



# EUROPEAN POLICY BRIEF

## **INTERGENERATIONAL LINKAGES IN THE FAMILY: HOW POLICIES SHAPE THE ORGANISATION OF CARING AND FINANCIAL SUPPORTS FOR FAMILY MEMBERS<sup>1</sup>**



**FamiliesAndSocieties**

This policy brief highlights recent research findings from the project “FamiliesAndSocieties” on the role of laws and policies in shaping gendered interdependencies in families; the way the “sandwich generation” (those who are likely to raise a child or a grandchild and care for parents at the same time) cares for older parents across countries; transfers in Europe from ageing parents to adult children and vice versa; and, the extent to which the financial crisis has affected intergenerational patterns of family support across households. The brief also presents suggestions for policy interventions that can be derived from the findings.

**APRIL 2016**

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<sup>1</sup> This policy brief is co-authored by Pearl Dykstra, Irena E. Kotowska and Pau Mari-Klose. It is part of the tasks of Work Package 12 of the project FamiliesAndSocieties, in charge of dissemination activities, led by the Max Planck Society for the Advancement of Science/Population Europe.

European countries are diverse in terms of the magnitude of their population ageing. According to Eurostat data, in 2014 the share of individuals aged 65+ ranged from 12.6% in Ireland to around 21% in Germany and Italy. However, general trends are similar and population projections suggest an accelerated ageing process in Europe for the upcoming decades: The percentage of individuals aged 65+ is projected to increase from 18% to 28%. At the same time, a remarkable contraction of the working-age population<sup>2</sup> is expected to take place. This group is expected to shrink by around 13% between 2013-2060 (European Commission, 2015), and its share is expected to decline from 66% to 57%. As a result of substantial shifts in the age composition of the total European population, the total age-dependency ratio would rise from nearly 65 to 95 individuals younger than 20 and older than 64 per 100 individuals aged 20-64. In turn, the old-age dependency ratio is expected to rise from 30 to 57 individuals aged 65+ per 100 individuals aged 20-64 (Abramowska-Kmon et al., forthcoming).

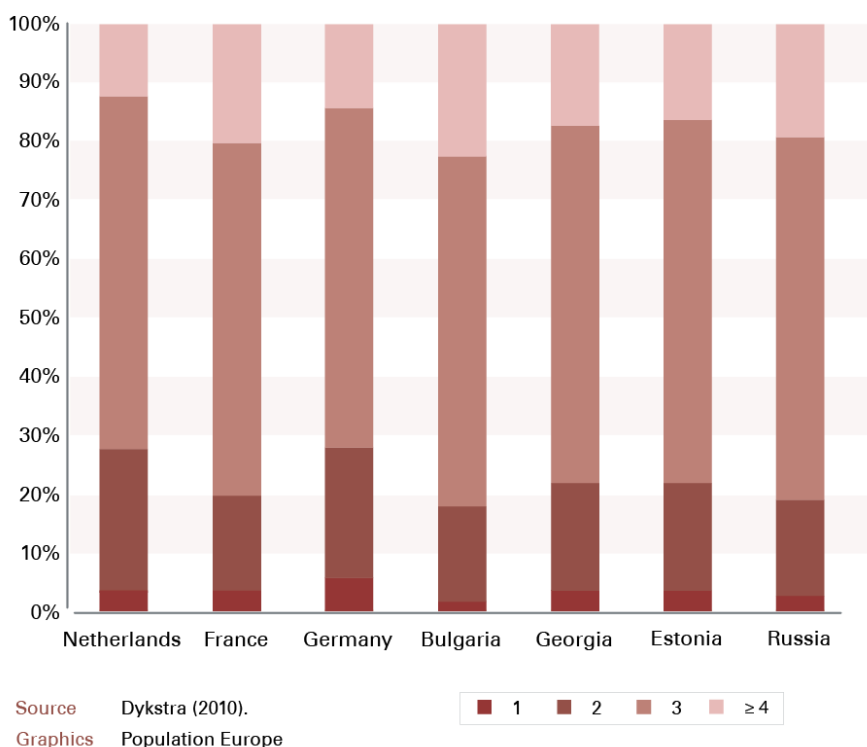
When looking at these demographic processes, it is not uncommon to assume that we are moving towards a considerable increase in the number of generations living inside families. However, extended families with four or more generations are far from being the norm: As shown in Figure 1 with data from the Generations and Gender Programme, the majority of adults in Europe are part of three-generation families. That is, grandparents, children and grandchildren. This is so because increased longevity coincides with the postponement of childbearing, and these processes have opposing effects on the generational structure of families. While older family members are living longer, delayed childbearing implies that the age gap between generations is becoming relatively large, reducing the likelihood that multiple generations are alive at the same time (Dykstra, 2010). In addition, studies indicate that so far the majority of intergenerational support is observed from parents to their offspring (OECD, 2011), and middle-aged individuals are not under pressure to simultaneously care for older and younger family members (Abramowska-Kmon et al., forthcoming).

