

Informal Meeting of the Social Protection Committee

Bratislava, 20 September 2016

Thematic Review on
'Reconciliation between Private and Professional Lives'

**Presentation of the European Social Policy Network (ESPN)
Synthesis Report on *'Work-life balance measures for persons
of working age with dependent relatives'***

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Outline of the talk

1. EU level context: a 'new start' initiative on work-life balance
2. The European Social Policy Network (ESPN) Synthesis Report
3. Main findings
 - 3.1 Categories of support schemes for carers
 - 3.2 Carer's leave arrangements
 - 3.3 Carer's cash benefits
 - 3.4 Carer's benefits in kind
4. Challenges ahead
5. Recommendations to the Members States and the EU

1. EU level context: a 'new start' initiative on WL-B

- August 2015: European Commission Roadmap for *A new start to address the challenges of work-life balance faced by working families*
 - Replacing the 2008 COM proposal to amend the Maternity Leave Directive
- Commission launched consultation with the social partners in November 2015 on improvements to EU legislation in the area of work-life balance
 - as well as a broad public consultation on other possible EU support measures
- 2016 'Work Programme': COM announced 'new start' initiative on work-life balance (legislative and non-legislative measures).
 - Intention is to review EU regulatory and policy landscape in this field with a view to better tackling the challenges of work-life balance for parents and people with caring responsibilities

1. EU level context: a 'new start' initiative on WL-B (II)

- September 2016: end of second-stage consultation of the social partners at European level (decide whether or not they wish to negotiate)
 - Thematic Review on *'Reconciliation between Private and Professional Lives'* in Social Protection Committee (20/09/2016)
- Package adopted by COM in 2017?

2. ESPN input : Synthesis Report on the WLB of carers' of dependent persons

- 35 Thematic reports on the 'Work-life balance measures for persons of working age with dependent relatives'
 - Covering 28 Member States and 7 non-EU countries (CH, IS, LI, MK, NO, RS, TR)
- A Synthesis [Report](#): Bouget, D., Spasova, S. and Vanhercke, B. (2016)
- Focus is on the work-life balance of the **carers** (NOT the cared for) of **family dependent persons**
 - *Carer: 'working-age person who provides help to another person who is mainly a relative in need of LTC outside a professional or formal framework'.*
- Family ***dependent person***:
 - *'any person (whatever her or his age) who is chronically ill, disabled and/or frail and who therefore requires caring services over a long period of time'.*
 - children and adults with disabilities and the frail elderly.



2. ESPN input : Synthesis Report on the WLB of carers' of dependent persons

- Key question of the report:
 - *To what extent can working-age people who are caring for dependent relatives **balance work and caring responsibilities?***
- Two sub-questions: what is the **impact** of the **measures** available in your country on:
 - *Enabling those carers who wish to stay in the labour market?*
 - *The well-being – including the risk of poverty or social exclusion resulting from caring obligations – of both the carers and the cared-for?*

3. Main findings

3.1 Support schemes for carers

3.1.1 Categorisation

Table 1: Overall description of support schemes for carers

| Developed and mature support schemes for carers | | Underdeveloped support schemes for carers |
|-------------------------------------------------|-----------------------------------------------------------------------------|---------------------------------------------------------------|
| Universal and Comprehensive LTC arrangements | Provisions mainly to the dependent person and specific support to the carer | 'Familistic model': specific provisions (nearly) non-existent |
| DK, FI, IS, NO, SE | AT, BE, CH, DE, ES, FR, IE, IT, LU, NL, PT, RO, SI, SK, UK | BG, CY, CZ, EE, EL, HR, HU, LI, LT, LV, MK, MT, PL, RS, TR |

3. Main findings

A. 'Developed and mature' support schemes for carers : two subgroups

Countries with relatively *universal and comprehensive* LTC arrangements

(DK, FI, IS, NO, SE)

- A well-established, long-lasting tradition of LTC, regardless of the age of the dependent person: organising such care is seen as a **public responsibility**
- A mix between mostly short-term leave, cash benefits and benefits in kind specifically provided to the carer.
- A well-developed public system of in-home care support (medical assistance, household services)
- Institutional care is also available and represents a significant support for the WLB of the carer

