Multilinks Database on Intergenerational Policy Indicators

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1. Introduction

The Multilinks Database on Intergenerational Policy Indicators is a collection of indicators on explicit and implicit intergenerational obligations as they are framed by public policies. The aim of the database is to describe how states define and regulate intergenerational obligations within the family. Indicators, therefore, include both legal norms and social policy measures from thirty European countries for the years 2004 and 2009. They cover a variety of policy fields: childcare, education, family benefits, pensions, long-term care and legal obligations to support. By means of these indicators, one should be able to assess to what degree public policies expect families to meet the financial or care needs of the very young or of the old on their own, and to what degree, on the contrary, policies support families that meet these needs either by supporting the providers through time allowances (leaves) and / or money (income transfers) or by taking up part of the responsibility through the provision of services and / or a minimum income guarantee.

The database has been developed as an online tool (http://multilinks-database.wzb.eu) provided by the Wissenschaftszentrum Berlin für Sozialforschung (WZB). The service is open to everybody and free of charge, but users have to register in order to access the data. The following section describes the conceptual framework and structure of the database, the scope of the database, and the accompanying services offered. In the final section, we present key findings from publications that used this collection of indicators as the basis for their inquiry.

2. Historical Genesis and Theoretical Framework

The database has been developed within the Multilinks project (see www.multilinks-project.eu).[1] The key objective of Multilinks was to explore how

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[1] The project was funded by the European Commission within the Seventh Framework Programme. A consortium of researchers from nine institutes carried out the project, which is coordinated by Professor Pearl Dykstra of Erasmus University in Rotter-

demographic changes shape intergenerational solidarity, well-being and social integration. The project examines multiple linkages between generations in families in terms of financial transfers, caregiving and emotional support. The conceptual approach builds on four premises. First, ageing affects all age groups: the young, the middle-aged and the old. Second, there are critical inter-dependencies between family generations as well as between men and women. Third, different analytical levels must be distinguished: the individual, the dyad (parent–child, partners), family, region, historical generation and country. Fi-nally, the fourth premise of the Multilinks project was to describe the national institutional context in which intergenerational relations are embedded. Within this context, public policies are an important element, as they provide the legal and policy framework that structures the life course of individuals (Kohli 1985), and at the same time shapes the conditions in which family generations interact (Blome / Keck / Alber, 2009). This understanding of public policies was the starting point for conceptualising and then developing the Multilinks Data-base on Intergenerational Policy Indicators (Saraceno / Keck, 2009).

2.1 (De)familialisation as a Conceptual Approach

The conceptual starting point for the development of the Multilinks database was the distinction between familialism, defamilialisation and supported famil-ialisation (see Leitner, 2003; Saraceno, 2010; Saraceno / Keck, 2010) in the pro-vision of financial support or caregiving to individuals not fully able to support themselves, as well as in the role of public policies.

The concepts familialisation and defamilialisation were developed by scho-lars (e.g. Orloff, 1993; Hobson, 1994; Saraceno, 1996) who were attempting to integrate a gender perspective into Esping-Andersen's decommodification con-cept by disentangling the various actors within the family. The authors of these works pointed to the importance of policies for the gendered division of labour and for women's autonomy and ability to be both commodified and decommo-dified.

According to conceptualisation this defamilialisation concerns both the de-gree of women's autonomy from the family (e.g. the spouse) in achieving fi-nancial resources and the degree to which women's unpaid work in the family, particularly unpaid caregiving, is substituted by paid labour from outside the family by means of public, market or third-sector services (Saraceno, 2000, 2004).

Although the origins of the concept of defamilialisation are rooted in the gender discourse, the concept has a broader meaning that includes an inter-generational perspective (Lohmann 2009: 95 f.). Reducing the dependency between family members defamilialises not only those who provide support (mainly women, at least when care is involved) but also those who receive care or financial support (children, elderly people, the young). From the point of view of intergenerational relations, defamilialisation concerns the degree to which needs may be satisfied without having to be fully dependent on family resources and solidarity (McLaughlin / Glendinning, 1994; Saraceno, 2010).

The way in which the state intervenes in the family sphere can be differentiated into three patterns along the familialisation / defamilialisation continuum (see Leitner, 2003; Saraceno / Keck, 2009):

1. *Familialism by default*, or unsupported familialism, in so far as there are no publicly provided alternatives to family care and financial support. This form of familialism can be implicit, but also explicit, as in the case of financial obligations within the generational chain and kinship network that are prescribed by law.

2. *Supported familialism*, in so far as policies, usually through financial transfers (including taxation relief and paid leaves), support families in providing caregiving and meeting financial responsibilities.

3. *Defamilialisation*, in so far as individualisation of social rights (e.g. with regard to minimum income provision or to receiving care) reduces family responsibilities and dependencies.[2]

The three approaches are not necessarily exclusive. Policy frameworks may offer different policy measures in sequence and sometimes even as alternative options, such as in the case of parental leave (supported familialism) and publicly provided or subsidised childcare services (defamilialisation). Leitner (2003) refers to the latter case – that of alternative options – as o*ptional familialism*.

