and the limited share of pupils attending before- or after-
school childcare. Rather than offering generous and universal public services, Lithuania tends to offer high child allowances (and tax deductions in addition in families with \( \geq 3 \) children). Such a practice is considered to follow notions of supported familialism, since offering financial transfers instead of public services generally encourages the sexual division of wage and non-wage care labour. Regarding Slovenia, the data suggests an opposite trend: Slovenia lags behind Lithuania in eldercare policies in terms of collectivising and defamilising eldercare responsibilities. While there remains room for improvement in both countries, Slovenia invests a remarkably low amount of resources – both services and cash benefits – to provide care for the elderly. Slovenia exhibits the highest share of elderly dependents reliant on informal care or privately purchased services, implying familialism by default to a large extent, which will predominantly (but not exclusively) perpetuate gendered divisions of care labour in lower income class families.

In addition, the data suggests that the Swedish policy landscape follows a logic of congruency across policy areas, which may contribute to the medium-high gender equality outcomes. The data suggests that in Sweden the maternity and parental leave may be designed to urge women back into the labour market quicker and allows them to do so by dedicating non-transferrable leaves to fathers to care. This is additionally complemented by offering entitlement to public childcare services to employed parents, reflected in the high shares of children (age 0-2) in childcare and the high share of children (age 3-5) enrolled in (pre-) primary education institutions. Through this collectivisation of responsibilities (i.e the state offering relief through service provision), childcare responsibilities are reduced. In addition to this, Sweden offers care services (institutional and homecare) to a notably high share of the dependent elderly population, by prioritising the provision of services over cash benefits. The collectivisation of eldercare responsibilities through the provision of public services reduces dependencies within families of all income classes, therefore increasing defamilisation. Hence, the data suggests that Swedish employment-related, childcare and eldercare policies together contribute to and even complement each other in reducing intergenerational care responsibilities for families irrespective of their income class.

The data analysed in regards to Lithuania and Sweden suggests that their policy landscapes are likely less complementary. In Lithuania’s employment-related policies, the long maternity/parental leave is likely to have familising effects. Moreover, the childcare policies further increase care responsibilities since the total share of children (0-2 years) in childcare is low, share of children (3-5 years) enrolled in public (pre-)primary institutions is low, the number of hours of minimum teaching is low as well as the share of pupils attending
before- and after-school childcare. As mentioned, Lithuania however does fare better in eldercare policies than Slovenia, by offering more services to the elderly dependents than cash benefits and exhibiting one of the lowest shares of the 65+ dependent population without formal services (behind Sweden). Slovenia’s employment-related as well as childcare policies corresponded closer to the propositions than Lithuania and are suggested to complement each other through their tendency to decrease care responsibilities. However, as mentioned when looking at Slovenia’s eldercare policies, the data suggests that eldercare responsibilities are insufficiently collectivised, as the share of dependents without formal services or cash benefits is by far the highest. Little resources are directed at the elderly dependent population, likely increasing familisation – especially in lower income class families. Hence, in addition to testing propositions individually relating to employment-related, childcare and eldercare policies, it should be considered in how far these policies complement or undermine their defamilisation potential. It is argued that not only does the number of propositions individually fulfilled matter but it is likely that gender equality is fostered when the policies from different areas complement each other. Further research needs to analyse these interplays of different country’s policies (and policy categories) and their effects on promoting the collectivisation of intergenerational care responsibilities for all income classes and the equal division of care labour within the family.

In order to expand the understanding of universal defamilisation tendencies of policies, further research should include measurements, which could not be accounted for in this analysis due to a lack of data availability. For instance, relating to the Employment-Related Policies the coverage rates of maternity, paternity and parental leave insurances in Lithuania and Slovenia should be included in order to assess the universality of the programmes. Regarding Childcare Policies, reliable data measuring the share of children age 0-2 in childcare is still needed, differentiating between public and private forms of provision. Furthermore, data on the average intensity of part-time childcare services (i.e. average number of hours children age 0-2 spend in childcare) needs to be collected. Also, data on the exact opening and closing times of childcare facilities per day are needed to see in how far they support the reconciliation of employment and parenting or affect employment patterns (i.e. whether they require one parent to reduce their intensity of employment, when for instance the childcare centres are closed some afternoons). Moreover, since the provision of meals in childcare and educational institutions would further reduce care responsibilities of parents making this an additional measure of interest for further research. Lastly, data measuring the share of pupils spend in before- and after-school childcare across different age
groups and grades would be helpful. The analysis of Eldercare Policy can be improved by including data on the intensity of institutional versus homecare (i.e. hours of care provided) in order to see how far dependents require additional informal care from family members.

