Welfare regimes, leave policies and work-life reconciliations in Northern, Eastern and Southern Europe: Typologies, welfare services, benefits and statistics on long-term developments

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1. Introduction

This report focuses on welfare regimes, family policies and work-life reconciliation in Norwegian, Polish and Italian welfare states. In the research literature on welfare states, these countries, belonging to Northern, Eastern and Southern Europe, represent three different welfare regimes. The comparative approach this report is based on is well suited to explore diversity, particularly helpful for identifying general patterns and relationships. Furthermore, as Ragin and Amoroso (2012: 145) has pointed out, examining diversity (patterns of similarities and differences) goes hand-in-hand with the study of causes. How might different welfare policies affect gender differences in labour market participation? To which extent can differences in the amount of social spending on family and childcare ease gender differences, contributing to gender inequality and a more productive labour market? Can welfare policies affect fertility rates, if so, in what way? Furthermore, how does different historical trajectories (i.e. ‘path-dependency’) and cultural contexts affect differences in welfare design and gender equality? Indeed, these research questions are complex. However, social research based on a comparative approach can give us a clearer picture of how different welfare policies might yield different results. In this regard, the focus on Norway, Poland and Italy is interesting, since they represent three quite different – but at the same time similar in some ways (e.g. Barnini 2015) – political-economic and cultural contexts. For instance, the comparison of family policies in the Norwegian welfare state with the Polish and Italian welfare state, might show some clear difference which again might be linked to different welfare results. Furthermore, at a cultural level, Poland and Italy is mainly Catholic countries while Norway is by far mainly Protestant. This difference might be highly relevant for the understanding of differences in the welfare states covered in this report. As Emmenegger (2010) has pointed out, this thesis is “one of the most widely cited explanations for low female employment rates”. In brief, Esping-Andersens social Catholicism thesis argues that Catholics exhibit more conservative family values, i.e. there is stronger support for the male breadwinner model in countries that are mainly catholic compared to other countries. This is presented as important determinants of gender differences in the labour market and low female employment rates (Emmenegger 2010). This has been given empirical support by studies by Algan and Cahuc (2006, 2007), for instance by showing that more Catholics than Protestans agree with statements such as ‘When jobs are scarce, men should have more right to a job than women’ and ‘Family life suffers when women work’. However, Emmenegger’s (2010) study shows that Catholics support more conservative family models, but “so do Reformed Protestants and religious persons in general”. Thus, his analysis
refutes Esping-Andersen’s thesis. These studies shows that there exists controversies about explanations for differences in welfare policies and gender and family attitudes.

The goal of this report is to elucidate similarities and diversity in the Norwegian, Polish and Italian welfare state. The report specifically focuses on broad differences in welfare regimes (and how each welfare state relate to idealypical regimes), differences in family policies and work-life reconciliation, especially emphasising childcare and leave policies. The report also includes an overview over statistical long-term trends in social indicators such as demographics, employment, social spending on family and childcare, etc.

Writing in the context of the research project POLFAMIGRA which addresses migration flows, recent economic, political and social challenges facing Europe will be taken into consideration. At a general level, renown figures in social science has argued that Europe is currently challenged by several structural (and institutional) challenges contributing to social problems. Furthermore, Southern Europe in particular has been hard-hit by political-economic developments after the financial crisis of 2007/2008. Long-term austerity policies – and implementation of austerity in recessions – has to a large extent been refuted as effective measures by several economists (Krugman 2013, Piketty 2014, Perez and Rhodes 2015). Nevertheless, it is still the dominating policy response to crisis-ridden countries. In this respect, the ongoing Eurozone crisis has shown growing conflict and divergence between core-periphery countries, creditors and debtors (see e.g. Beck 2013, Dølvik and Martin 2015, Habermas 2015, Offe 2015; see also Blyth 2013, Streeck 2014). These aspects further shows how including Southern Europe in this comparative overview, might further elucidate important characteristics of welfare states in Europe today. The social consequences of the ongoing crisis is going to have lasting effects, and by migration, these developments also affects the Norwegian welfare state which has not, to a large extent, been hit by economic repurcussions of the financial crisis (Harsløf and Ulmestig 2013, Harsløf et al. 2013). As Kvist (2013) has noted,

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1 ‘Ideal-typical’ in the Weberian sense, refering to a method of “gathering a rich and chaotic world within a conceptual understanding in a way that combines sociological theory with an historical understanding …” (Korsnes 2008: 118, own translation).
2 Perez and Rhodes has for instance argued that implementation of reforms addressing dualization in the labour market – lowering the level of protection for long-term employees in midst of austerity, “has, for now, resulted in more employment shedding than employment creation, creating a vicious circle of rising unemployment, lower tax revenues, renewed recession, and a large rise in both countries’ [Italy and Spain] public debt” (2015: 212). As of 15.07.2015, Italy has the second-largest amount of government debt in Europe (Banca d’Italia 2015).
“The crisis will be felt in years to come with reduced life-income for younger cohorts, lower fertility laying the ground for intergenerational conflicts, and migration of skilled youth implying returns of social investments made in southern parts of Europe benefiting northern parts.”

The research literature on migrations flows of east-west (especially after the EU enlargement of 2004 and 2007), has in recent years been paralleled with increased interest of south-north migration (Favell 2008, Nowak and Nowosielski 2011, Bygnes 2015). The sociologists Nowak and Nowosielski has pointed out that a part of the explanation for recent migrations flows can, on one hand, be related to “[p]erceived inequalities, such as the lack of a proper job or bad living conditions, [that] can play the role of push factors that make people migrate” (2011: 1). On the other hand, welfare arrangements and job opportunities can also play the role of pull factors. This report will, by focusing on diversity, include both potential push and pull factors. However, it’s important to take into consideration, as Nowak and Nowosielski notes, that “‘structural conditions’ are only part of the story of migration … it is important to remember that not only ‘objective’ social differences and the inequalities caused by them foster migration behaviour, but so do their social perceptions” (ibid.: 8).

Welfare state policies might be both important push and pull factors for migration. In this respect, family policies is of specific importance as challenges relating to work-family reconciliation has accentuated and become an important area to address for social policy. As the political scientist Taylor-Gooby has argued, balancing work and family has become a new social risk facing European welfare states (2004: 15-17). In this respect, child and family policies has increased in importance. Olk (2012: 3) has pointed out that children and families only played a marginal role in welfare politics until recently. One of the main goals with social policy development in this respect, has been to increase womens labour market participation. At at general level, the male breadwinner and female homemaker is in decline everywhere (Taylor-Gooby 2004: 17). However, this does not imply that there still exists important differences between welfare states. The profound shift in social policy emphasising children and families, is also, as Olk (2012) argues “due to increased expectations of the economy in regard to the skill level of workers”. Thus, “many countries have focused on a reform of the educational system and a modernisation of the system of early childcare and education”. This shift is often described as a move towards a ‘social investment’ paradigm in welfare policies (for an extensive overview over social investment literature, see Morel, Palier and Palme 2012).
As Olk (2012) further notes, the shift in political priorities in developed welfare states is usually explained in terms of changing economic, social and political conditions. However, Olk takes a critical stance toward ‘social investment’ as a homogenous approach to socio-economic changes in developed welfare states. The argument in its context is as follows:

“[a]ccording to this line of thinking new challenges like the aging of populations, falling fertility rates, and changing structure of families not to mention the coming of the knowledge-based society automatically cause the development of a new political strategy concerning children and families. If this view were correct, then all countries would have to react more or less in the same manner to the global challenges. However, as recent history has shown this is not the case. Confronted with the same challenges some countries develop new political programmes and priorities whereas others do not. Furthermore, the analysis of the OECD Social Expenditure database (SOCX) comes to the conclusion, that there are changing family policy goals focusing on such things as reconciling work and family responsibilities, providing incentives to work, and enhancing the development of young children by means of early childhood care and education programmes. However, there is a substantial variation in the commitment to these new goals by the countries studied. This provokes the question as to ‘why some countries have placed children higher on their political agenda than others, and why some countries have managed to increase or sustain more generous policies while others have not’.”

Thus, even though some of the challenges for welfare states might be the same, it does not imply that the responses will be similar. In a study of how countries promote social investment through work-family policies, the political scientist Morgan (2013: 153) characterizes Norway, Sweden and France as social investment ‘pioneers’, Germany, UK and the Netherlands as recent ‘path-shifters’, and Italy, Spain and Austria as ‘slow movers’.

The three ‘worlds of welfare’ covered in this report have different institutional design and cultural contexts, implicating various approaches to challenges and future-oriented policies. To paint a general picture, that later will be elaborated, the Norwegian, Polish and Italian welfare regime are usually included in the Nordic (‘Social-democratic’), Continental (‘Conservative’) and Mediterranean welfare regimes. However, as will become apparent below, the placement

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3 By social investment Morgan means work-life reconciliation with high quality childhood education and care, promotion of womens’ labour market skills by enabling work force-participation, as well as promotion of gender equality; a ‘gender awareness’ departing from the “gender blind understandings of the welfare state held by many Keynesian and neo-liberal thinkers in the past” (2013: 153-155).
of the Polish and Italian welfare state in regime typologies is more controversial and ambiguous than the Norwegian welfare state.

As Esping-Andersen has pointed out in the *The Social Foundations of Postindustrial Economies* (1999), post-industrial societies is challenged by functional problems in the labour market and the family. Both the labour market and the family is not functioning optimal, because they are in the midst of revolutionizing changes. The labour market functions is “seemingly incapable of furnishing full employment and equality at the same time”, while the family, “once the nucleus of social integration is now unstable and, in many countries, seemingly on a fertility strike” (1999: 1). Furthermore, the changes regarding the family is important to address, as the family is fundamental for the working of society. As Esping-Andersen (1999: 47) argues,

> “The ‘family’ is a societal institution, the bedrock of society, but it is also an actor, a decision-maker. As an institution, it systematically patterns peoples’ behaviour, expectations, and incentives. Parallel to the state and the market, it is part of an integrated regulatory infrastructure that defines what is rational and desirable, that facilitates normative compliance and social integration. As an institution, the family forms part of the ‘cement of society’, to borrow a phrase from Elster (1989)”

Esping-Andersen further argues that what one family chooses to do might not have a large impact on society, but “if a huge numbers of families line up behind a certain behaviour they may very well create institutional change, indeed social revolution”. In this respect, the move towards dual-earner households as the new norm entails that the family as an institution has changed, and so has society (ibid.). As the political scientist Taylor-Gooby states, based on comparative data: “[t]he proportion of dual earner households is rising across Europe, as part of the shift towards a post-industrial society, and accounts for at least 60 per cent of all couple households supported through work everywhere except in Greece, Italy and Ireland, where it exceeds 45 per cent” (2004: 17). This development entails important implications for the family, at the same time it poses new challenges for welfare state policies. One of the most important new challenges is work-family reconciliation. Taylor-Gooby has pointed out that “[m]ore recent analysis point to the increasing recognition of women as workers in a number of welfare states, but indicate that social provision is in most cases ill-adapted to support

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4 Esping-Andersen argues that he uses the label ‘post’ in lack of a more descriptive label.

5 Esping-Andersen has shown how the move toward dual-earner households also entail a source of rising inequalities as partners with similar socioeconomic status gather at both the top and the bottom of the societal pyramid (1999; see also Esping-Andersen 2009).
mothers who also participate actively in paid work” (2004: 15). Indeed, there are important
differences between welfare states in their response to, as well as their success in combating,
the new challenges arising from recent socioeconomic developments. As the political scientist
Lewis has argued, there are large differences especially regarding adaptation to women’s role as
mothers and workers:

“[b]roadly speaking, states have tended to recognize women for the purpose of social
benefits either as mothers or as workers. In a rare case like France, both … have been
recognized. In Sweden in the late twentieth century, recognition as mothers have been
grafted onto recognition as workers. Where the male breadwinner model still has major
purchase, then women find that their position as paid workers is at best a matter of
secondary concern (Britain and Germany) and at worst actively discouraged (Italy)”
(Lewis 1998: 15).

In a comparative overview, Taylor-Gooby shows how women’s engagement in the work force
is limited to a very small extent by motherhood in Nordic countries, but has much larger impact
in the corporatist, liberal, and particularly Mediterranean context (2004: 17-18). In the welfare
literature in recent years, work-family reconciliation has been presented as one of multiple “new
social risks” that poses a challenge to welfare regimes (see e.g. Taylor-Gooby 2004; Ulmestig
and Rickard 2013). In this context, Scandinavian welfare states are often presented as “best in
class” with universal services and extensive benefits.6

The structure of this report is as follows. The report starts with a brief overview over regime
typologies and some comparative data on Norway, Poland and Italy. Then the report moves on
to present each welfare state, starting with the Norway, followed by Poland and then Italy. The
presentation of each welfare state will be quite similar, starting with general characteristics and
research regarding the placement of the welfare state in welfare regimes. This is followed by
an overview over characteristics of family and gender related welfare policies (including
childcare and work-life reconciliation). Furthermore, an extensive overview over leave policies
is included for each chapter. Statistics on long-term developments in the different welfare states
is presented in chapter 6.