Countries providing provisions *mainly to the dependent person* and specific support to the carer

(AT, BE, CH, DE, ES, FR, IE, IT, LU, NL, PT, RO, SI, SK, UK)

- Almost all of these countries provide generous leave conditions
- **All of them provide specific cash benefits targeted at the cared-for person, who uses them (de facto or sometimes obliged by law) to buy in care**
- Institutional care (residential care, day care, etc.) is rather well-developed. Some of these countries also have cash benefits targeted specifically at the carer (ES, FR, IE, NL, RO, SI, SK, UK)
- Benefits in kind are mainly granted to the cared-for person but are described by the experts as an important indirect support to the carer

3. Main findings

B. 'Underdeveloped support schemes for carers

A 'Familialistic model'

(BG, CY, CZ, EE, EL, HR, HU, LI, LT, LV, MK, MT, PL, RS, TR)

- Few or *no specific provisions* allow for the buying in of care.
- Benefits only to the *dependent person*: some experts assess these benefits as **insufficient**.
- Institutional care is *underdeveloped* in these systems, or there is a cultural reluctance to use the care available.
- Care structures and caring programmes exist but the administrative structures for managing them are *underdeveloped*.
- *Eligibility* conditions are often strict and depend on the age and on the dependency assessment of the dependent person, on the family relationship and even on gender.

! In most of these countries, carers remain **outside the labour market** despite the legal provisions on flexible hours and part-time work.

3.1.2 Support schemes for carers: Overall assessment

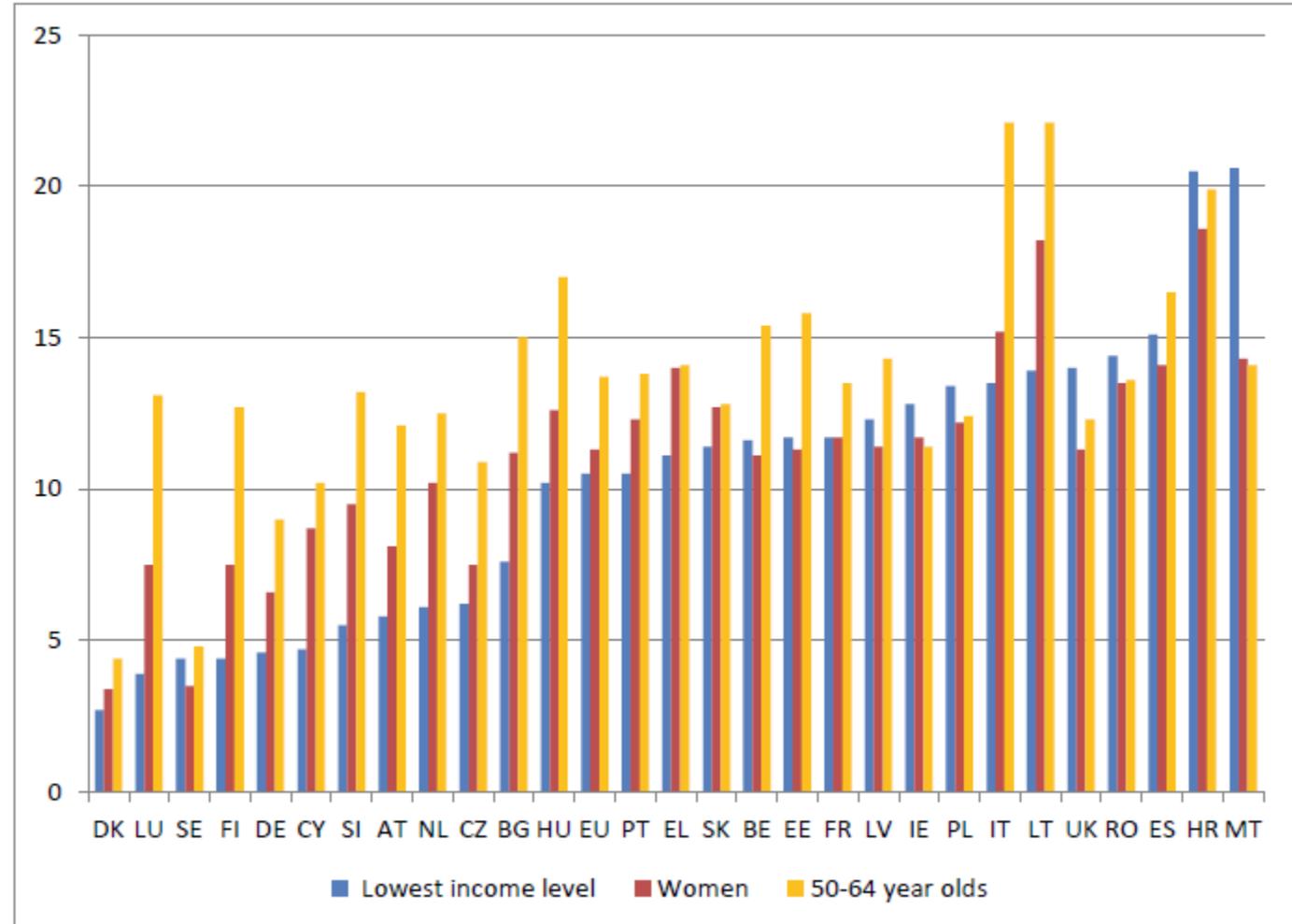
- General long trend of deinstitutionalisation for several decades.
- But there are issues of:
 - A shortage of beds; and *simultaneously*
 - Insufficient development of services to the cared for at home
 - except for the relatively universal and comprehensive LTC arrangements
- Consequently, a **strong disincentive effect on employment**
 - Affects especially women