4.5 Alternative Explanations of Gender Equality Outcomes

Drawing on historic-institutional characteristics determining different social stratification mechanisms (put forward by Esping-Andersen, 1990: 55ff), in comparison to policy dimensions, may prove fruitful for systematic analysis of different origins of gender inequality in the countries analysed. At this point, it is only possible to speculate on the effects of social stratification and gender equality. Further research will have to investigate this more comprehensively through comparative analysis.

i) Austria and the United Kingdom: The ‘(Medium-)Low’ Cases

At first glance, Austria and the United Kingdom may seem similar to each other since both score relatively low in the gender equality dimension. Yet, the existing gender inequalities likely emerge through different mechanisms in the two countries.

In Austria, the low scores of gender equality may be explained by drawing on its conservative stratification mechanisms (Esping-Andersen, 1990: 58). Accordingly, Austria scores high on conservative stratification, which means that traditional status relations are perpetuated (Esping-Andersen, 1990: 58). By implication, security is provided predominantly to (male) breadwinners to provide for their families, while women take on caring. Upholding traditional (familising) ideals renders women economically dependent as their labour market participation and attachment is hindered through the gendered division of care labour – hence, reproducing gender inequalities. The lack of incentives directed at fathers to engage in caring (no paternity or leave-quotas for fathers), lack of universal entitlement to childcare services and the subsequent low childcare usage (9% of children < 3 years) reflect this type of stratification. Furthermore, such familising policies likely explain the gendered division of wage and care labour\(^75\), women’s low levels of economic security\(^76\) and poor female

\(^{75}\) In Austria women on average spend 16.94 hours per day on care labour, while men only contribute an average of 8.68 hours. Furthermore, women exhibit rather low intensities of employment (53.5% female versus 76.5% male FTE employment rates).

\(^{76}\) On average, women earn 20.7% less then men and are overrepresented in NSE (57.3% versus 28.7% of men in NSE as a share of total employed). Women and men’s risk of poverty over life course (> 16-60 <) is more equal (19.32% of women versus 17.29% of men). The higher equality in the latter
representation in education, research/science/engineering and politics\textsuperscript{77} observed in the Austrian case (see Appendix 1).

The “liberal reformist” history in United Kingdom can be argued to have resulted in the social rights of citizenship being “patterned on the market” while “competitive individualism” was cultivated to a certain extent (Esping-Andersen, 1990: 63-64). What followed are diverging welfare realities for different income classes and inequalities. The medium-low gender equality scores in the United Kingdom may be explained by class inequality generally existing across society, which in turn exacerbates gender inequality. This is reflected in the high levels of income inequality measured as ‘Gini coefficient’\textsuperscript{78} (where as 0 is perfect equality and 1 perfect inequality) being 0.37 in the United Kingdom, constituting the highest income inequality across the EU-15\textsuperscript{79} members in 2009 (OECD, 2017e). Furthermore, the risk of poverty rates over the life course for both sexes are above the average of the analysed 20 countries, yet women (25.09%) are still at greater risk then men (22.91%, see Annex 2). In regards to the prevalence of NSE, the United Kingdom is again situated above the average of the 20 analysed countries but women (51.3%) are nonetheless remarkably overrepresented in such employment relations compared to men (29.8%).