6 However, there has also been empirical studies contesting positive effects of universal welfare design, e.g.
«Money for nothing? Universal Child Care and Maternal Employment» by the economists Tarjei Havnes and
Magne Mostad (2011).
2. Welfare regimes

This report will discuss different welfare regimes and see how the Norwegian, Polish and Italian welfare state suits regime typologies. The Journal of European Social Policy recently devoted a special issue to the 25th anniversary of Esping-Andersen’s The Three Worlds of Welfare Capitalism (1990). In this issue, Emmenegger, Kvist, Marx and Petersen argue (2015) that “Three Worlds continues to be the point of reference for comparative welfare state research”. Furthermore, they conclude that “Three Worlds has become a classic that is likely to continue to have a major influence on welfare state research in its next 25 years”. However, they also state that Three Worlds have obtained a “paradigmatic status” and “that its claims and findings are often taken for granted rather than challenged”. A lot of work has been done on welfare states and regimes since this publication, and Esping-Andersen’s perspectives has developed as well, especially toward including critiques from feminist scholars and a stronger emphasis on demographics.7

In Three Worlds Esping-Andersen showed how welfare states in advanced western nation-states clustered into three different welfare regimes. Esping-Andersen says that there basically is to approaches to the study of welfare states. On the one hand there is the narrow approach, emphasizing the welfare state “in terms of the traditional terrain of social amelioration: income transfers and social services, with perhaps some token mention of the housing question”. On the other hand, there is the broad approach, which “often frames its questions in terms of political economy, its interests focused on the state’s larger role in managing and organizing the economy. In the broader view, therefore, issues of employment, wages, and overall macro-economic steering are considered integral components in the welfare-state complex. In a sense, this approach identifies its subject matter as the ‘Keynesian welfare state’ or, if you like, ‘welfare capitalism’” (1990: 2). Esping-Andersens follows the latter approach.

The concept of ‘welfare-state regimes’ is essential for Esping-Andersens study. According to Esping-Andersen “the concept of the welfare state is too narrowly associated with the conventional social-amelioration policies” (ibid.). By deployed the concept of welfare regime, Esping-Andersen wants to show how countries cluster into different regimes expressed by social-welfare policies and their influence on employment and the general social structure. Thus, the concept of a welfare regime is broader than the concept of welfare states, and is

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7 See The Incomplete Revolution (2009) and The Fertility Gap in Europe (2014). Arts and Gelissen (2002) have for instance pointed at that two major critisisms against Esping-Andersen is (1) the presentation of “Mediterranean welfare states as immature Continental ones”, and (2) “a neglect of the gender-dimension in social policy”.

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deployed to “… denote the fact that in the relation between state and the economy a complex of legal and organizational features are systematically interwoven” (ibid.).

The welfare regimes in *Three Worlds* differ, among other things, by what Esping-Andersen conceptualizes as ‘de-commodification’; protection from the market based on the notion of social rights. In *Social Foundations*, Esping-Andersen also introduces and discusses the concept of ‘de-familization’ which captures policies that “lessen individuals’ reliance on the family; that maximize individuals’ command of economic resources independently of familial or conjugal reciprocities” (1999: 45). Both the concept of de-commodification and de-familization should be understood as a matter of degree rather than of an ‘either-or’ (ibid.).

Esping-Andersen categorizes welfare states into ‘liberal, ‘conservative’ and ‘social-democratic’ welfare regimes. However, he emphasises that “we must recognize that there is no single pure case” (1990: 28). In the following, this report will explore how the Norwegian, Polish and Italian welfare state harmonize with welfare regime typologies.8

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8 For a study of welfare attitudes and regimes, see Jacobsen (2010). Jacobsen’s study lends some support to Esping-Andersen’s regime argument.
To give an overview over the welfare states this report covers before moving on to the presentation of the single cases, some key statistics is included in table 1 (all presented measures are elaborated in footnotes).

**Table 1 - Comparative overview over Norway, Poland and Italy**

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<td>62.858</td>
<td>25.8</td>
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<td>40</td>
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<tr>
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<td>1.3</td>
<td>22.143</td>
<td>32.7</td>
<td>26</td>
<td>22</td>
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<tr>
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<td>1.4</td>
<td>33.668</td>
<td>36.0</td>
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9 Based on Leavenetwork’s background data for countries, 2015 (http://www.leavenetwork.org/fileadmin/Leavenetwork/overviews_2015/final.Background_data_on_countries.pdf)

10 Gender inequality index is «a composite measure developed by United Nations Development Programme to reflect inequality in achievements between men and women in three dimensions: reproductive health, empowerment and labour market.» Health is measured by maternal mortality ratio and adolescent fertility rate. Empowerment is measured by share of parliamentary seats held by each sex and by secondary and higher education attainment levels. Labour is measured by women’s participation in the work force. The figures in the table is a country’s ranking in the Index in relation to all other countries in the world. Countries are ranked from 1 (meaning low inequality) to 100 (meaning high inequality).

11 i.e. «employment among women with pre-school children».


13 Data refer to the most recent year available during the period specified. The Gini coefficient rank countries according to inequality; a value of 0 represents absolute equality, a value of 100 absolute inequality.
3. Northern Europe – Norway

The Norwegian welfare state is often placed within Esping-Andersens social democratic welfare regime. Esping-Andersen has described Scandinavian welfare states as social democratic because social democracy has been the dominant force behind social reform. Furthermore, “[r]ather than tolerate a dualism between state and market, between working class and middle class, the social democrats pursued a welfare state that would promote equality of the highest standards, not an equality of minimal needs as was pursued elsewhere” (Esping-Andersen 1990: 27). Furthermore, the formula in the social democratic regime has,

“ … translated into a mix of highly de-commodifying and universalistic programs that, nonetheless, are tailored to differentiated expectations. Thus, manual workers come to enjoy rights identical to those of salaried white-collar employees or civil servants; all strata are incorporated under one universal insurance system, yet benefits are graduated according to accustomed earnings. This model crowds out the market, and consequently constructs and essentially universal solidarity in favour of the welfare state. All benefit; all are dependent; and all will presumably feel obliged to pay.”

This model does not follow the same principle as the corporatist-subsidiarity model, which waits “until the family’s capacity to aid is exhausted, but to preemptively socialize the costs of family-hood. The ideal is not to maximize dependence on the family, but capacities for individual independence. In this sense, the model is a peculiar fusion of liberalism and socialism.” This results in a welfare state that “grants transfers directly to children, and takes direct responsibility of caring of children, the aged, and the helpless. It is, accordingly, committed to a heavy social-service burden, not only to service family needs but also to allow women to choose work rather than the household” (ibid.: 27-28).

Thus, the Norwegian welfare state can be understood within a Scandinavian or Nordic welfare model. Certainly, this does not imply that the Nordic welfare model is a homogenous group. They can rather, as the political scientists Hippe and Berge points out, be understood as a “family of Nordic welfare models with similarities and differences, rather than one model” (2013: 13, own translation). To expand on Esping-Andersens regime typology, the Norwegian welfare state (as well as Nordic welfare states) can be characterized as being small open economies with a well-organized and well-regulated labour market, active welfare policies, universal welfare benefits, a national and coordinated wage bargaining system, a relatively high degree of economic and social equality and generally high living standards (Kildal and Kuhnle 2005; Kvist et al. 2012; Hippe and Berge 2013). There are, at least, two important
characteristics separating the Norwegian welfare state from other Nordic welfare states: 1) Oil revenues. 2) Over the last two decades, Norway has generally resisted international recommendations to flexibilise and de-regulate the labour market. Furthermore, and to a less extent unique compared to other Nordic welfare states, the Norwegian labour market ranks among the most knowledge-intensive in Europe (Harsløf et al. 2013: 30-31). Simultaneously, an OECD report (2008) has estimated that the Norwegian labour market has the smallest share of low-skill jobs in the entire OECD. Thus, there is significant competition for low-skills jobs (Hammer and Hyggen 2013).

The Norwegian welfare model has been described as women-/family-friendly (Esping-Andersen 1999: 45). This characteristic is not particularly novel for Nordic welfare states. Based on comparative data, Taylor-Gooby (2004: 15) notes that “the inclusive Nordic citizenship welfare states committed substantially more than any other group of European countries to care services for children and older people between 1980 and 1999, spending roughly three times the EU average on elder care and twice as much on family services”. In this period there has been a large expansion of kindergartens and the public sector in Norway. Hatland (2011a: 152) argues that the welfare state has become an “employment machine” for women: In 2009, 490 000 were employed in health- and care services in Norway, 82 per cent were women. This is part of a larger societal transformation, where earlier non-waged labour for women in the family has become public sector jobs. Norway (and Scandinavia) generally spend more on children and families compared to many other welfare states. According to Eurostat data on spending on benefits as percentage of GDP in 2008 (Hatland 2011b: 276), Norway (12.6), Sweden (10.4) and Denmark (13.2) spends far more on children and families compared to Poland (4), Spain (6.8) and UK (7.3). However, as Hatland points out, a relevant dimension to take into consideration might be that the economic challenges of the welfare states compared differ (ibid.). As childcare and family benefits in Norway and Poland have been covered in the POLFAMIGRA report 1/2015, information about distinctive features will not be elaborated here. However, work-life reconciliation deserves some further elaboration.

Even though Norway is among the countries that often is characterized as women-/family-friendly, gender differences still exists. As The Norwegian Labour Inspection Authority (Arbeidstilsynet) has pointed out, women often work more outside regular day-time compared

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14 10 per cent of the national budgets income sources are returns from the Norwegian Oil Fund (Hippe and Berge 2013)
15 The largest share of expenditures is generally directed at health and pensions.
to men. As of 2007, this regards 32 per cent of women over 24 years, against 26 per cent of male workers in the same age group. This is seen in relation to the fact that part-time employed women most often works shifts, rotation, weekend and night-time. 40 per cent of women work part-time, and in the health- and care sector, 45 per cent work rotation (Arbeidstilsynet 2007: 30). The largest amount of work outside regular day-time is within the hotel and restaurant sector. According to data from Statistics Norway (Statistisk Sentralbyrå) on part-time work for men and women between 15-74 years, gender-differences has been apparent and more or less permanent in the time period from 1996 to 2014. While 10.6 per cent men and 15.0 per cent women worked part-time in 1996, 6.1 per cent men and 9.6 per cent women worked part-time in 2014 – so, according to these statistics, there has been a slight decline in gender differences in part-time work over the last two decades (Statistics Norway 2015).

Family policy

In the following, leave policies in the Norwegian welfare state will be described. The information on leave information is to a large extent reproduced based on Brandth and Kvandt’s (2013) overview over leave policies in the Leave Network yearly review of 2013. In this report, information on leave policies for Norway, Poland and Italy is from the International Review of Leave Policies and Research (Moss 2013). The structure of the presentation of leave policies in Norway is as follows: First maternity and paternity leave policies will be presented, thereafter information on the relationship between leave policy and early childhood education and care policy will be presented. After this, information on take-up of leave will be presented. Lastly, references to relevant publications and ongoing research will be presented. This presentation structure is more or less the same for leave policies in Poland and Italy as well.

Leave Policies

1. Current leave and other employment-related policies to support parents

Maternity leave (svangerskapspermisjon and fødselspermisjon)

Length of leave

- Nine weeks before the birth and six weeks following birth.

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16 The Leave Network review has extensive overviews over leave policies in many countries. See the literature list for reference to Leave Networks report (Moss 2013).
Payment and funding

- Hundred or 80 per cent of earnings.
- Funded from general taxation.

Flexibility in use

- None. If the baby is born before the estimated delivery date (e.g. so that the mother only used two of her three weeks pre-birth leave), the remaining time cannot be transferred to after the birth and is therefore lost.

Eligibility (e.g. related to employment or family circumstances)

- All women employed for six of the last ten months prior to delivery are eligible for leave and who have earned at least half the basic national insurance benefit payment over the previous year. Non-employed women receive a one-off payment of NOK35,263 (€4,673160).

Variation in leave due to child or family reasons (e.g. multiple or premature births; poor health or disability of child or mother; lone parent) or delegation of leave to person other than the mother

- If the mother or child is ill and hospitalised after delivery, leave payment can be postponed.

b. Paternity leave (commonly known as pappapermisjon) (responsibility of the Ministry of Labour)

Length of leave (before and after birth)

- Two weeks after birth – ‘daddy days’ (+ twelve weeks = father’s quota, see 1c).

Payment

- ‘Daddy days’ are unpaid by government; payment depends on individual or collective agreements and most fathers are covered by such agreements.

Flexibility in use

- None.

Eligibility (e.g. related to employment or family circumstances)

- All employed fathers have the right to leave, but payment is negotiated and paid by the employer.
Variation in leave due to child or family reasons (e.g. multiple or premature births; poor health or disability of child or mother; lone parent) or delegation of leave to person other than the father.

- Leave can be transferred to someone else if the father does not live with the mother, since the purpose of the leave is to assist the mother.

c. Parental leave (Foreldrepengeperioden) (responsibility of the Ministry of Children, Equality and Social Inclusion)

Length of leave (before and after birth)

- Forty-seven or 57 weeks depending on payment level (see ‘payment and funding’ below). Of these, nine weeks are for mothers, three before birth and six after (included in 1a above, under Maternity leave), and twelve weeks are for fathers (fedrekvoten or ‘father’s quota’). The remaining 26 or 36 weeks is a family entitlement and may be taken by either mother or father. See ‘flexibility’ below for options available to parents.