3.2 Carer's leave arrangements

- Almost all the countries provide (except for LI) access to leave for carers of dependent persons, but wide variation regarding duration and eligibility conditions
- Only few countries provide leave for carers of *frail elderly* dependants
 - AT, DE, DK, FR, IS, IT, NO, SE).
- Employment effects of carers leave depend on the (a) structure of the labour market (b) eligibility for a carer's allowance or wage or equivalent (c) the supply of benefits in kind and (d) the rules on part-time work. Scarce data.
 - Example: In CY, CZ, HR, HU, MT, PL there are strong barriers related to the structure of the labour market that act as a strong disincentive to the employment of carers, such as poor development of the service sector and of female employment in general.

3.2 Assessment of carer's leave arrangements: Coverage

Figure 1: Percentage of people frequently involved in caring for their elderly or disabled relatives (2012, EU Member States)



On average (EU), 10.5% of low-income respondents declare that they frequently (i.e. 'every day' or 'several days a week') care for their elderly or disabled relatives.

The proportion of frequent carers among women is 11.3% and among the 50-64 year old 13.7%!

3.3 Carer's cash benefits: assessment

Coverage and take-up

- In the universal schemes of support (e.g. DK, SE, NO) the coverage is very high
- In other countries, it is increasing but currently slows down because of budgetary constraints
- Probably high **non-take-up** due to double condition of eligibility (carer and cared for), discretionary decisions by local authorities, means-tested schemes, and also the impact of the grey labour market in this sector.

Impact on the employment of carers

- In general, when the allowances are low, very limited effects on the work situation of the carers
 - CZ, EE, FR, HU, IE, LI, LT, LV, MK, NL, NO, PL, PT, RO, UK
- However, when the earning of the carer are low (poverty), even a low level of the benefit can influence the decision of staying in a job or rather shift towards care in the family.

Carer's cash benefits: the Slovak example

- The nursing allowance represents the only benefit available for informal carers. It allows for combining care and working to a certain extent because it is limited by the earnings ceiling set at the level of two times the subsistence minimum for an adult person per month.
- According to available estimates, **only 2%** of carers had paid (mainly part-time) jobs
- The amounts of the nursing allowance are quite low, exposing carers to vulnerable living conditions
- **A strong gender bias:**
 - The majority of nursing allowance recipients are women aged 25 – 59 years. In 2015, approximately 27,400 women in this age category received the nursing allowance, compared to approximately 6,700 men.