\textit{ii) Lithuania and Slovenia: The ‘Medium-High Type 1’ Cases}

To recapitulate first, the “Medium-High Type 1” gender equality category Lithuania and Slovenia were placed in, was based on their medium scores in \textit{Equal Share in Wage and Care Labour / Equal Share in Representation} and their high scores in \textit{Equal Share in Economic Security}. The medium scores of both countries in the dimension \textit{Equal Share in Wage and Care Labour} is mainly due to an unequal distribution of non-wage care labour between the two sexes, which may be explained in large part by supported familisation tendencies in

\textsuperscript{77} Different from most countries in the analysis, slightly more men in Austria graduate from upper (post)secondary education, while gender equality exists in higher education (total gender gap in educational representation is 0.95). Women are poorly represented in research/science/engineering (gender gap of 0.47) and in politics (gender gap of 0.31). See Appendix 4 and 5 for the raw data.

\textsuperscript{78} Following the definition given by the OECD (2017e) the ‘Gini coefficient’ “is based on the comparison of cumulative proportions of the population against cumulative proportions of income they receive” while income „is defined as household disposable income in a particular year. It consists of earnings, self-employment and capital income and public cash transfers; income taxes and social security contributions paid by households are deducted.“

\textsuperscript{79} EU-15 includes Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Luxembourg, Netherlands, Portugal, Spain, Sweden and the United Kingdom.
Lithuania’s childcare arrangements and the familisation by default tendency in Slovenia’s eldercare policy. The intensity and continuity of employment is shown to be fairly equally distributed between the sexes in Lithuania and to a lesser extent in Slovenia (see Annex 1).\(^80\) By increasing the collectivisation of childcare responsibilities in Lithuania and of eldercare responsibilities in Slovenia, gender equality in the division of wage and care labour may be further increased.

Lithuania and Slovenia were not analysed when Esping-Andersen (1990) discusses his theory on social stratification, but their political history and diverging transition trajectory may contribute to identifying certain stratification principles occurring in both countries. First, their scores may be explained by drawing on their (soviet)communist past (i.e. socialist stratification principles): the politics in Central and Eastern Europe in the communist era followed ideals envisioning emancipation through encouraging women’s employment while intending to collectivise the care responsibilities through the provision of public services (Saxonberg, 2011: 53). The employment rates of women increased remarkably in this time, but not because women necessarily wanted to but rather needed to work as wage compressions rendered the male breadwinner wage insufficient to sustain a family (Saxonberg, 2011: 54). Efforts to reduce women’s care responsibilities remained largely ineffective, as the social programmes were poorly designed.\(^81\) In addition, it has been pointed out that “the ruling parties still believed that only women are capable of doing household tasks and taking care” (Saxonberg, 2011: 58). Hence, the fairly gender equal distribution of employment alongside the gender unequal distribution of care labour may be rooted in the communist legacies of both countries. It is conceivable that Lithuania reflects this legacy in the long parental leave duration (34 months), the insufficient incentives directed at men to take leaves (no leave-quota for men) and the lack of universal entitlement to childcare services and subsequently low childcare usage (10% of children < 3 years of age). In Slovenia, the transferability of father’s parental leave, lack of universal entitlement to child and eldercare services, low childcare usage (31% of children < 3 years of age) and especially the high share of elderly dependents without formal services (81.9%) may follow this notion. The high gender equality scores of both countries in the second dimension \textit{Equal Share in Economic Security} may also be linked to this political-historic past. Practices reducing class

\(^80\) The gender gap in intensity and continuity of employment is 0.91 in Lithuania and 0.83 in Slovenia.