Payment and funding

- Parental money may either be taken for 47 weeks at 100 per cent of earnings or for 57 weeks at 80 per cent of earnings, up to a ceiling of six times the basic national insurance benefit payment (i.e. NOK 492,732 a year, €65,302).
- Non-employed women receive a flat-rate payment of NOK35,263 (€4,673).
- Funded from general taxation.

Flexibility in use

- For the family entitlement part of leave, it is possible to choose a longer period of leave (36 weeks) paid at 80 per cent of earnings, or a shorter (26 weeks) paid at 100 per cent.
- After the first six weeks, it is possible to postpone parts of the parental money period, as long as it is taken during the first three years after birth and the parent receiving the money is employed full time during the postponement period. Hospitalisation and vacation may also qualify for postponement.
- After the first six weeks, it is also possible for one or both parents to combine all or part of the parental money period with part-time work; if parents take less than full benefit payment, this will prolong the period of parental money. If both parents choose to combine parental
money with part-time work, for instance each working half-time, this will result in a longer period. A written agreement from the employer is demanded in both cases. There is also a requirement that the mother has returned to employment or study for the father to take leave.

- Father’s quota: this period of leave (twelve weeks) is not transferable to the mother, except in certain circumstances, e.g. if the father is ill or otherwise unable to care for the child or if the mother and father do not live together.

- Father’s quota: this may not be taken in the first six weeks of the parental money period, except for multiple births or adoption. Otherwise, fathers are free to choose at what time during the period to use it and whether to take the quota as part-time leave, also whether to split it or use it in one block. Flexible use requires agreement with the employer.

- The family entitlement part may also be taken as one block of time or split into shorter blocks of time.

*Eligibility (e.g. related to employment or family circumstances)*

- The eligibility rules are the same for fathers and mothers. They must be employed for six of the last ten months prior to birth and earn at least half the basic national insurance benefit payment over the previous year.

- The eligibility rules for the father’s quota and the shared parental money period are somewhat different:

- The father can use the 26/36 weeks of paid leave even if the mother is not eligible; but the mother is required to take up work (at least 75 per cent of full-time hours) or study on a full-time basis. For the father’s quota, there is no requirement that mothers go back to work, but the mother must have been employed for six of the last ten months prior to birth.

*Variation in leave due to child or family reasons (e.g. multiple or premature births; poor health or disability of child or mother; lone parent); or delegation of leave to person other than the parents*

- Family entitlement: when more than one child is born, parental money is increased by seven weeks for each child (with 80 per cent pay) or five weeks with 100 per cent pay. If the child dies during the Parental leave period, parents will receive payment for six weeks of the period that is left.
d. Childcare leave or career breaks
- Each parent has the right to one year of unpaid leave after the parental money period.
- Parents with a child aged 12-36 months are entitled to receive a cash benefit (‘cash-for-care’ scheme) on condition they do not use publicly funded ECEC service. The full benefit is NOK5,000 (€663) per month for a child aged 12-18 months, and NOK3,303 (€438) for a child aged 18-23 months. Children who use ECEC on a part-time basis receive a reduced benefit (e.g. if parents use no place, they receive 100 per cent of the benefit; if they use a place for 17-24 hours a week they receive 40 per cent of the full benefit). The main criterion for eligibility, therefore, is not parental employment status, but parents not using a particular service.

e. Other employment-related measures
Adoption leave and pay
- The same regulations as for parents having their own children, except for the nine weeks of Maternity leave. The whole period, with the exception of the father’s quota, may be taken by either parent. In addition, parents adopting children from abroad receive a cash benefit of NOK35,263 (€4,673).

Time off for the care of dependants
- Each parent of a child under 12 years has a right to ten days leave per child per year when children are sick, or 15 if they have more than two children. Single parents have the right to 20/30 days a year. For severely or chronically sick children, there are extended rights to leave until the child is 18 years old. Leave is paid by the employer at the same rate as sickness benefit.

Flexible working
- The Work Environment Act grants breastfeeding mothers the right of breastfeeding breaks of up to one hour per day, without payment. But collective agreements ensure pay in many sectors.
- Parents have a right to part-time work to care for children until children are ten years old. This is unpaid.

2. Relationship between leave policy and early childhood education and care policy
The maximum period of post-natal leave available in Norway is just over three years, but about two years of this is unpaid; leave paid at a high rate runs for 13 months. There is an entitlement
to ECEC from one year of age, supposed to be available on a full-time basis at kindergartens. So there is no gap between the end of leave and an ECEC entitlement in theory. However, a child must be born before September 1, to be guaranteed a place in the autumn (start of the school year). Levels of attendance at formal services for children under and over three years are above the average for the countries included in this review and for OECD countries. For actual attendance levels, see ‘relationship between leave and ECEC entitlements’ on cross-country comparisons page.

3. Changes in policy since April 2012 (including proposals currently under discussion)

From 1st July 2013 the Parental money period will be extended to 49/59 weeks with 100/80 per cent of earnings. At the same time, the mother’s quota will be extended to 14 weeks and as will the father’s quota, while the shared period will be reduced to 18/28 weeks. The rationale for this change in Parental leave design is to achieve more equal rights between mothers and fathers, the Icelandic tripartite model being a source of inspiration.

On 1st August 2012 the ‘cash-for-care’ scheme was revised. Parents with a child aged 12 to 24 months are already entitled to receive a cash benefit on condition they do not use publicly funded ECEC service, but the revision increases the amount of the benefit for children under 18 months. The full benefit is now NOK3,303 (€438) per child per month for the oldest children in this group - 19-23 months - and NOK5,000 (€663) for the youngest - 13-18 months.

The government has proposed that women who breastfeed children under one-year-old should have the right to paid leave for one hour a day, to cover employees who do not have paid breastfeeding leave as part of their collective agreement.

The father’s quota is a much debated issue, and there are great differences between the left and the right of the political spectrum. For instance, while the present red/green government has continuously increased the father’s quota in Parental leave, the Conservative Party wants to do away with the father’s quota and make the whole Parental leave period subject to parental sharing and choice.
4. Take-up of leave

a. Maternity leave

Nine out of ten mothers have the right to parental money; the remainder do not meet eligibility conditions. These figures are based on data from public records (Grambo and Myklebø 2009).  

b. Paternity leave

The share of fathers who take time off work around the birth of the child is approximately the same as for the father’s quota (89 per cent). This figure includes fathers taking time off work in various ways, including Paternity leave but also annual leave and other options.

c. Parental leave

In the years prior to the introduction of the father’s quota less than four per cent of fathers took some Parental leave. Only a few years later, the take-up rate was over 70 per cent (representative sample – own research from 1997), and data from recent public records show that 90 per cent of fathers take leave of some length. However, figures based on public records in 2011 show that 18 per cent of the parental leave days were taken by fathers.

With every expansion of the father’s quota fathers increase their uptake the following year. During 2012, 21 per cent of the fathers took exactly 12 weeks (60 working days), compared with only 0.6 per cent in 2011; the ‘father’s quota’ increased from ten to 12 weeks between these two dates. Flexible use is increasing as the father’s quota has been lengthened. In 2012, 21 per cent of eligible fathers took their father’s quota as part-time, combining leave and work.

The sharable parental leave is for the most part taken by mothers and has in practice become a Maternity leave. In 2012, only 15 per cent of fathers took any of this part of Parental leave (i.e. in addition to the father’s quota). Father’s use of this leave is dependent on the mother and her willingness to share: mothers who have invested in education and have strong ties to working life (e.g. work full time and have higher status work) are thus most likely to share. This means that fathers are more likely to take some Parental leave when mothers have a high educational level, high income and work status, and full-time employment.

However, some characteristics of the father are also associated with use of leave. Although class differences are small, the father’s level of education has some influence, particularly on

17 "Moderne familier – tradisjonelle valg. En studie av mors og fars uttak av foreldrepermisjoner. Oslo: Nav".
the length of the leave. The eligible fathers least likely to use the quota are fathers with long working hours, in managerial positions or with a wife who works part time. Moreover, father’s sharing of the Parental leave also depends on his own relationship to work. Fathers must sometimes negotiate with their employers when they want to take more leave than the father’s quota, and the view that Parental leave is really for mothers is to be found among some employers. Fathers therefore may experience their jobs as a hindrance to taking more leave.

5. Research and publications on leave and other employment-related policies since April 2012

a. General overview
There is constant research being undertaken. It is dispersed across many institutions in Norway, including a substantial part that in the form of doctoral or other small-scale studies.

b. Selected publications since April 2012
Brandth, B. (2012) ‘Emotional dimensions of fathering and work-life boundaries’, in: P. McDonald and E. Jeanes (eds.) Men, Wage Work and Family. London: Routledge. This chapter asks what fathers’ use of leave has meant to their working hours and relationship to their jobs. When studied qualitatively, fathers have several strategies of tailoring working hours to better balance work and childcare after having finished their leave. These strategies are not, however, visible in the statistics on working hours.

Ellingsæter, A.L (2012) ‘Ideational struggles over symmetrical parenthood: The Norwegian daddy quota’, Journal of Social Policy, Vol.41, No.4: 695-714. This article examines the reception among political actors in Norway of a proposal in 2008 to divide the existing Parental leave into three equal parts – one for the father, one for the mother and one shared at the discretion of both parents. Three rival ideational policy paradigms are identified: fathers’ right to care and mothers’ right to breastfeed compete among quota protagonists, while ‘choice’ is advocated by quota antagonists. So far, quota protagonists guided by the mothers’ rights paradigm have been the most successful, but persistent, ideational tensions are rendering future developments uncertain.

This book analyses important characteristics of Norwegian families in relation to the welfare state in a contemporary as well as a historical perspective. Topics include men’s provider work, gender division of work in immigrant families, class differences in divorce, family models and use of the various family policies.


This article discusses fathering practices of employees in two globalized knowledge and work organizations.


The cash-for-care scheme was introduced in 1998 in Norway. During the first period after its introduction, the percentage of users was high at 91 per cent. Since 2005, however, the use has decreased substantially year by year. This article analyses more closely ‘the rise and fall of the cash-for-care scheme in Norway, with a focus on the intersection of gender, class, and ethnicity in parents’ use of cash for care over this period. The findings indicate that cash for care is a scheme that mainly encourages mothers who have low income and a low educational level and who are to a large degree from immigrant backgrounds to remain outside the labour market. By distinguishing between three phases, the article also illustrates how the intersection of gender, class, and ethnicity enters in different ways into both the discourse and the practices connected to the cash-for-care scheme since it was introduced in 1998.

**c. Ongoing research**

*New theoretical perspectives on the Nordic model of work-family reconciliations.*

Berit Brandth, Elin Kvande and Sigtona Halrynjo, Norwegian University of Science and Technology (NTNU). (2012-2015)

The objectives of this ongoing study are to develop new theoretically informed understandings and perspectives on the Nordic model of work/family adaptations, to contribute to new empirical knowledge on work/family adaptations through examination of possibilities and dilemmas within three empirical research contexts and to situate the Norwegian model in an international context through international collaboration and a comparative book project.
‘De andre fedrene’ Om farskap og maskulinitet blant minoritetsetniske menn i likestillingslandet. [‘The other fathers’ Fathering and masculinity among minority ethnic men]. Anette Hoel, doctoral study at Norwegian University of Science and Technology (NTNU) (2012-2014).

Balansen mellom jobb og hjem - og fedrekvotens innvirkning på denne, sett i et likestillingsperspektiv [The balance between work and family - the impact of the father’s quota]. Kristine Smeby, doctoral study at Norwegian University of Science and Technology (NTNU). (2012-2014).
4. Eastern Europe – Poland

Linda J. Cook, Professor of political science, points out that there is much dispute whether Central Eastern European\(^{18}\) (CEE) welfare states like Poland can fit into existing typologies, and also were they stand in relation to Europe (2010: 672). According to Cook, CEE welfare states entails elements of both the conservative and the liberal welfare regime typology. However, she argues that CEE is a distinct welfare regime. Hence, in the following some of the basic characteristics of these welfare regime typologies will be presented before moving on to more distinctive traits of the Polish welfare state.

Esping-Andersen (1990) describes liberal welfare regimes\(^{19}\) as characterized by,

“…means-tested assistance, modest universal transfers, or modest social-insurance plans predominate. Benefits cater mainly to a clientele of low-income, usually working-class, state dependents. In this model, the progress of social reform has been severely circumscribed by traditional, liberal work-ethic norms: it is one where the limits of welfare equal the marginal propensity to opt for welfare instead of work. Entitlement rules are therefore strict and often associated with stigma; benefits are typically modest. In turn, the state encourages the market, either passively – by guaranteeing only a minimum – or actively – by subsiding private welfare schemes.”

Furthermore, according to Esping-Andersen, conservative welfare regimes\(^{20}\) are characterized as following:

“In these conservative and strongly ‘corporatist’ welfare states, the liberal obsession with market efficiency and commodification was never preeminent [to the same extent as in the liberal welfare regime] and, as such, the granting of social rights was hardly ever a seriously contested issue. What predominated was the preservation of status differentials; rights, therefore, were attached to class and status. This corporatism was subsumed under a state edifice perfectly ready to displace the market as a provider of welfare; hence, private insurance and occupational fringe benefits play a truly marginal role. On the other hand, the state’s emphasis on upholding status differences means that its redistributive impact is negligible. But the corporatist regimes are also typically shaped by the Church, and hence strongly committed to the preservation of traditional family-hood. Social insurance typically excludes non-working wives, and family benefits encourage motherhood. Day care, and similar family services, are conspicuously

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\(^{18}\) CCE includes Poland, Hungary, the Czech Republic, Slovenia and the three Baltic countries Estonia, Latvia and Lithuania.