2.2 Selection of Indicators and Database Structure

Within this conceptual approach, our objective in constructing the database was to identify indicators for legal norms and social policies which allow one to differentiate the three approaches to (de)familialisation.

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[2] In principle, defamilialisation also may occur through market provisions (e.g. through services provided on the market and private insurances against social risks). Yet the two paths to defamilialisation (i.e. state and market provisions) do not share the same conceptual standing, not only from the point of view of social justice, but also from the point of view of the role assigned to the family. Particularly (but not only) in the field of caregiving, recourse to services on the market is inevitably determined by available family resources. Families, therefore, remain a relevant and highly socially differentiated actor.

In doing so, we first identified policy areas which shape intergenerational solidarity and responsibility both up and down the generational line: from children to parents and from parents (and even grandparents) to (grand)children. Table 1 gives an overview of the policy areas that have been identified as relevant from the point of view of each of the three policy approaches.

Table 1

Approaches and policy areas

	Responsibilities towards children	**Responsibilities towards elderly persons**
Defamilialisation	Childcare provision Education	Pensions and minimum income provision for older people Publicly funded care provision for older people
Supported familialism	Maternity and parental leave Child-related benefits	Cash-for-care payments with no regulation of their use
Unsupported familialism	Obligations to support adult children/grandchildren	Obligations to support parents in case of need

Source: Keck/Saraceno (2010, 10).

The second step was to identify relevant indicators in each policy area. Because we are interested in how public policies explicitly or implicitly define intergenerational obligations, our focus is on public policy output in terms of legal social rights and public benefits or service provision. We do not consider data on public expenditure because, on the one hand, these data often do not allow one to differentiate between defamilialisation and supported familialisation and, on the other, for some areas – in particular with regard to expenditures for in-kind provision – data often are inaccurate or incomplete at the national level and poorly harmonised across countries. Moreover, unlike other authors (Bambra, 2004; Anttonen/Sipilä, 1996; Esping-Andersen, 1999), we do not include so called outcome measures, like the rate of labour force participation among mothers or poverty rates of elderly people. In fact, we hold that the link between behaviours (outcome) and policies (output) is not linear but rather mediated by many other context-specific factors. Outcomes may not be taken as direct consequences of policies, but only as the effect of the interaction between these and other context-specific factors (e.g. labour market conditions, gender and family values). Table 2 illustrates the breadth and detail of the collected information by showing, as one example, the available indicators for the policy areas of maternity leave and parental leave.

The choice of reference years and countries for the database partly depends on the specific context of the Multilinks project. One key data source for analy-

sis within the Multilinks project was the first wave of the Generations and Gender Survey (GGS). The first round of this survey was carried out in 2004. We thus chose 2004 as our initial reference year in order to have information on the institutional context from around the same time that the GGS data were collected. The database has been updated up to 2009, which is the most recent reference year for which information is available for the large majority of indicators. Our intention is to systematically provide regular updates to the indicators. Information for the indicators was collected through multiple sources, which were cross-checked: comparative data archives, national sources and individual country informants.

Table 2

Indicators for the policy areas of maternity leave and parental leave

Subtheme	Indicators
Maternity leave	Eligibility conditions for maternity leave
	Duration of maternity leave
	Maternity benefit: Level of compensation
Parental leave	Eligibility conditions for parental leave
	Duration of net parental leave
	Parental leave benefit available?
	Parental leave benefit: Length of payment
	Parental leave benefit: Level of compensation
Childbirth and child-rearing allowances	Eligibility conditions for child-rearing allowance
	Child-rearing allowance: Length of payment
	Child-rearing allowance: Level of compensation
	Childbirth grant available?
	Amount granted
Leave dedicated to fathers	Eligibility conditions for paternity leave
	Duration of paternity leave
	Paternity leave: Level of compensation
	Leave-quota reserved for the father
Comparative leave indicators	Effective parental leave
	Length of well-paid leave

With regard to the selection of countries, the Multilinks project focuses on the 27 European member states. The Generations and Gender Survey tracks fewer EU countries, but includes three non-EU countries in Europe: Georgia,

Norway and Russia. We therefore collected indicators on these countries as well, although the comparability of data from Georgia and Russia is limited due to less reliable data sources, as well as considerable regional policy variation in Russia in particular.

3. Database Access and Services

The data are provided free of charge, but users must register in order to work with the database. The indicators are accessed by choosing among specific policy areas, such as maternity leave or pension net replacement rates. Each subtheme encompasses a portfolio of indicators. A search screen allows the user to select specific indicators, reference years or countries in order to tailor the data table to the user's preferences. The data table is structured into three parts. Information on the policy area, the indicator's name, the unit of measurement and the reference year are provided at the top of the table. In the middle section of the table the data are displayed for the selected countries, indicators and reference years. At the bottom of the table the definitions of the selected indicators and the abbreviated references of the data sources are provided. Complete references are documented in the accompanying methodological report (see section "Documentation"). It is possible to export the generated table as a Character Separated Value (CSV) file.