\(^81\) Saxonberg points out that while for instance laundry services (as washing-machines were not available, same as dishwashers) and childcare facilities were offered by the municipality, this still entailed women having to take time off work to travel to bring/pick up the laundry or the children, hence insufficiently reducing care responsibilities predominantly taken on by women (2011: 54-55).
differences amongst workers under state socialism, such as the mentioned wage levelling may have affected the equal positioning of men and women in terms of economic security. These practices could explain the relatively equal treatment of men and women (although gender inequality still exists), which is reflected in both countries in below average gender wage gaps,\footnote{The arithmetic mean of the gender wage gaps of the 20 analysed countries is 15.2; Lithuania is slightly below this with 14.2 (hence a gender gap of 0.86) and Slovenia far below with 8.1 (gender gap of 0.92) (see Annex 3).} the close to perfectly gender equal prevalence of NSE contracts\footnote{In both Lithuania and Slovenia, NSE contracts as a percentage of total employed is equally distributed between women and men. In Lithuania 23\% of employed women and 22\% of employed men working under such contracts, making up a gender gap of 0.96. Slovenia scores exactly 1.0 (i.e. perfect gender equality), with 33.5\% of employed women and 33.6\% of employed men working under NSE contracts (see Annex 3).} and the equal risks of poverty or social exclusion; although the latter only applies to a lesser extent to Slovenia.\footnote{The gender gap in risk of poverty or social exclusion in Lithuania is 0.95 (30.18\% of women being at risk and 28.6\% of men), while the gender gap is larger in Slovenia, namely 0.81 (20.71\% of women and 16.86\% of men are at risk) (see Annex 2).}

Both countries constitute relatively new nations and democracies, meaning that they had less established structures when social and political institutions were set up. This may lead to the assumption that the medium gender equality scores in Equal Share in Representation are rooted their recent formation. However, when looking at the raw data, it quickly becomes clear that this does not apply. Although more women are represented in education in both countries (both having gender gaps above 1), they score low in Representation in Politics, especially in Lithuania (gender gap of 0.21 versus 0.37 in Slovenia, see Annex 4). Furthermore, the female Representation in Research/Science/Engineering in Slovenia exhibits a significant gender gap of 0.66 (in Lithuania 1.17, see Annex 4).

Despite both having experienced (soviet)communist rule, Lithuania and Slovenia do not form comparable cases, as demonstrated by exposing the divergence of their policy landscapes. The divergence may be explained by the different transition trajectories chosen after independence was claimed. The transition to post-soviet-communist Lithuania entailed a significant move away from state socialist ideals, replacing universality of the social security system with corporatists-conservative notions (i.e. eligibility to social programmes are based on employment history and social benefits are based on earnings) and ‘targeting practices’ (i.e. needs-based eligibility and minimal benefit provisions) (Aidukaite, 2009: 100). Lithuania spends little on social protection with 16\% in current prices as a percentage of GDP in 2009 and in the same year income inequality measured as ‘Gini coefficient’ was 0.36 – far above the EU-15 average of 0.29 (Aidukaite, 2011: 213; OECD, 2017e). Thus class inequalities and

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general insecurities exist across society in Lithuania, which is reflected in the notably high (despite fairly gender equal) risk of poverty over the life course (>16-64 <) for women and men in total (30.18% and 28.60% respectively, see Annex 2). Slovenia on the other hand, “went through fairly successful transitions” and remained closer to socialist ideals (Aidukaite, 2011: 212). Despite the low provision of services and financial transfers to the elderly, Slovenia exhibits the highest social spending in 2009, making up 21% of GDP. In 2009, the Slovenian income inequality of 0.24 (again expressed as ‘Gini-coefficient’) was below the EU-15 average (Aidukaite, 2011: 213; OECD, 2017e). Lower class inequalities and insecurities in Slovenia are also reflected in the far lower risks of poverty over life course in Slovenia for both women (20.71%) and men (16.86%) compared to Lithuania (see Annex 2). Thus, while it is plausible that both countries had treated women and men relatively equal due to their communist past, diverging transition trajectories likely explain the greater overall insecurities now existing in Lithuania.