\(^{19}\) Archetypical examples of the liberal welfare regimes are USA, Canada and Australia (ibid.: 26-27).

\(^{20}\) Archetypical examples of the conservative welfare regimes are Germany, Italy, France and Austria (ibid.: 27).
underdeveloped; the principle of ‘subsidiarity’ serves to emphasize that the state will only interfere when the family’s capacity to service its members is exhausted”.

Thus, the CEE welfare regime is a peculiar combination of these two welfare regime typologies. According to Cerami (2006) the welfare states in the CEE region, is a fusion of the pre-communist Bismarckian social insurance system, communist characteristics such as universalism, corporatism and egalitarianism, and post-communist features, i.e. market-based schemes.

The welfare states in Eastern Europe has undergone enormous changes during the last twenty years, after four decades of communism. According to the political sociologist Claus Offe, the economic transition in Eastern Europe has been historically novel, with a transition from the “command economy” of state socialism to the market economy of democratic capitalism” (2015: 7). However, as he further notes, this binary code of state and market obscure the post-communist transition, because “[t]he market as the mode of operation of a capitalist economy is, on the one hand, the opposite of the state and its practices; on the other, markets are themselves creatures of state policies and continuously recreated by the latter” (ibid.). Hence, according to Offe, the economic transition in Eastern European states is an empirical challenge to the hegemonic intellectual frame presenting state as coercion and market as freedom.

The move towards communist welfare state retrenchment and market-conforming of the public and private responsibilities for social well-being in the CEE states have involved some countries moving close to existing EU-members, while some have developed into a “desperately disintegrated state”.

According to Cook, there was large initial welfare losses related to the transition from communist to market-based regimes in the CEE region. However, during the 1990s more extensive social policies was implemented related to family benefits, unemployment and pension entitlement. During the 1990s the CCE governments continued their path towards liberalizing and market-oriented changes. This put an end to state monopolies in welfare provision and legalized private medical practices and educational services. Simultaneously, the communist welfare provision which secured universal family benefits were “partially replaced by means-tested benefits targeted on the poor”. Labour markets were deregulated (or reregulated). There was a return to pre-communist Bismarckian inspired payroll taxes, which replaced financing social insurance through state budgets (e.g. pay-as-you-go pension

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21 For a presentation of scholarly analysis of patterns and agents of change, see Cook (2010: 674-675).
schemes). The market-confirming shift entailed an “overall trend toward less statist and solidaristic, more liberal and market-oriented welfares institutions” across the whole region. In this respect, the international financial institutions (IFI) were important actors in the market-confirming transition:

“Most CEE governments depended on International Monetary Fund (IMF) stabilization agreements for some part of the 1990s, and loan conditionalities included social and labour policies … The need to attract foreign investment produced pressures for more flexible labour markets. In the view of Deacon (2007) and his collaborators, during this period the social policies of transition states were made at the headquarters of the IFIs” (ibid.: 676).

Thus, according to Cook, the welfare reforms in the CEE region must be seen as a result of both domestic and international pressures. On the one hand, IFIs put pressure toward liberal-inspired policy which involved pension schemes that reduced intergenerational solidarity, redistribution, government responsibility, fiscal pressure to cut entitlements and restrict eligibility. On the other hand, the international pressure met domestic countervailing forces, particularly regarding healthcare and benefit reforms. Thus, the result of the transition in the EEC region was not a “radical breakthrough”. The conflicting pressures resulted in “compromise solutions” and “hybrid arrangements” (ibid.: 677).

It is important to point out that there are internal variations of decline of welfare and liberalization in the EEC region. In this respect, Cook describes Poland as an intermediate case regarding poverty and liberalizing institutional change. However, regarding the various welfare states in the CEE region, Cook notes that “similarity outweighs diversity”. Hence, Cook argues that analysts can characterize the EEC region as a single ‘regime type’.

The greatest challenges to the CEE welfare states is demographic development and low labour force participation (ibid.: 681; see chapter 6). Low labour market participation weakens tax bases and worsens dependency ratios, this also excludes part of the populations from the work- and earnings-dependent benefits that have “increasingly characterized social insurance provision”. Furthermore, the development toward an elder population coupled with below-fertility contribute to the problems (ibid.).

Regarding the welfare system at a general level,

“[w]elfare systems overall have become less redistributive, more stratified, and favourable to middle- and upper-income groups, while strong popular support for state provision and universal entitlements maintain influence for solidaristic legacies. Since
EU accession, out-migration of labour and remittances have become important factors in the income/stratification/welfare mix” (ibid.: 682).

**Family and gender policies**

Cook states that “high unemployment and economic insecurity have rendered women more economically dependent on families and men’s incomes, underlining the communist era ‘dual breadwinner’ model throughout the region.” (ibid.: 683). A falling labour market participation rate amongst women well below 60 per cent in many states (including Poland)\(^\text{22}\), and reformed social security systems towards individual earnings’ have contributed to increased gender disparities. Furthermore, the liberalization of the labour market has “eroded protections around pregnancy and child-bearing, and availability of socialized child care remains limited” (ibid.).

Even though many family benefits and services has been retained, the public provision trend is tilting towards *refamiliarization* of health and education. This has in turn contributed to an increases in reliance on informal networks and women’s care work. Cook adds that these developments have been combined with falling birth rates, and increased domestic violence and sex trafficking. The prospects of politics addressing these challenges seems unlikely, as “[p]olitics throughout the region is male-dominated, limiting voice and representation of women’s issues” (ibid.; see table 1).

Poland is, according to Heinen and Wator (2006), seemingly not a forerunner in childcare and women-friendly welfare services and benefits. They argue that childcare in Poland is “still a women’s business”. Furthermore, the Communist regime subordinated childcare policies and gender equality to economic interests, and measures enforced in public childcare and childcare leave revealed that – despite a progressive constitution – Polish women were treated as second-class citizens. This has not changed with the transition to a market economy accompanied by massive privatizations; “women are still seen primarily as mothers and suffer discrimination in the labour market”. In addition, Heinen and Wator argue that,

“The weight of the Church and the traditional point of view concerning women’s place in society brake any movement of emancipation, and most women still consider that their main duty lies in their role as mothers”.

Heinen and Wator explains that the ideals of child well-being and the figure of the polish mother (*Marka Polka*) are important to understand the public sector availability of public child care.

\(^{22}\) Cook’s numbers are from ILO, 2009.
There is low demand for places in public child care centers, and some of the explanation for this is a bad reputation acquired from the Communist era. This opinion is seemingly still alive (Heinen and Wator 2006, citing Portet 2003b). In addition, this opinion is enforced by represenations of child well-being, or “ideals of care”. Heinen and Wator points out that while Swedes considers age one to be most favourable for integrating childs into group care, Poles prefer prolonged care by mothers and prefer to start children in group care at age three. Heinen and Wator draws on a survey from 1998, that shows that 71 per cent of the population (men and women) believe that women should suspend paid work at least until their children reach age three. This study also showed that 22 per cent believed that she should stay with her child until its seventh year.

According to Cook, there is especially two divergent trends in policy toward women and families in the CEE region. In Poland (and Russia) there has been an increase in statist benefits and protections, restriction of abortion rights and promotion of women’s domestic and maternal roles. Cook argues that these policies, animated by pro-natalism and championed by rightist and nationalist parties, mark a return to traditional gender roles. Furthermore, “the broader revival of nationalism has also revived patriarchal genders ideologies” (2010: 683).

Even though the accession to the EU with its directives (e.g. equal employment opportunities, pay, treatment in the workplace, social security, maternity and parental leaves, recommendations to increase representation of women in decision-making positions) should have bettered the situation, research supporting increased gender equality in the CEE region is limited (ibid.). Many analysts have stressed “the limits of EU’s commitments to enforce incorporation of equality in domestic legislation” (ibid).

In a study on welfare state clustering in EU2523, Castles and Obinger (2008) conclude that the post-communist welfare family is below European families (i.e. North and South continental, English-speaking and Scandinavian models) in welfare provision and outcomes. Furthermore, a study by Gans-Morse and Orenstein (2007) uses Esping-Andersen’s worlds of welfare-framework, and reaches the conclusion that there has emerged an “continental-liberal” hybrid in four states in the CEE region (among them, Poland). On dimensions such as social expenditures, benefit levels, generosity, financing and redistribution, the average post-communist welfare state is somewhat more generous than the average liberal state, however, its simultaneously somewhat less generous than the average continental state. According to

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23 The data covers the periode 2000-2005.
Gans-Morse and Orenstein this is a result of policy makers response to – sometimes conflicting – pressures of economic reforms, globalization and legacies of popular expectations of extensive welfare provision. The combination of these pressures have produced a hybrid welfare model falling between the liberal and conservative welfare world, sharing little with the social democratic one. Cook, citing Offe, describes the hybrid model of CEE welfare states as a “joint outcome of ‘the past’ and ‘the West’” (2010: 685). Furthermore, Cook points out that many comparisons of CEE states and EU15 or OECD are Eurocentric, emphasising low levels of welfare provision in CEE states compared to EU15 or OECD. This is important, as the basis for comparison “matters for judgements about post-communist welfare states” (ibid.).

As noted in the POLFAMIGRA research report 1 (2014), Poland is doing well regarding economic development compared to other European states. In addition, Cook states that several CEE states are doing better on Human Development Index (HDI) than GDP rankings, and are “closer to the EU in human development than economic development”. As a summary of the CEE welfare states, Cooks final remarks might be fitting:

“CEE welfare states have been shaped by the layering of egalitarian legacies of communism, conservative Bismarckian social insurance revivals, and the liberal imprint of the IFIs and other globalizing influences. They have retrenched and liberalized, becoming less solidaristic and redistributive, but still retain large elements of public responsibility for societal well-being and affinities to Europe” (ibid.: 686).

Leave Policies

1. Current leave and other employment-related policies to support parents

a. Maternity leave (urlop macierzyński) (responsibility of the Ministry of Labour and Social Policy)

Length of leave (before and after birth)

- Twenty six or 52 weeks, depending on payment level (see ‘payment and funding’ below. Up to two weeks can be used before the expected date of birth. It is obligatory for the mother to take 14 weeks. The first 20 weeks are referred to as ‘maternity leave’ (urlop macierzyński), the next six weeks as ‘additional Maternity leave’ (dodatkowy macierzyński).

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24 Michon and Kotowska (2013)
- If the 52 week option is used, the second 26 week period is referred to as ‘Parental leave’ (urlop rodzicielski).
- Eight weeks leave is given in the case of the death of a baby.

Payment and funding
- Twenty six weeks at 100 per cent of average earnings for 12 months before the birth or 52 weeks at 80 per cent, with no ceiling on payments
- Funded from the Social Insurance Fund, financed by contributions by employees and self-employed workers (but not employers), with some additional finance from the State to cover pension contributions.

Flexibility in use
- The non-obligatory part of Maternity leave can be combined with part-time working, with payment proportional to the working time.
- The mother has to decide what leave to take (26 or 52 weeks) two weeks before the start of the leave. If the mother decides for 26 weeks, she can change to the 52 week option at the end of this period, in which case she is paid 100 per cent
- The second 26 weeks period can be taken as one continuous period of leave or as several periods, each not shorter than eight weeks.
- After the obligatory period of 14 weeks leave, the remaining entitlement can be transferred to the father.

Eligibility (e.g. related to employment or family circumstances)
- Insured employees, including all employees and self-employed women covered by social security insurance at the start of leave.
Variation in leave due to child or family reasons (e.g. multiple or premature births; poor health or disability of child or mother; lone parent); or delegation of leave to person other than the mother

- In the case of multiple births, leave is extended to 65 weeks for twins, 67 weeks for triplets, 69 weeks for quadruplets and 71 weeks for quintuplets. Six weeks of this supplementary leave for multiple births is referred to as ‘additional Maternity leave’.

b. Paternity leave (urlop ojcowski) (responsibility of the Ministry of Labour and Social Policy)

*Length of leave*
- Two weeks.

*Payment and funding*
- Hundred per cent of average earnings for 12 months before birth, with no ceiling on payments.

*Eligibility*
- Insured employees, including all employees and self-employed men covered by social security insurance at the start of leave.

*Flexibility in use*
- It can be taken any time during 12 months after the birth of a child.

c. Parental leave (urlop wychowawczy – literally ‘childcare leave’) (responsibility of the Ministry of Labour and Social Policy)

*Length of leave*
- Thirty six months after maternity leave until the child is four years old. The entitlement is per family.

*Payment and funding*
- A parental allowance (Dodatek z tytułu opieki nad dzieckiem w okresie korzystania z urlopu wychowawczego) is paid to parents taking leave as a supplement to family benefit. A sum of PLN400 (€96 – conversion rates as of 28.05.2013) per month is paid if monthly household income per capita does not exceed PLN552 (€132). The basic payment is for 24 months, but the period can be extended to 36 months where there is more than one child.
- Funded from general taxation.