3.1 Documentation

Comprehensive documentation of the conceptual approach, of the original data sources and of the measurement and comparability problems is an essential part of high-quality data collection. The Multilinks database provides three documentary reports:

1. The *conceptual report* outlines the theoretical framework behind the development of the database. It discusses the different ways in which the state shapes family responsibilities between generations, building on the trichotomy of unsupported familialism, supported familialism and defamilialisation.

2. The *methodological report* provides detailed documentation on each indicator. Collecting comparative indicators is a challenging task: concepts and definitions vary from country to country; indicators do not always refer to the same unit of measurement or point in time; and different data sources often offer different, sometimes even contradictory, figures. The methodological report addresses all of these issues and explains the solutions adopted in each case.

3. The *follow-up methodological report* documents all changes made to the data since the database was first published. By ensuring that changes made to the database over time are transparent and traceable.

In addition to these reports, the generated tables provide commentary on indicator- and country-specific features, calculation formulas, and country-specific deviations from the general definition for an indicator. Comments are indicated by symbols in the table (see figure 1). If the mouse pointer moves over the symbol, a window pops up and shows the content of the comment, thus giving direct access to the commentary.

3.2 Datasets for Statistical Analysis

All numerical and categorical indicators are compiled into a data set for statistical analysis. Data files are provided in the SPSS and STATA formats as well as in a Character Separated Value (CSV) file. There are four different country identifiers, which allows the user to easily merge the indicator data file with other country-specific data sources, such as microdata surveys.

The accompanying *codebook* provides a brief description of all variables. What is the range of values? What are the labels of the categories? Which countries are missing for an indicator? The codebook is the starting point for exploring the data set. In any case, the methodological report and the country-specific comments in the database should be consulted before using indicators as analytic variables.

3.3 Multilinks "Insight" Articles

To facilitate use of the data set, we have initiated a Multilinks "Insight" series. This series builds on our expertise in collecting and harmonising cross-national policy data. The objective of these brief articles is to address the conceptual and methodological problems posed when using specific indicators; in them we also compare the solutions offered by the Multilinks database with those offered by other comparative sources. Multilinks "Insight" will point to critical issues that arise when dealing with comparative policy data and will provide suggestions to overcome limitations.

The first Multilinks "Insight" article (Keck / Saraceno, 2011), for example, addresses the problems arising from the decision of Eurostat to use the European Union Statistics on Income and Living Conditions (EU-SILC) as the data source for monitoring the degree to which countries approach the targets for childcare coverage set at the Barcelona Summit. Based on an analysis of the data, the article argues, first, that EU-SILC data are neither adequate for assessing public policy efforts nor adequate for cross-country comparisons. Second, from a policy point of view, both childcare costs to families and childcare quality should be part of the monitoring exercise. Third, childcare statistics should account for regional variation within countries, for in a number of countries (e.g. Germany and Italy) this variation is quite large, so that national averages say very little.

4. Key Findings: Are there
Intergenerational Regimes in Europe?

The Multilinks database was released in September 2011. Up to now, there-fore, only a few publications – all from the Multilinks research group – have applied indicators from the Multilinks database (see http://multilinks-database. wzb.eu/info/list_of_publications). Saraceno / Keck (2010) examined whether it is possible to cluster countries according to the trichotomy of unsupported familialism, supported familialism and defamilialisation. Using a broad set of indicators in four policy fields, they found that very few countries show a simi-lar approach in both downward and upward intergenerational obligations and with respect to caregiving and financial support. All of the countries exhibit different mixtures of all three approaches. The only clear cluster comprises the Scandinavian countries and France. This cluster is characterised by a high de-gree of defamilialisation with regard to both sets of obligations, but also, in the case of young children, by supported familialism. Belgium shares similarities with this group, but here supported familialism with respect to children is skewed towards financial support rather than parental leave. An opposite group of countries is characterised by a high degree of familialism by default with regard to both obligations. This group comprises Poland, Italy, Spain, Greece and Bulgaria. Latvia and Slovakia come close to fitting this profile, but they are more generous in one or another dimension. The remaining countries rank between these two polar groups, providing a heterogeneous policy mix in the different policy fields under study. The absence of an overarching intra-country policy approach in most of the countries is not surprising, for at least two rea-sons. First, children and elderly people have different legal and social statuses. Individualisation of entitlements is greater for the latter than for the former. Second, different policy instruments often originate from different policy set-tings introduced or reformed at different times, that is, from different social and political contexts, and depend on different institutional actors (Kasza, 2002).

In another article, Saraceno / Keck (2010) exploit the data base to develop a conceptual framework for analyzing the degree of gender equity by public social policies. Daatland / Herlofson / Lima (2011) explore the relationship be-tween family norms and social policies arrangements.

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