iii) Sweden: The ‘Medium-High Type 2’ Case

Sweden was categorised as ‘Medium-High Type 2’, due to scoring high in the Equal Share in Wage and Care Labour, medium-high in Equal Share in Economic Security and medium in Equal Share in Representation. Again drawing on Esping-Andersen’s identified social stratification processes, Sweden scores high in measures informed by socialist principles: “universalism is the reigning principle” (Esping-Andersen, 1990: 75) and benefits are equally distributed independent of employment history or income level. This may tend to reduce class differences, which is reflected in Sweden’s risk of poverty rates being below the average of all 20 countries analysed for both sexes (see Annex 2). The medium-high gender equality scoring of Sweden may be explained through generally having relatively low class inequalities but higher gender inequalities, which are reduced but not erased by the class system. On average women earn 14% less than men (equalling a gender wage gap of 0.86, see Annex 3), remain at higher risk of poverty than men (17.3% versus 16.6%, see Annex 3), are more frequently employed on a NSE employment basis (43.5% versus 30.3%, see Annex 3) and exhibit lower employment intensities than men (63.8% versus 73.3%, see Annex 1). To see if these gender discrepancies are rooted in women being employed predominantly in the public sector and earning lower wages than men predominantly employed in the private sector (as predicted by Esping-Andersen, 1990: 227), more comprehensive and disaggregated data is needed. Data provided in Annex 4 shows that women are unequally represented in research and development in government, business, higher education and in non-governmental
organisation (gender gap of 0.50). It is not clear however, if this is rooted in a low representation of female researchers in the private sector (businesses and non-government organisations), since the sectors are lumped together. Disaggregated data showing the representation of women in public (i.e. government and higher education) versus private sectors (i.e. business and non-government institutions) for researchers but also other occupational positions is needed to see in how far the public-private sectoral-segregation persists and explains the existing gender inequalities in Sweden.
5. Conclusion

This thesis has provided a comparative analysis of gender equality and intergenerational care policies in European countries. The development of a theoretical framework allowed certain policies to be identified as plausibly relevant independent variables affecting gender equality, which were translated into testable propositions. These propositions reflect leading feminist contributions to comparative welfare state analysis, and thereby constitute academically relevant arguments to study empirically. Following this, a gender equality index was developed capturing specific gender equality outcomes deemed relevant to the reconciliation of wage and non-wage care labour, which are treated as dependent variables. The gender equality index is argued to fill the gaps left by other established indices. After calculating individual gender equality scores for 20 countries, five cases were selected on the basis of their differing performance: Austria was identified as the ‘Low Type’, the United Kingdom as the ‘Medium-Low Type’, Slovenia and Lithuania both as ‘Medium-High Type 1’ cases and, finally, Sweden as the ‘Medium-High Type 2’. The case’s individual policies were analysed and used to test the formulated propositions. Section 4.4 offers a summary of the analysis and section 4.5 provides a discussion on the potential explanations of the origins of gender inequality in the five countries.

The first valuable contribution made in this thesis is emphasising eldercare responsibilities, alongside those of childcare, as an equally important element in analysing and explaining gender equality. While gender inequality in the division of childcare has received considerable attention in previous literature, precisely the same gender bias exists in the division of eldercare. Subsequently, certain eldercare policies were taken forward as relevant independent variables affecting the reconciliation of wage and non-wage labour (i.e. gender inequality), alongside specific childcare and employment-related policies. One element of the employment-related policies – family leave policies – are included in the analysis since they have the potential to take time off work to care for an adult dependent while simultaneously maintaining labour market attachment. With regards to the gender equality index, an indicator measuring women and men’s time spent on caring for children and for the elderly was included. Including a measure capturing gender differences in time dedicated to eldercare is novel, as elderly care is not considered in any of the 10 established gender equality indices. Disaggregated data showing the exact time spent on caring for a dependent adult versus child was not available unfortunately. Further research will have to improve this as insights relevant to policy-making can be gained by analysis of disaggregated data.
The second important contribution is made by recognising care as a form of labour. Four main interrelated arguments are presented in relation to this and summarised in the following. First, recognising care as a form of labour places non-wage care labour next to wage labour. Consequently, care responsibilities (and the unequal division of it) are brought to the forefront and into the ‘public sphere’ by blurring the lines of separation between ‘private’ social reproduction and ‘public’ economic production. Treating care responsibilities as a public concern is necessary for adequate policy-making aiming to increase gender equality. Second, by recognising care (i.e. social reproduction) as a form of labour equally important to wage labour (i.e. economic production) rightfully increases the appreciation of the social value attached to care, forming the foundation of any properly functioning society and flourishing economy. Third, recognising care as labour encourages the redistribution of resources to carers who are contributing to the sustainability and functioning of a society and economy through their reproductive labour. Redistribution of resources (such as guaranteed pensions, sickness benefits or financial transfers) may reduce socioeconomic injustices experienced by those committed to caring – exploitation of labour, economic marginalisation and material deprivation (Fraser, 1997: 16). The redistribution of resources to reproductive labourers would additionally contribute to strengthening the value of non-wage care labour vis-à-vis wage labour. Fourth, recognising care as a form of labour emphasises that the welfare state plays a central role in determining the organisation of paid and unpaid care labour and the conditions under which formal and informal care is performed (Daly & Lewis, 2000: 285). As a last remark in this regard, it is crucial that the recognition of care labour and redistribution of resources is accompanied by the equal redistribution of care responsibilities across society (i.e. between the state and the family) and within the family. If this is not achieved, the gendered order remains unchanged and cultural injustices are more likely to prevail, including cultural-domination, non-recognition and disrespect (Fraser, 1997: 23). Redistributing care responsibilities across society entails their greater collectivisation through the public provision of childcare and eldercare services. Redistributing care responsibilities within the family requires labour market and social policies to support the reconciliation of wage and non-wage care labour as well as a transformation of the gendered order.