**Flexibility in use**

- Leave can be taken until a child’s fourth birthday.
- Parents can take leave in one continuous period or in up to four separate blocks.
- Parents can take leave together for up to three months.
- During the Parental leave period, parents may be employed and claim parental allowance, if working does not prevent them from caring for their children. A parent working while on leave can be employed by a different employer.

**Eligibility (e.g. related to employment or family circumstances)**

- Employees with a work record of at least six months.

**Variation in leave due to child or family reasons (e.g. multiple or premature births; poor health or disability of child or mother; lone parent); or delegation of leave to person other than the parents**

- Leave may be extended for another 36 months if a child is disabled or chronically ill and requires care, but can be taken no later than the child’s eighteenth birthday. A payment of PLN583 (€139) per month is made in these cases and the payment period can be extended up to 72 months.

**d. Childcare leave or career breaks**

No statutory entitlement.

**e. Other employment-related measures**

**Adoption leave and pay**

- The same regulations as for parents having their own children.
- Parental allowance is paid if the adopted child is seven years old or younger.

**Time off for the care of dependants**

- An employee can take leave of up to 14 days per year to provide personal care for a family member, paid at 80 per cent of earnings.
- An employee can take leave to care for a child up to eight years of age (14 years if the child is disabled or chronically ill) in the case of an unforeseen closure of a nursery school, kindergarten, or school; or the illness or childbirth of the spouse caring permanently for the child. This leave is also paid at 80 per cent of earnings for up to 60 days.

Flexible working
- None.

2. Relationship between leave policy and early childhood education and care policy

The maximum period of paid post-natal leave available in Poland is nearly 3½ years, but most of this is means-tested and low paid; leave paid at a high rate runs for only five months. There is no entitlement to ECEC, but it is compulsory to attend ECEC (for one year) or to enter school from six years. So there is a gap of some 2½ years between the end of leave and ECEC entitlement and over five years between the end of well-paid leave and an ECEC entitlement. Levels of attendance at formal services for children under and over three years are well below the average for the countries included in this review and for OECD countries. For actual attendance levels, see ‘relationship between leave and ECEC entitlements’ on cross-country comparisons page.

3. Changes in policy since April 2012 (including proposals currently under discussion)

A new leave option has been introduced for women delivering a baby after 17 March 2013. In addition to the 26 weeks of Maternity leave paid at 100 per cent of average earnings, women can now choose to take 52 weeks of leave at 80 per cent of earnings. The second 26 week period is termed ‘parental leave’. Women can also choose to switch from the shorter to the longer option after 26 weeks, in which case the second 26 weeks period is paid at 60 per cent of earnings. As before, leave can be transferred to fathers after the first 14 weeks of leave, which it is obligatory for women to take.

Changes to the Parental leave (urlop wychowawczy) will be introduced in 2013. The leave will be extended to a period of 37 months; 35 months will be the family entitlement, with one additional month only for the mother, and one month only for the father. Employees will be
entitled to use the leave period in five blocks of time; and parents will be able to use four months of leave at the same time.

4. Take-up of leave

a. Maternity leave

There are no regular statistics on use of Maternity leave, though it is obligatory to take leave. Data on maternity allowances provided by the Social Insurance Institution (Zakład Ubezpieczeń Społecznych) refer to the number of days paid and cannot be used to calculate the number of users. It is likely that, due to the increase in the number of births since 2004, the number of mothers on Maternity leave in Poland also increased, and the number of days of Maternity leave used in a year has been rising: from 22,262 days in 2004 to 29,999 in 2007, 35,125 in 2008, 39,608 in 2009, to 42,624 in 2010; in 2011, it fell back to 41,594, due to a decline in the number of births, but increased to 46,322 in 2012.

The average payment has risen from PLN42.49 (€10) a day in 2005 to PLN72.58 (€17) in 2012. The main reason for this rise in the average payment is increased earnings in Poland. There is no information on the number of fathers who take a period of Maternity leave.

b. Paternity leave

Statutory leave entitlement was only introduced in 2010. The first data on take-up indicate that 16,600 out of 100,000 entitled fathers took advantage of the leave in the 12 months up to August 2011; in the next 8 months, the number of fathers taking leave was 14,200, implying an increasing take-up rate.

c. Parental leave

There are no regular and coherent government statistics on the use of Parental leave and parental allowances. Statistics show the number of parents taking leave declined from 336,000 in 1993 to 139,000 in 2000; a major reason for this fall was the rapid decline in fertility, the number of births dropping from 547,700 in 1990 to 378,300 in 2000. Another source shows that the number of persons returning to work from Parental leave and unpaid leave declined steadily from 49,000 in 2000 to 41,000 in 2002 and 35,000 in 2005. Other statistics refer to the monthly average numbers receiving ‘parental allowance’, the supplement to family benefit paid to parents taking Parental leave: these have declined from 164,000 persons in 2000 to 63,000 in 2003. Reforms of family benefits implemented in 2004
increased the numbers to 140,000 in 2005 but they fell back to 130,668 in 2006, 126,178 in 2007, 125,100 in 2008, 121,200 in 2009 and 111,900 in 2010. The average amount of the ‘parental allowance’ has also been decreasing in recent years, from PLN403.56 (€96) per month in 2005 to PLN381.90 (€91) in 2008; but in 2009, there was a small increase to PLN385.88 (€92). Summing up, the available official statistics do not show the incidence of Parental leave among parents entitled to take leave, the proportion of parents who receive parental allowance, or the average duration of leave; and despite the fact that fathers are entitled to Parental leave since 1996, no data about take-up are collected.

A more precise picture of take-up of Parental leave comes from analyses of data collected in the second quarter of 2005 using a module added to the Labour Force Survey (Kotowska and Baranowska, 2006; Matysiak, 2007). Amongst those entitled to take Parental leave, nearly 50 per cent of mothers but only 2.5 per cent of fathers took the leave. Due to the low benefit level and means testing, Parental leave was most used by low paid mothers and mothers with low levels of education; leave was taken by 37 per cent of mothers with university education, 54 per cent with secondary education, and 61 per cent with the lowest educational level. Women with higher qualifications (specialists and managers) were also more reluctant to take leave than women employed in the personal service sector or offices.

About 70 per cent of women who took Parental leave were entitled to parental allowance (i.e. their household income was low enough to be eligible). One in two women with tertiary education received parental allowance compared to 72 per cent of women with only secondary education and 81 per cent of women with the lowest level of education. Women living in villages were more likely to receive the allowance than their counterparts in towns (82 per cent and 64 per cent respectively).

A substantial majority of mothers took full-time leave (80 per cent) despite the right, since 2003, for part-time employment during the leave period. Similarly, most women on leave (almost 93 per cent) did not take advantage of the option to take leave in more than one block of time.

Among reasons for not taking Parental leave, mothers indicated financial reasons more often than fathers (30 per cent of mothers vs. 14 per cent of fathers). However, reasons related to employment seem to be more relevant than financial ones. Concerns about possible negative career impacts of taking Parental leave and preferences to stay in employment were raised by
37 per cent of mothers and 30 per cent of fathers. Urban residents were more concerned about these negative effects.

In discussion on take-up of Parental leave, the underdevelopment of institutional childcare services cannot be ignored. In 2005 only two per cent of children under three years of age attended crèches, and 41 per cent of children aged three to five years attended kindergartens; according to the National Statistics Office, in 2010-11 20,174 two-year-olds were in nursery, compared to 192,588 children three-year-olds who were in kindergarten. These figures for attendance at ECEC are low compared to other EU Member States. In addition, no childcare subsidies are offered to families. The estimated cost of childcare to a minimum income earner ranges from 23 per cent of earnings to 82 per cent and for a person with an average monthly income from 8.5 per cent to 30 per cent. Childcare is therefore less affordable to single and/or minimum income families and/or for families with more than one child requiring childcare.

If one also takes into account the rather inflexible work arrangements and the limited provision of part-time work, it is clear there are strong incompatibilities between work and parenthood in Poland. The family policy can be labelled as an ‘imposed home care’ model: employed parents have mostly to rely on themselves and support of relatives to ensure childcare. In the 2005 survey, nearly 45 per cent of mothers of children below three years of age, who were not in work, state that difficulties in reconciling work and care for small children were the main reason for their decisions to stay out of the labour market. At the same time, nearly one-third of mothers could not find a job.

In the largest Polish survey Diagnoza połeczna, published in 2011, the respondents were asked to select a solution that would facilitate the reconciliation of work and family responsibilities (Czapiński and Panek, 2011). Even though the length of Maternity leave has increased in recent years, longer leave was most often given as the best solution for reconciling work and family life, both by women (26 per cent) and men (20 per cent). The next most frequently cited solution was flexible working time (26 per cent women , 23 per cent men), followed by ‘better opportunities for outside home care for young children (up to seven years)’ (16 per cent of respondents). One in ten of both women and men chose prolongation of paid Parental leave as the best method.
5. Research and publications on leave and other employment-related policies since April 2012

a. General overview
Recent years have brought a rising interest in leave policies and work–family arrangements both in research and public discourse. Studies of developments in family life and changes in family policy in Poland have been carried out, often taking a comparative perspective and referring to EU policy. Labour market developments and their possible impacts on family behaviours, as well as the effects of leave policies on employment careers, have also received attention. Moreover, in studies on reconciling work and family life, gender issues and the role of employers are increasingly under consideration.
Another important development in research on family policy is an increasing use of sample surveys designed to study opinions on existing policy measures, the use of these measures and support for different policy options.

b. Selected publications since April 2012

c. Ongoing research
None reported.
5. Southern Europe – Italy

In a widely-cited survey of Esping-Andersen’s typology of welfare states, Arts and Gelissen (2002) point out that a two major criticisms has been (1) the presentation of “Mediterranean welfare states as immature Continental ones”, and (2) “a neglect of the gender-dimension in social policy”.

Arts and Gelissen specifically point out that a criticism has been that Italy was included in the family of corporatist welfare states (furthermore, Spain, Portugal and Greece was not included). Arts and Gelissen point out that there has been “a lively debate about the ‘existence’ of a ‘Southern’ or ‘Latin rim’ model of social policy’. This debate mainly consists of two views according to Arts and Gelissen: On the one hand, Esping-Andersen (1997: 180) and Katrougalos (1996) argue that “the Mediterranean countries ‘do not form a distinct group but rather a subcategory, a variant of the Continental model’, i.e. they are underdeveloped versions of the Continental model. On the other hand, Leibfried (1992), Ferrera (1996), Bonoli (1997) and Trifiletti (1999), argue that “it seems logical to see the South European countries as a separate cluster”.

As Graziano and Jessoula (2011) point out, at a general level, the Italian welfare state is often characterized as an example of the continental or conservative (“Bismarckian”) welfare regime. However, with different conceptual lenses, it might be a representative of the Southern European welfare state family (Esping-Andersen 1990; Ferrera 1996). Adding a third conceptual lense, the Italian welfare state might represent a distinct “Mediterranean” regime. In a comparative study of welfare regimes’ spending (as percentage of GDP) on services for families, elderly and disabled, and active labour market policies (ALMP) support to reduce social risks, Taylor-Gooby finds that “[s]pending in the Mediterranean states has expanded rapidly from a low base and now exceeds the liberal group in family care” (2004: 15-16).

Thus, in a social-spending perspective, the Italian welfare state is presented as slightly more generous compared to liberal welfare states.

Lynch (2014) has pointed out that a key characteristic of welfare states is securing its citizens against social risks, simultaneously it should enhance well-being and economic functioning. Accomplishing these tasks is primarily done through both vertical (between individuals and

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25 Tables from Arts and Gelissens article on different regime typology work is included in the appendix.

26 Services for elderly and disabled include: residential care, home-help services, day care, and other services. Services for family include: formal day care, personal services, household services, other family benefits in kind. ALMP include: training, youth measures, subsidised employment, employment measures for disabled people, employment services.
social groups) and horizontal (within individuals, over the life-course) redistribution. In this respect, Lynch states that the Italian welfare state historically has done a “rather good job” of horizontal redistribution. The main critiques of the Italian welfare state is related to “how effectively it contributes to easing three important social cleavages: region, gender and generation” (ibid.).

Among the welfare states in this report, Italy stands out as most hard-hit by the financial crisis of 2007/2008. As Maino and Neri has pointed out, this has had consequences for social care,

“The economic and financial crisis, which started in 2007-08, pushed central government to severe cuts in public expenditures, especially after the explosion of the Greek case in 2010. The pressures exerted by the financial markets on the sovereign debt of European countries with a huge public debt, obliged the Italian central government to respect the conditions of severe financial discipline. Since 2008, the public sector has been subjected to severe cost-containment policies. Among the public services, schools and education have been subjected to severe cuts in the budget, matched with structural reforms. In 2010 the government adopted a three-year freeze on salary increases and strict limitations to new recruitment in the public sector as a whole” (2012: 129).

Furthermore, Lynch (2014) has argued that the financial crisis hampered possibilities to generate reforms that could reduce considerable social cleavages and inequites affecting the Italian economy from 1945 and onwards. Lynch also argues that changes imposed by austerity measures will not reduce long-existing problems related to inequalities. Generational inequalities is of the aspects she discusses, stating that “reducing pensions for current and future elderly without doing more for kids and working-aged population is hardly a recipe for generational inequality”. The economic resources these cuts have feed up, “should be invested in children and young adults to ensure the long-term sustainibilty of the Italian eceonomy”. To better the employment situation, Lynch further argues that Italy should look to Spain, where recent policies has made it easier for women to enter the labour force. The changes in Spain include “a comprehensive, new, publicly funded, universal social scheme for dependent care, significant investment to increase public childcare places for children aged 0-2 years, and a paid paternal leave allowance” (see also Naldini and Jurado 2013).