Source: Gerbery, Bednárík and Gecková, ESPN Slovak report on WLB 2016

3.4 Carer's benefits in kind

- Very few countries provide benefits in kind specifically for carers
 - DK, IE, IS, NO, SK, SE, UK
- Mainly respite care but also counselling, training, psychological support
- Significant local inequality of supply in some countries

3.4 Assessing the effectiveness of carers' benefits in kind

Coverage and take up

- Very low coverage and take-up due to underdevelopment, shortage at the local level: significant inequality, especially between the rural and urban areas.
- National policies and reforms are characterised by a reduction in the number of beds in residential homes, which are supposedly replaced by in-home services (e.g. DK, SE)

Impact on employment

- This reduction in the number of beds creates or intensifies bed shortages, higher non-take-up and pressure on at-home services. This has consequences on the employment rate, skills, and degree of pressure on the potential carers in the families.
- Countries which have a long tradition of local services to dependent services (Nordic countries) point to the intensive creation of job in the LTC sector. Therefore a double gain: for the carer who can stay in employment and job creation.

4. Challenges ahead

4.1 Changes in the demand for LTC

- Population aging : increase in the demand of care for elderly
- Changes in the family structure (single parents, working elderly who cannot take care of dependent grand-children etc.)
- Problem of the intergenerational co-residence: the carer and the severely disabled person

4.2 The gender issue

- In many countries: societal pressure on women to care for their relatives
- High sensitivity of women to the new reforms in LTC of dependent people (e.g. deinstitutionalisation without an offer of alternative services)
- Differences in the life cycle: situation of women 45-65 years old who are the most affected by this issue

4. Challenges ahead

4.3 Skills for caring

- Care generally considered as an unskilled job of the grey labour market and the impact of migrations
- Influence of the grey labour market and the impact of migrations

4.4 The well-being of carers

- Variety of situations. On the one hand, caregivers experience a good balance between work and care in the family (e.g. IE, NL). On the other hand, caregivers complain about the negative effect of psychological stress and the burden.

4.5 Budgetary constraints

- High risk of re-familialisation process because of cut offs in public budget could lock women into their traditional homemaker roles.

Political reflection on women's citizenship comprising their place on the labour market and their active participation in society in general is needed, especially in the light of revamped political discourse relegating women to their traditional family-care role.

5. Recommendations to the Member States

The SR puts forward a series of recommendations which build upon those made by the ESPN Country Teams in their national reports

- Countries with **underdeveloped** support schemes for carers should *design a coherent, comprehensive and transparent LTC system. They should build a strategy to develop all care benefits and services in a universal way.*
- Countries with **developed and mature** support schemes for carers should *design care benefits that include the objectives of employment and well-being for the carer*
- **All countries** should: *better balance employment of carers and well-being of family members; improve the design of carer's allowances; Benefits in kind and services; reinforce benefits in kind for caregivers: respite schemes, training, counselling etc.*

5. Recommendations to the EU

- **Improve the legal definition of ‘long-term care’ in Europe**, especially in the revision of the Regulation 883/2004 on the coordination of social security systems.
 - It will be important to have a similar understanding of what Member States consider as ‘LTC’.
- Continue to provide support, including through the **learning tools** of EU cooperation in the field of social protection and social inclusion, to countries that need to design and develop strategies on LTC to dependent persons.
 - Promote the use of the European Social Fund (ESF) to stimulate t



5. Recommendations to the EU (II)

- Promote the use of **EU funding** - notably the European Social Fund - to develop professional services, especially in the least developed LTC systems in Europe.
- Encourage Member States to better take into account the **gender dimension** in the implementation of LTC policies by
 - (a) gathering data on this issue (gendered statistics on leave and cash benefits take-up; polls on the well-being and employment status of carers, indicator of equal gender of labour division) and;
 - (b) disseminating information on the situation of carers
- Furthermore, in countries (mainly those with mature LTC systems) where reforms are characterised by new, familistic initiatives, the Commission could remind these national governments - social dialogue, European Semester - that they may fall short as regards **key European objective: gender equality**



Read more

- Synthesis [report](#)
 - Bouget, D., Spasova, S. and Vanhercke, B. (2016), Work-life balance measures for persons of working age with dependent relatives in Europe. A study of national policies, European Social Protection Network (ESPN), Brussels: European Commission.
- ESPN Thematic [Reports](#) on work-life balance measures for persons of working age with dependent relatives in Europe
- ESPN [website](#)

Feedback most welcome

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