Alongside offering a theoretical discussion on the importance of recognising care as a form of labour, this thesis concretely does so by conceptualising non-wage care labour alongside wage labour in the gender equality index. Together they form one key-dimension ‘Equal Share in Wage and Non-Wage Care Labour’. Compared to other established gender equality indices such a practice is unprecedented, as care is conceptualised along side
activities of leisure, if at all. Besides these two main contributions, the thesis makes use of a more accurate measure of female employment patterns in the gender equality index by drawing on the intensity and continuity of employment, rather than merely looking at women’s labour market participation rates, as recommended by Daly (2000). Furthermore, the gender equality index includes a number of new EU members (namely Estonia, Hungary, Latvia, Lithuania and Slovenia), which are often missing in comparative analyses (Saraceno & Keck, 2008: 8). Regarding the independent variables, the number of hours (constituting a full-time standard working week) is included as a measure relevant to fostering gender equality. As pointed out by Gornick and Meyers the regulations of standard full-time working weeks are often neglected in family-policy discussions (2009: 23).

The findings derived from the proposition testing suggest that 10 out of 19 propositions can be (partially) supported. Regarding the Employment-Related Policies, the data shows that the more gender equal countries exhibit shorter standard working weeks (constituting full-time work weeks), have maternity leaves of moderate/short duration in place, and incentivise fathers through high compensation levels of paternity leaves and parental leaves. In addition to offering high compensation levels of paternity leave, Sweden incentivises men to engage in caring through reserving leave-quotas explicitly for fathers. Leave-quotas are not available in Lithuania and Slovenia despite their medium-high scores in gender equality outcomes, implying that they might not be necessary to foster gender equality. Mixed results were found too in regards to the duration of parental leave: Sweden and Slovenia both offer well-paid leaves of moderate duration, whereas Lithuania’s leave is of long duration. Moreover, the data suggests that three propositions relating to the Childcare Policies are confirmed. Slovenia and Sweden’s share of children (0-2 years) in full-time (≥ 30 hours per week) childcare are relatively high. Lithuania exhibits a higher share of children in full-time childcare than both Austria and the United Kingdom, but the total share of children (age 0-2) in childcare (i.e. part-time and full-time childcare) is amongst the lowest, alongside Austria. In other words, while the distributional pattern predicted in the proposition is confirmed, it should be noted that the overall share of children age 0-2 in childcare is low in Lithuania. Furthermore, the more gender equal countries exhibited longer opening hours of the childcare centres per weekday. The last proposition was only partially confirmed: Slovenia and Sweden both exhibit high shares of pupils (in the fourth year of primary) attending before- and after-school childcare, Lithuania however does not follow the proposition, despite exhibiting similar gender equality scores. Regarding the propositions concerning Eldercare Policies, three were confirmed however again only partially. Slovenia and Sweden both exhibit higher shares of
elderly dependents receiving institutional rather than homecare services, while this does not apply to Lithuania. Yet, while following the predicted distributional pattern (i.e. more institutional care than homecare), Slovenia in total offers both types of services to a highly limited share of dependents. In light of this, the following proposition was only partially confirmed: it had been theorised that more gender equal countries will exhibit lower shares of elderly dependents without formal care. This applies to Lithuania and Sweden but not to Slovenia exhibiting the highest share of 65+ dependents without formal care of all five countries and low investments directed at this population in general. The unconfirmed propositions should be refined in further research.