Family Policy

Lynch (2014) argues that the Italian welfare state often is critiqued for gender inequalities, resonates well with welfare research findings (e.g. Bimbi 1999, Triffileti 1999, Addabbo,
Caimumi and Maccagnan 2012). Bimbi points out an interesting paradox regarding the Italian welfare state: On one hand there is a strong moral and ideological emphasis on the family (which is also expressed in party politics), on the other hand there is a “general lack of family policy, something which has been a persistent feature of the postwar period” (Bimbi 2012, citing multiple sources). According to Bimbi, the explanation for this is threefold:

1) First, there still exists a profound reaction to Fascism which “produced explicit pronatalist family policies and categorical policies for lone mothers”.

2) Secondly, “[t]he postwar Mediterranean model of welfare has featured a long period of family care for children and relatives, supported by a law on relatives’ obligations in Italy, alongside residual state responsibility for family welfare. This means, among other things, that the state organizes its activities while constantly recognizing the legitimate priority of the family group to mediate individual rights”.

3) Thirdly, “…the characteristic demographic trend (that is, the presence of profound changes but the continuing importance of traditional forms of matrimonial and intergenerational ties) points to the hegemony of a shared cultural model, whose hallmark is the importance of the family group”.

Furthermore, there is seemingly a double burden on women in the Italian welfare state. The Italian family seems to hang on to traditional gender roles to a larger extent than many other advanced welfare states, as Addabio et al. (2012) notes, “[t]he allocation of domestic and care work time and total work in Italy is very unevenly distributed. The Italian family-oriented Mediterranean type of welfare state has been found to discourage an equal division of labour within the family”. Addabio et al. finds that the number of children of any group has a negative effect on mothers’ working hours. They conclude that “this phenomenon leads to calls for an increase in the availability of childcare services and better synchronization between working times and school opening times in order to increase the female labour supply”.

Using a longitudinal, multi-level analysis approach entailing 17 countries in the period 1965-1998, Van der Lippe et al. (2011) finds that institutional conditions like economic circumstances, policy conditions and cultural influences are of importance in gender-inequalities in time use in paid work and housework. Their study finds that “men and women in highly developed economies and in countries with high rates of child-care facilities do more paid work, although they spend less time on paid work after having children. With respect to the influence of culture, it appears that highly educated and married women in masculine countries do less paid work, and that married women also do more housework, than their
counterparts in more feminine cultures”. Their analysis also shows that social policies are important, and this is particularly so for paid work. Furthermore, “more spending on child care implies more time on paid work by women, an effect that is stronger when children are young”. Addabbio et al. concludes, “[i]n light of the negative effect on mothers’ working hours of the number of children of any group, this phenomenon leads to calls for an increase in the availability of childcare services and better synchronization between working times and school opening times in order to increase the female labour supply”.27

Leave Policy28

1. Current leave and other employment-related policies to support parents
   a. Maternity leave (*Congedo di Maternità*) (responsibility of the Ministry of Labour, Health and Social Policies and (for public employees) Ministry of Economy and Finance)
      
      *Length of leave (before and after birth)*
      - Twenty weeks (five months): at least four weeks before the birth. It is obligatory to take this leave.

      *Payment and funding*
      - Eighty per cent of earnings with no ceiling for salaried workers. For home helps, self-employed workers and agricultural temporary labourers, earnings are 80 per cent of conventional earnings determined each year by the law; for non-fixed term workers, maternity leave depends on accredited contributions, though each professional sector has the possibility to determine, with approval by the Ministry of Labour, Health and Social Policies, a higher ceiling, after considering income and contribution potential of the professional sector and compatibility with its financial.
      - Funded by INPS (National Department for Social Welfare), financed by contributions from employers and employees at a rate that is related to the sector and to the type of contract (for example, in manufacturing it is 0.46 per cent of earnings for employers and 0.28 per cent for

27 An interesting aspect, that might develop into a future challenge (or debate) regarding European integration facing the Italian welfare state, relates to their time-regime, specifically their *siesta*. As Claes Offe notes, European integration supports “diversity” but in certain aspects “[i]t might well be argued that European integration is, at least in some areas, eroding rather than protecting diversity” (2015: 70). Here, Offe refers to the Italian philosopher Giorgio Agamben’s (2013) “calling for a defence of a ‘Latin’ vs an intrusively homogenizing ‘Germanic’ culture”. Offe – citing Yardley (2014) – exemplifies this by the “debate on whether the traditional Spanish time regime with its mid-day *siesta* should be abolished”.

28 Addabbo and Giovannini (2013).
employees). Workers on Maternity leave may be paid direct by INPS or else by their employer, who is recompensed by INPS.

Flexibility
- For employees and workers enrolled in ‘Gestione separata’133, the 20 week period is compulsory, but there are two options for taking this leave: four weeks before the birth and 16 weeks after (upon presentation of a medical certificate); and eight weeks before the birth and 12 weeks after. The allowance is accorded to autonomous female workers from eight weeks before the birth to 12 weeks after; maternity leave, however, is not compulsory for this category.
- The mother can transfer two days to the father.

Eligibility (e.g. related to employment or family circumstances)
- All employees and self-employed women with social security membership, including workers enrolled in Gestione separata.

Variation in leave due to child or family reasons (e.g. multiple or premature births; poor health or disability of child or mother; lone parent) or delegation of leave to person other than the mother
- In the case of multiple or premature births, the length of leave increases by 12 weeks.

Additional note (e.g. if leave payments are often supplemented by collective agreements; employer exclusions or rights to postpone)
- Public sector employees receive 100 per cent of earnings.
- In general national collective agreements guarantee 100 per cent of earnings, with employers paying the additional 20 per cent.

b. Paternity leave (congedo di paternità) (Ministry of Labour, Health and Social Policies)

Length of leave
- One day of compulsory leave. Fathers can take two additional days if the mother agrees to transfer these days from her Maternity leave allocation.

Payment and funding
- One hundred per cent of earnings.
Flexibility
- None.
- Leave can be used until five months after childbirth.

Eligibility
- All employees.

Additional note (e.g. if leave payments are often supplemented by collective agreements; employer exclusions or rights to postpone)
- Employed fathers, including those who are self-employed and enrolled in Gestione separata, may take three months paid leave following childbirth in the following circumstances: the mother’s death or severe illness; the child being left by the mother; or the child being in the sole care of the father. An important verdict by the Tribunal of Florence extends the possibility of obtaining Paternity leave, paid at 80 per cent of earnings, to two months before childbirth. This means that the father can take the whole period of Maternity leave in certain circumstances, i.e. if the mother is a housewife or ill or, alternatively, if she is a self-employed worker who cannot take advantage, for various reasons, of the leave. The Tribunal is a civil court and its decision acts as an important precedent for other Tribunals, but is not automatically binding on them. Conditions are the same as for Maternity leave.

c. Parental leave (Congedo Parentale) (responsibility of the Ministry of Labour, Health and Social Policies and (for public employees) Ministry of Economy and Finance)

Length of leave (before and after child’s birth)
- Each parent is entitled to six months leave, which is an individual and non-transferable entitlement. However, the amount of leave that can be taken by two parents in a family is ten months unless the father takes at least three months leave, in which fathers are entitled to one month of additional leave.

Payment (during the length of Parental leave) and funding
- Thirty per cent of earnings when leave is taken for a child under three years; unpaid if taken when a child is three to eight years, unless annual earnings are under approximately 2.5 times the amount of minimum earnings (€14,891.50 in 2009), in which case parents are entitled to 30 per cent of earnings.
- Funded as Maternity leave.
Flexibility in use
- Leave can be taken at any time until a child is eight years old. There are two options for taking this leave: a single leave period up to a maximum of six months; or shorter leave periods amounting to a maximum of six months.
- Parents can take leave at the same time.
- From the end of Maternity leave until 11 months after the birth, mothers can exchange their Parental leave for vouchers of €300 per month for use in reducing childcare costs.

Eligibility (e.g. related to employment or family circumstances)
- All employed parents, except domestic workers and home helps. Self-employed workers are generally entitled to three months, which can be taken only during the first year after child’s birth.
- The father is entitled to leave even if the mother is not, for example if she is a housewife. Circular letter B/12-5-2009 from the Department of Labour, Health, and Social Policies extends the right to fathers to make use of the leave indicated in the art. 40c, Act of Law n. 151/2001 (right to work reduced hours with full earnings compensation for the first 12 months after childbirth) if the mother is a housewife; previously this right was limited to fathers where the mother was self-employed. This change gives equal value to the domestic work of non-employed mothers as to paid work.
- Parental leave of three months, to be taken within the first year of the child, is available to workers enrolled with Gestione separata by the INPS.

Variation in leave due to child or family reasons (e.g. multiple or premature births; poor health or disability of child or mother; lone parent); or delegation of leave to person other than the parents
- As the leave is per child, each parent is entitled to additional leave in the case of a multiple birth (e.g. the length is doubled for twins, tripled for triplets).
- A lone parent may take ten months of leave.

Additional note (e.g. if leave payments are often supplemented by collective agreements; employer exclusions or rights to postpone)
- Public sector employees receive 100 per cent of earnings during the first 30 days of leave.
- The law on Parental leave is due to be revised according to financial legislation passed in 2008 (*Legge finanziaria 2008*) with the aim of increasing payment and flexibility. A review is currently underway.

d. Childcare leave or career breaks
- None.

e. Other employment-related measures

*Adoption leave and pay*
- For adoptive and foster parents the same regulations for Maternity and Parental leave apply as for other parents. The period of Maternity leave does not depend on the age of the child adopted and must start within five months of entering the family; in case of international adoption, the leave can be taken also for overseas visits in connection with adoption. The Parental leave for adoptive and foster parents can be taken within eight years of the child entering the family and not after his/her eighteenth birthday; payment, generally, is 100 per cent of earnings for the first 30 days and 30 per cent for the following five months, if taken within three years of the entrance of the child into the family.

*Time off for the care of dependants*
- Without limit for a child under three years; five days a year per parent for a child aged three to eight years. Unpaid.
- Public or private employees are entitled to two years leave over the course of their entire working life in case of a serious need in their family, for example the disability of a child or other relative, even if not co-resident. This leave is fully paid by INPS (National Department for Social Welfare). Fathers and mothers cannot take this leave at the same time. Law 4 November 183/2010 (*Collegato Lavoro*) changes the conditions of eligibility for this leave - three paid days a month - for relatives of a disabled person. Apart from parents, this leave cannot be taken by more than one relative.

*Flexible working*
- Until a child is 12 months old, women who are employees are entitled to work reduced hours (one hour less per day if working six hours a day or less; two hours less per day if working longer), with full earnings compensation. Fathers are entitled to use this benefit in certain conditions, for example: if the mother is self-employed or freelancer; if the mother opts not to
use it; if the mother is not employed; or if the father has sole custody of the child. Home helps, domestic workers and autonomous workers are not entitled to reduced hours, but in this case too the father can work reduced hours.

- Employees (mothers and fathers) who have parental responsibility for a child under six years or a disabled child under 18 years have a legal right to apply to their employers to work flexibly (e.g. to reduce their working hours). Employers have a legal duty to consider these requests and may refuse them only ‘where there is a clear business ground for doing so…[and must give] a written explanation explaining why’.

2. Relationship between leave policy and early childhood education and care policy

The maximum period of paid post-natal leave available in Italy is 15 months (including a bonus month if the father uses 3 months of Parental leave), and there is only around 4 months of well-paid leave entitlement. There is no entitlement to ECEC, though nearly all children over 3 years attend ECEC from 3 years of age. However, despite being recognized as a social right for children and working mothers by Law 1044/1971, provision of ECEC for children under 3 years is much lower and very variable between different regions. Levels of attendance at formal services for children under 3 are below the average for the countries included in this review, but above average for children over 3 years. For actual attendance levels, see ‘relationship between leave and ECEC entitlements’ on cross-country comparisons page.

3. Changes in policy since April 2012 (including proposals currently under discussion)

Reform of the labour market implemented in January 2013 has brought in a number of changes. It re-introduces monitoring to avoid ‘dimissioni in bianco’, a practice enacted by firms to get rid of mothers at childbirth, by extending the period from one to three years after childbirth during which time an employer has to communicate to the Ministry of Labour the dismissal of a parent to get it validated. It also introduces a one day period of compulsory paid Paternity leave plus the possibility of two more days if the mother agrees to transfer to the father two days of her Maternity leave. This has been introduced on an experimental basis for three years, until the end of 2015.

29 See: http://www.lavoro.gov.it/ConsiglieraNazionale/In_Evidenza/20130404+Procedura+convalida+dimissioni.htm
To promote female labour supply, the reform also includes a voucher system to be used for childcare by new mothers, who will have the right to claim these vouchers in place of Parental leave from the end of compulsory Maternity leave up to 11 months after childbirth i.e. during the period of non-compulsory leave. This measure has been introduced by Law 92/2012 and will operate on a trial basis in 2013-14.

4. Take-up of leave
a. Maternity leave
Maternity leave is obligatory for employees. In 2011, according to administrative data of the National Department for Social Welfare, about 380,000 employees used compulsory Maternity leave; 9 per cent were temporary workers and 91 per cent permanent workers.30

b. Paternity leave
As this was only introduced in January 2013, there is no information as yet on take-up of leave.

c. Parental leave
In 2011, Parental leave was used by 296,000 employees (6.4 per cent with temporary contracts and 93.6 per cent with permanent contracts); as with Maternity leave, the type of contracts varied regionally. According to the INPS data used for this analysis, 89 per cent of employees using Parental leave are women and 11 per cent male.

5. Research and publications on leave and other employment-related policies since April 2012
a. General overview
The literature analysed deals with the gender allocation of time and work-life balance. The unbalanced distribution of time amongst Italian couples is confirmed. New data are provided on the take up of Parental leaves. Attention is also paid to the description of the normative changes introduced in Italy and to family policies in a comparative perspective.

b. Selected publications since April 2012


This chapter examines the role of women in the Italian economy together with the evidence of gender inequalities in different areas; it also presents data on the allocation of time and on the policies that can improve women's participation to the labour market including also public child care services.

This book contains a comparative analysis on changes in the structure of the family, fertility, child well-being and family policies in OECD countries with concluding remarks on the Italian situation and possible perspectives.

Amongst other data, this report contains an update on the take-up of Parental and Maternity leaves.

On-line document providing critical analysis of the Labour Reform known as Fornero Reform after the Ministry that designed it.

Collected essays on the historical origins, concepts, indicators and evaluation of family policies.
Schiavone R. (2012, 2nd edn.) *Maternità e congedi parentali*. Milano: Ipsoa Indicitalia. This volume describes the different normative aspects of parenthood with reference to laws and jurisprudence, and includes files on specific cases.

Crespi, I. and Rossi, G. (eds.) (2013) *Balancing work & family care: European experiences*. Milano: Angeli. Collected essays on the issue of innovative work-life balance policies improving the quality of well-being in the interaction of individuals and families in Europe, highlighting the limits of the traditional approaches to work-life balance. Amongst the topics analysed in this volume are the life cycle effects of family choices, caring exchanges between generations, and the impact of social policies in their cultural framework. It contains essays by Isabella Crespi, Giovanna Rossi, Stefan Berger, Vida Cesnuityte, Jean-Marie LeGoff, René Levy, Chris Lorenz, Gerardo Meil, Tina Miller, Pedro Romero-Balsas, Sanda Samitca, Manuela Schicka, Michèle Ernst Stahli, Piotr Teisseyre, Karin Wall and Eric D. Widmer.

Consigliera Nazionale Pari Opportunità (2013a) *Congedo per il padre: istruzioni per l'uso*. Available at: [http://www.lavoro.gov.it/ConsiglieraNazionale/In_Evidenza/20130319+Congedo+di+paternità.htm](http://www.lavoro.gov.it/ConsiglieraNazionale/In_Evidenza/20130319+Congedo+di+paternità.htm) This publication provides an explanation on the new Paternity leave arrangements.

Consigliera Nazionale Pari Opportunità (2013b) *Voucher di cura: Istruzioni per l'uso*. Available at: [http://www.lavoro.gov.it/ConsiglieraNazionale/In_Evidenza/20130403+Voucher.htm](http://www.lavoro.gov.it/ConsiglieraNazionale/In_Evidenza/20130403+Voucher.htm) This publication provides an explanation of the new childcare voucher arrangements.

Consigliera Nazionale Pari Opportunità (2013c) *La procedura di convalida delle dimissioni e risoluzioni consensuali introdotta dalla L.92/2012*. Available at: [http://www.lavoro.gov.it/ConsiglieraNazionale/In_Evidenza/20130404+Procedura+convalida+dimissioni.htm](http://www.lavoro.gov.it/ConsiglieraNazionale/In_Evidenza/20130404+Procedura+convalida+dimissioni.htm) This publication provides an explanation of the new arrangements for monitoring to avoid 'dimissioni in bianco'
This chapter deals with the working conditions and allocation of time in Italy, presenting new indicators to extend the measure of well-being beyond GDP. The Chapter and the system of indicators are part of the research conducted by ISTAT (Istituto nazionale di statistica, Italian National Institute of Statistics) and CNEL (Consiglio Nazionale dell’Economia e del Lavoro, Italian Council on Economy and Labour) on the elaboration of a new system of indicators going beyond GDP, called BES (Benessere Equo e Sostenibile, Sustainable and Equitable Well Being).

c. Ongoing research


Amongst the well-being dimensions that are being analysed in depth are: the capability to work with special attention to access to work and to working conditions in relation to living conditions; and the capability of caring for others with a special focus on the care work done for both co-resident and non-resident relatives. Attention is devoted to gender differences and inequalities and welfare policy implications.
6. Statistics

In this chapter, statistics on Norway, Poland, Italy will be presented. The statistics presented in this chapter is mainly from the OECD databank (https://data.oecd.org). In the following, figures based on charts from the OECD databank and OECD research will be presented and commented. If some of the data is difficult to read off the charts (e.g. statistics on specific years on long-term trend-lines), it might be helpful to view the literature list, as all references include links to specific OECD-sites. In the following chapter, statistics on demography will be presented first, thereafter follows statistics on employment, social spending and inequality.

Demography

Figure 1 - Fertility rate, 1990-2012

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32 OECDs definition of fertility rate: The total fertility rate in a specific year is defined as the total number of children that would be born to each woman if she were to live to the end of her child-bearing years and give birth to children in alignment with the prevailing age-specific fertility rates. It is calculated by totalling the age-specific fertility rates as defined over five-year intervals. Assuming no net migration and unchanged mortality, a total fertility rate of 2.1 children per woman ensures a broadly stable population. Together with mortality and migration, fertility is an element of population growth, reflecting both the causes and effects of economic and social developments. The reasons for the dramatic decline in birth rates during the past few decades include postponed family formation and child-bearing and a decrease in desired family sizes. This indicator is measured in children per woman.
As figure 1 shows there has been significant drop in fertility rate in Poland from 1990 to 2012. In 1990 the fertility rate was 1.99 children per woman, in 2012 the fertility rate was reduced to 1.3 – a total decrease of 0.69 percentage points. Norway has been more stable, with a fertility rate of 1.93 in 1990 and 1.85 in 2012. Italy has a slight increase, from 1.36 in 1990 and 1.42 in 2012.

Figure 2 - Young population\textsuperscript{33}, 1990-2013

\begin{figure}[h]
\centering
\includegraphics[width=\textwidth]{young_population.png}
\caption{Young population, 1990-2013}
\end{figure}

\textsuperscript{33} OECD’s definition of young population: The youth population is defined as those people aged less than 15. The share of the dependent population is calculated as total elderly and youth population expressed as a ratio of the total population. The youth-dependency ratio relates the number of young persons that are likely to be dependent on the support of others for their daily needs to the number of those who are capable of providing such support. Demographic trends have a number of implications for government and private spending on pensions, health care, and education, and, more generally, for economic growth and welfare. This indicator is measured as a percentage of population.
As shown in figure 2 and 3, a similar pattern of decreasing young population and increasing elderly population is apparent in each country, although to a varied extent. A troubling aspect with Italy is that it simultaneously trends toward less youth, more elderly and less in working age, as apparent in figure 4.

OECD’s definition of elderly population: The elderly population is defined as people aged 65 and over. The share of the dependent population is calculated as total elderly and youth population expressed as a ratio of the total population. The elderly dependency rate is defined as the ratio between the elderly population and the working age (15-64 years) population. The comparability of elderly population data is affected by differences, both within and across countries, in how regions and the geography of rural and urban communities, are defined. Elderly people tend to be concentrated in few areas within each country, which means that a small number of regions will have to face a number of specific social and economic challenges due to population ageing. These demographic trends have a number of implications for government and private spending on pensions, health care, and education and, more generally, for economic growth and welfare. This indicator is measured as a percentage of population.
In Poland, Norway and the OECD average, there has been an increased percentage of working age population. In Italy however, there has been a decline from 69.43 in 1993, to 65.15 in 2013. This trend is important to see, among other factors, in relation to the increase in elderly and decrease in young people in Italy. Altogether, the demographic trends in Italy might be harmful for the Italian economy and the sustainability of the welfare state. This might in turn result in unfortunate social consequences.

OECDs definition of working age population: The working age population is defined as those aged 15 to 64. The basic indicator for employment is the proportion of the working age population aged 15-64 who are employed. The age dependency ratio is the ratio of dependents (people younger than 15 or older than 64) to the working-age population. This indicator is measured as a percentage of population.
Figure 5 shows the development of the total employment rate in Norway, Poland, Italy and the OECD average in the period 2000-2014. As is evident, the average of the Norwegian employment rate is higher than the rest. In addition, Poland has had a clear upward trend in employment rate. In 2014, the employment rate was 75.22% in Norway, 65.5% in OECD, 61.67% in Poland, and 55.7% in Italy. However, the total average does not give information about gender differences; this will be presented in figure 6 and 7 (below). To make the comparisons of the average employment rate clearer, they are summarized in table 2.

OECD’s definition of employment rate: “Employment rates are defined as a measure of the extent to which available labour resources (people available to work) are being used. They are calculated as the ratio of the employed to the working age population. Employment rates are sensitive to the economic cycle, but in the longer term they are significantly affected by governments’ higher education and income support policies and by policies that facilitate employment of women and disadvantaged groups. Employed people are those aged 15 or over who report that they have worked in gainful employment for at least one hour in the previous week or who had a job but were absent from work during the reference week. The working age population refers to people aged 15 to 64. This indicator is seasonally adjusted and it is measured in terms of thousand persons aged 15 and over; and as a percentage of working age population.”
Figure 6 - Employment rate (women), 2000-2014

Figure 6 show a distribution of rates with Norway on top and Italy on the bottom. There has been an increase in employment rate among women in Poland and Italy in the period, however, the employment rate in these countries are still comparatively lower than the OECD-average and Norway which is among the top countries in this regard. In 2014, the employment rate was 73.5 % in Norway, 57.91 % in OECD, 55.17 % in Poland, and 46.83 % in Italy.

Figure 7 - Employment rate (men), 2000-2014

The same distribution-pattern as in figure 5 and 6, applies to figure 7; Norway on top, and Italy at the bottom. However, Italy had a far higher employment rate than Poland until 2007/2008. There is a clear downward trend in employment for men in Italy. This gives reason for concern, especially coupled with the comparatively low female employment rate as well. In 2014, the
employment rate among men in Norway was 77 %, 73.61 % in OECD, 68.2 % in Poland, and 64.67 % in Italy.

*Table 2: Overview over employment rate, 2014*

<table>
<thead>
<tr>
<th></th>
<th>Total %</th>
<th>Women %</th>
<th>Men %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Norway</td>
<td>75.22</td>
<td>73.5</td>
<td>77.0</td>
</tr>
<tr>
<td>Poland</td>
<td>61.67</td>
<td>55.71</td>
<td>68.2</td>
</tr>
<tr>
<td>Italy</td>
<td>55.7</td>
<td>46.83</td>
<td>64.67</td>
</tr>
<tr>
<td>OECD</td>
<td>65.5</td>
<td>57.91</td>
<td>73.61</td>
</tr>
</tbody>
</table>

Based on table 2, the gender gap in employment rates in percentage points is as follows:

<table>
<thead>
<tr>
<th>Country</th>
<th>Gender gap in percentage points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Norway</td>
<td>3.5</td>
</tr>
<tr>
<td>Poland</td>
<td>12.49</td>
</tr>
<tr>
<td>Italy</td>
<td>17.84</td>
</tr>
<tr>
<td>OECD</td>
<td>15.7</td>
</tr>
</tbody>
</table>

37 While percent refer to relative change (e.g. a fraction of an original amount), percentage points refer to absolute change. The latter is used to get around ambiguities when comparing two different percentages. Thus, the presented gender gap in percentage points should not be read as changes in percent, but as changes in percentage points. For an elaboration (including example), see [http://thewritingbusiness.com/the-difference-between-percentages-and-percentage-points/](http://thewritingbusiness.com/the-difference-between-percentages-and-percentage-points/).
OECD’s definition of harmonized unemployment rate: Harmonised unemployment rates define the unemployed as people of working age who are without work, are available for work, and have taken specific steps to find work. The uniform application of this definition results in estimates of unemployment rates that are more internationally comparable than estimates based on national definitions of unemployment. This indicator is measured in numbers of unemployed people as a percentage of the labour force and it is seasonally adjusted. The labour force is defined as the total number of unemployed people plus those in civilian employment.
OECD’s definition of long-term unemployment: Long-term unemployment refers to people who have been unemployed for 12 months or more. The long-term unemployment rate shows the proportion of these long-term unemployed among all unemployed. Unemployment is usually measured by national labour force surveys and refers to people reporting that they have worked in gainful employment for less than one hour in the previous week, who are available for work and who have sought employment in the past four weeks. Long-term unemployment causes significant mental and material stress for those affected and their families. It is also of particular concern for policy makers, as high rates of long-term unemployment indicate that labour markets are operating inefficiently. This indicator is measured as a percentage of unemployed.
As Offe points out, “[t]he NEET problem … has begun to be recognized by the Commission as a *virtual time bomb*” (2015: 124-125, own emphasis). He argues that the fact that NEET rates mounts everywhere (except Luxemburg, Austria, Sweden and Germany), is “a compelling illustration of the damages austerity inflicts” (ibid.).