The proposition testing moreover indicates that Sweden’s policy landscape is more complementary, meaning that the employment-related, childcare and eldercare policies seem to follow the same logic of collectivising care responsibilities. This cannot be said for Lithuania and Slovenia. It is argued, on the one hand, that Lithuania’s childcare policies are less defamilising than those of Slovenia and Sweden. Slovenia’s eldercare policies on the other hand, are shown to be less defamilising than those of Lithuania and Sweden. Hence, Lithuania and Slovenia leave room for improvement in terms of their childcare and eldercare policies in order to reduce the unequal sexual division of wage and care labour found in both countries (See Annex 1). Further research is needed to understand the interplay of certain policy elements on defamilisation and the equal division of wage and non-wage care labour.

In the discussion of the findings, potential explanations – beyond the policy dimensions studied – for the origins of gender equality in the respective countries were presented by drawing on Esping-Andersen’s (1990) theory of social stratification. Austria was argued to perpetuate gender inequalities by reproducing traditional gender roles: male breadwinners are granted security to provide for the family while women take on care responsibilities. This conservative stratification mechanism may help explain the gender inequality found in Austria. In the United Kingdom overall higher levels of insecurity and class inequality are likely to exacerbate gender inequality. Potential explanations for the medium-high gender equal outcomes in Lithuania and Slovenia might be: a) their (soviet)communist past characterised by socialist stratification principles leading to the equal treatment of both sexes and b) their transition trajectories, which likely led Lithuania to replace the socialist principles with conservative ones while Slovenia maintained them to a larger extent. Finally, Sweden is speculated to exhibit higher gender equalities due to socialist stratification mechanisms increasing class equalities. While gender inequalities exist, they are not amplified through class inequalities as is likely the case in the United Kingdom. Further gender equality research
and policy-making will profit from a comparative historic-institutional analysis considering a wider range of economic factors (such as wage-setting, collective agreements, etc.), which may have second-order effects on gender equality by influencing the class system.

In conclusion, this comparative welfare state analysis has contributed to a refined understanding of gender equality and policies affecting the gendered division of wage and non-wage care labour. The insights revealed can guide further research and benefit decision-makers committed to reforming policy so to enable the move towards an egalitarian society.
Bibliography


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Annex 1. Equal Share in Wage and Care Labour

<table>
<thead>
<tr>
<th>Key-Dimension</th>
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<th>Gender Gap in Non-Wage Care Labour (Time Dedicated to Care)</th>
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Source: UNSD (2017a). Proportion of time spent on unpaid domestic and care work, by sex, age, and country.

¹ FTE Employment rates: Full-time equivalent employment rates.
² Gender Gap in Non-Wage Care Labour (Time Dedicated to Care) is calculated as the difference between the percentage of women and men dedicated to care activities.
³ Data Year Varying by Country.

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<th>Equal Share in Economic Security</th>
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<th>Geometric Mean: Total Risk</th>
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| **Source:** Eurostat (2017), *Poverty at risk of poverty or social exclusion, p60 povj*.
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**Source:** Eurostat (2017c) Population by educational attainment level, sex and age (%): main indicators [edat1_fe_1c]. Eurostat (2017a) Total R&D personnel by sectors of performance, occupation and sex [rd_p_persocc]. Eurostat (2017b) R&DST by category, sex and age [rdst_str_cat]. Note: * Data is from 2012.