NEET has become a more widely used indicator for social problems in recent years. This indicator shows people (between 20-24 years in OECD statistics in figure 10) not in employment, education or training as a percentage of the total number of young people in the same corresponding age group. As OECD (2015) notes in their definition: “Young people who are neither in employment nor in education or training are at risk of becoming socially excluded – individuals with income below the poverty-line and lacking the skills to improve their economic situation.”

---

OECDs definition of NEET: This indicator presents the share of young people who are not in employment, education or training (NEET), as a percentage of the total number of young people in the corresponding age group. Young people in education include those attending part-time or full-time education, but exclude those in non-formal education and in educational activities of very short duration. Employment is defined according to the OECD/ILO Guidelines and covers all those who have been in paid work for at least one hour in the reference week of the survey or were temporarily absent from such work. Therefore NEET youth can be either unemployed or inactive and not involved in education or training. Young people who are neither in employment nor in education or training are at risk of becoming socially excluded – individuals with income below the poverty-line and lacking the skills to improve their economic situation.
Figure 10 shows that Italy clearly has the highest rate of NEET compared to Poland, Norway and the OECD average. In fact, Italy has the second highest NEET rate in all OECD countries included in the OECD data (after Turkey). In 2013 the NEET rate in Italy was 33.74, compared to 20.18 in Poland, and 10.85 in Norway. The apparent rise in NEET rate in Italy from 2008 onwards, indicates that the Italian youth has been hard-hit by the economic crisis and its aftermath. This is not just a burden to the youths it inflicts, but also effects families, as parents (and grandparents) must help dependent children. This might be particularly burdensome in Italy where the safety net is slimmer than in Norway. However, a troublesome aspect in both countries considering the NEET problem is that unemployment benefits requires earlier work experience. This distinction in safety nets might have several explanations. In an extensive study of the Italian safety net the last two decades, Matteo Jessoula and Patrik Vesan (2011: 161) points out following: “[d]ue to late industrialization, Italy experienced a delayed transition to a service-based economy, fully completed only by the early 1990s”, however, “… tailoring the Italian unemployment protection system to post-industrial conditions is a task that largely remains to be accomplished.” A particularly troublesome dimension is cuts in expenditures on active measures after 2003, something that “does not fit well with the growing number of short-time, fixed-term employment relationships which are typical of a post-industrial labour market”. In this regard, Norway (as well as ‘the Nordic regime’) is well-known for a large emphasis on active measures (see Taylor-Gooby 2004).
As a last indicator of differences in labour markets in Norway, Poland and Italy, is the variation of unemployment rates. Figure 11 shows the differences of unemployment rate by region in Europe, based on Eurostat data from 2011.

Figure 11 - Unemployment by region\textsuperscript{41}, 2011

\textsuperscript{41} Illustration from Jauer et al. (2014: 12).
As the POLFAMIGRA project includes a focus on skilled migration, OECD-data on a regular middle-class salary is presented in figure 12. As a typical middle-class occupation, teachers are chosen as an example. In figure 12, one can see that the salaries (measured in USD) of Polish and Norwegian teachers at upper secondary schools are higher than the OECD average and for Italy.

### Figure 12 - Salaries for upper secondary teachers with 15 yrs. exp., 2012

<table>
<thead>
<tr>
<th>Country</th>
<th>Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Poland</td>
<td>120</td>
</tr>
<tr>
<td>Norway</td>
<td>140</td>
</tr>
<tr>
<td>Italy</td>
<td>160</td>
</tr>
<tr>
<td>OECD</td>
<td>120</td>
</tr>
</tbody>
</table>

OECD definition of Teachers’ salaries: Teachers’ salaries are the average gross salaries of educational personnel according to official pay scales, before the deduction of taxes, including the employee’s contributions for retirement or health care plans, and other contributions or premiums for social insurance or other purposes, but less the employer’s contribution to social security and pension. Salaries are shown in USD covering primary and secondary teachers with minimum qualification at the beginning of their career, after 10 and 15 years, and at the top of the scale. Trends in salaries are shown as an index with base year 2005.
As of 2014, Italy spent 28.6% of GDP on social spending, Norway 22.0% percent and Poland 20.6% percent.

OECDs definition of social spending: Social expenditure comprises cash benefits, direct in-kind provision of goods and services, and tax breaks with social purposes. Benefits may be targeted at low-income households, the elderly, disabled, sick, unemployed, or young persons. To be considered "social", programmes have to involve either redistribution of resources across households or compulsory participation. Social benefits are classified as public when general government (that is central, state, and local governments, including social security funds) controls the relevant financial flows. All social benefits not provided by general government are considered private. Private transfers between households are not considered as "social" and not included here. Net total social expenditure includes both public and private expenditure. It also accounts for the effect of the tax system by direct and indirect taxation and by tax breaks for social purposes. This indicator is measured as a percentage of GDP or USD per capita.
As of 2014, Norway spent 3.083 percent of GDP on family benefits, Italy spent 1.498 and Poland 1.349.

OECDs definition of family benefits spending: Family benefits spending refer to public spending on family benefits, including financial support that is exclusively for families and children. Spending recorded in other social policy areas, such as health and housing, also assist families, but not exclusively, and it is not included in this indicator. Broadly speaking there are three types of public spending on family benefits: Child-related cash transfers (cash benefits) to families with children, including child allowances, with payment levels that in some countries vary with the age of the child, and sometimes are income-tested; public income support payments during periods of parental leave and income support for sole parents families. Public spending on services for families (benefits in kind) with children, including direct financing and subsidising of providers of childcare and early education facilities, public childcare support through earmarked payments to parents, public spending on assistance for young people and residential facilities, public spending on family services, including centre-based facilities and home help services for families in need. Financial support for families provided through the tax system, including tax exemptions (e.g. income from child benefits that is not included in the tax base); child tax allowances (amounts for children that are deducted from gross income and are not included in taxable income), and child tax credits, amounts that are deducted from the tax liability. This indicator is broken down by cash benefits and benefits in kind and is measured in percentage of GDP.
In figure 15, a clear decrease in public spending on unemployment in Poland from 2002 to 2011 is evident. In Norway there has also been a pretty clear decrease, while in Italy the trend has leaned toward increased spending. These developments must be seen in relation to employment and unemployment rate. However, the trends might also be seen in association with changes in unemployment benefits. In this respect, Clasen and Clegg’s *Regulating the Risk of Unemployment* (2011) gives a good overview.
Income inequality

Figure 16 - Income Inequality by Gini-coefficient\textsuperscript{45}, 2012

The Gini-coefficient is a measure from complete equality (0), to complete inequality (1). In 2012, the Gini was 0.253 in Norway, 0.298 in Poland, and 0.327 in Italy. In comparison, the three countries with the highest Gini in the OECD area, is USA (0.390), Turkey (0.402), and Mexico (0.457).

\textsuperscript{45} OECDs definition of income inequality: 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. The income of the household is attributed to each of its members, with an adjustment to reflect differences in needs for households of different sizes. Income inequality among individuals is measured here by five indicators. The Gini coefficient is based on the comparison of cumulative proportions of the population against cumulative proportions of income they receive, and it ranges between 0 in the case of perfect equality and 1 in the case of perfect inequality.
In 2012, the poverty rate in Norway was 0.081, while the poverty rate in Poland was 0.102, and in Italy 0.127.

OECDs definition of poverty rate: The poverty rate is the ratio of the number of people (in a given age group) whose income falls below the poverty line; taken as half the median household income of the total population. However, two countries with the same poverty rates may differ in terms of the relative income-level of the poor.
7. Appendix

Appendix table 1 – Welfare regimes and characteristics

<table>
<thead>
<tr>
<th>Types of welfare states and their characteristics</th>
<th>Indicators/dimensions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Esping-Anderson (1990)</td>
<td></td>
</tr>
<tr>
<td>1. Liberal: Low level of dec commodification; market-differentiation of welfare</td>
<td>Decommodication</td>
</tr>
<tr>
<td>2. Conservative: Moderate level of dec commodification; social benefits mainly dependent on former contributions and status</td>
<td>Socialization</td>
</tr>
<tr>
<td>3. Social-democratic: High level of dec commodification; universal benefits and high degree of benefit equality</td>
<td></td>
</tr>
<tr>
<td>Leibfried (1992)</td>
<td></td>
</tr>
<tr>
<td>1. Anglo-Saxon (Residual): Right to income transfers; welfare state as compensator of last resort and tight enforcement of work in the market place</td>
<td>Poverty, social insurance and poverty policy</td>
</tr>
<tr>
<td>2. Bismarck (Interventional): Right to social security; welfare state as compensator of first resort and employer of last resort</td>
<td></td>
</tr>
<tr>
<td>3. Scandinavian (Modern): Right to work for everyone; universalism; welfare state as employer of first resort and compensator of last resort</td>
<td></td>
</tr>
<tr>
<td>4. Latin Kim (Rudimentary): Right to work and welfare proclaimed; welfare state as a semi-institutionalized promise</td>
<td></td>
</tr>
<tr>
<td>Castles &amp; Mitchell (1993)</td>
<td></td>
</tr>
<tr>
<td>1. Liberal: Low social spending and no adoption of equalizing instruments in social policy</td>
<td>Welfare expenditure</td>
</tr>
<tr>
<td>2. Conservative: High social expenditures, but little adoption of equalizing instruments in social policy</td>
<td>Benefit equality</td>
</tr>
<tr>
<td>3. Neo-Right Hegemony: High social expenditure and use of highly equalizing instruments in social policy</td>
<td>Taxes</td>
</tr>
<tr>
<td>4. Radical: Achievement of equality in pre-tax, pre-transfer income (adoption of equalizing instruments in social policy), but little social spending</td>
<td></td>
</tr>
<tr>
<td>Stanoff (1994)</td>
<td></td>
</tr>
<tr>
<td>1. Protestant Liberal: Minimal family welfare, yet relatively egalitarian gender situation in the labour market; family benefits are paid to the mother, but are rather inadequate</td>
<td>Family welfare orientation</td>
</tr>
<tr>
<td>2. Advanced Christian-Democratic: No strong incentives for women to work, but strong incentives to stay at home</td>
<td>Female work desirability</td>
</tr>
<tr>
<td>3. Protestant Social-Democratic: True work-welfare choice for women; family benefits are high and always paid to the mother; importance of Protestantism</td>
<td>Extent of family benefits being paid to women</td>
</tr>
<tr>
<td>4. Latin Female Mobilization: Absence of Protestantism; family benefits are usually paid to the father; universal female suffrage is relatively new</td>
<td></td>
</tr>
<tr>
<td>Ferrara (1996)</td>
<td></td>
</tr>
<tr>
<td>1. Anglo-Saxon: Fairly high welfare state coverage; social assistance with a means test; mixed system of financing; highly integrated organizational framework entirely managed by a public administration</td>
<td>Rules of access (eligibility)</td>
</tr>
</tbody>
</table>

Appendix table 2 – Welfare regimes and characteristics, part 2

<table>
<thead>
<tr>
<th>Types of welfare states and their characteristics</th>
<th>Indicators/dimensions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bonoli (1997)</td>
<td></td>
</tr>
<tr>
<td>1. British: Low percentage of social expenditure financed through contributions (Beveridge); low social expenditure as a percentage of GDP</td>
<td>Benefit formulae</td>
</tr>
<tr>
<td>2. Continental: High percentage of social expenditure financed through contributions (Bismarck); high social expenditure as a percentage of GDP</td>
<td>Financing regulations</td>
</tr>
<tr>
<td>3. Nordic: Low percentage of social expenditure financed through contributions (Beveridge); high social expenditure as a percentage of GDP</td>
<td>Organizational-Managerial arrangements</td>
</tr>
<tr>
<td>4. Southern: High percentage of social expenditure financed through contributions (Bismarck); low social expenditure as a percentage of GDP</td>
<td>Organizational-Managerial arrangements</td>
</tr>
<tr>
<td>Koperi &amp; Falme (1998)</td>
<td></td>
</tr>
<tr>
<td>1. Basic Security: Entitlements based on citizenship or contributions, application of the flat-rate benefit principle</td>
<td>Bismarck and Beveridge model</td>
</tr>
<tr>
<td>2. Corporatist: Entitlements based on occupational category and labour force participation; use of the earnings-related benefit principle</td>
<td>Quantity of welfare state expenditure</td>
</tr>
<tr>
<td>3. Exocompensary: Entitlement based on citizenship and labour force participation; use of the flat-rate and earnings-related benefit principle</td>
<td>Governance of social insurance programme</td>
</tr>
<tr>
<td>4. Targeted: Eligibility based on need; use of the minimum benefit principle</td>
<td></td>
</tr>
<tr>
<td>5. Voluntary State Subsidized: Eligibility based on membership or contributions; application of the flat-rate or earnings-related principle</td>
<td></td>
</tr>
</tbody>
</table>

47 Appendix table 1 and 2 is from Arts and Gelissen (2010)
8. Literature


Krugman, P. (2013) End this depression now! New York: W.W. Norton & Company


http://www.leavenetwork.org/lp_and_r_reports/


http://www.leavenetwork.org/lp_and_r_reports/