Country differences give us further insights. For example, the proportions of one, two, three and four generation families are virtually identical in France and Russia (Figure 1). However, the respective underlying demographic processes are very different. In France, where individuals tend to live longer, adults have relatively many ascending family generations (parents, grandparents) (Figure 2). In Russia, where women tend to have children at younger ages, adults have relatively many descending family generations (children, grandchildren) (Figure 3) (Dykstra, 2010).

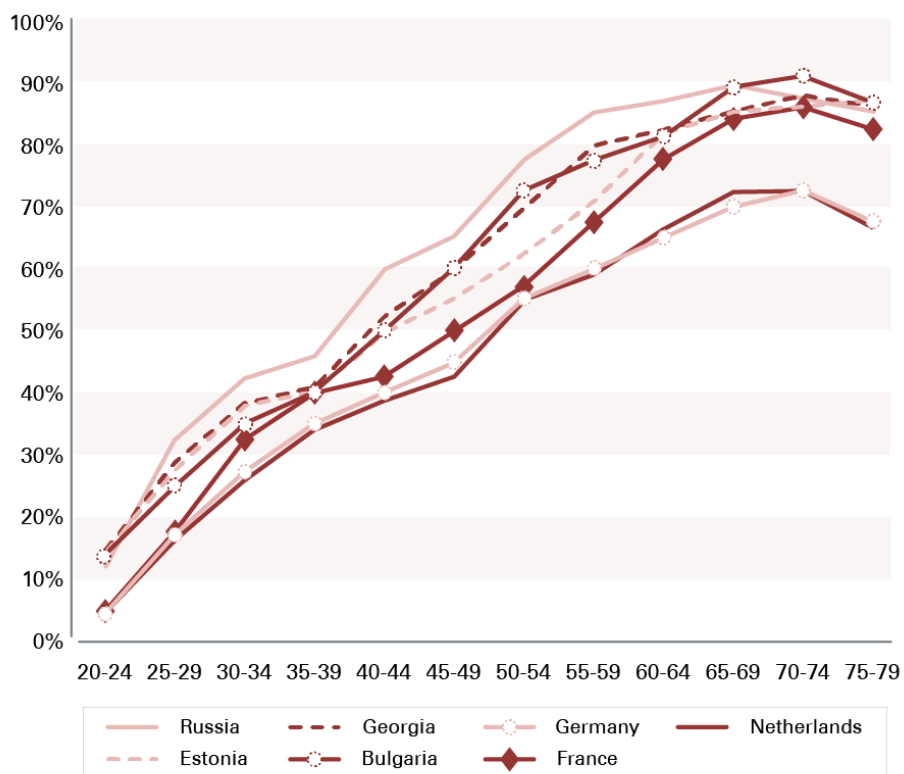
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<sup>2</sup> In the study where this information has been retrieved, the working-age population is defined as those aged 20 to 64 (European Commission, 2015).

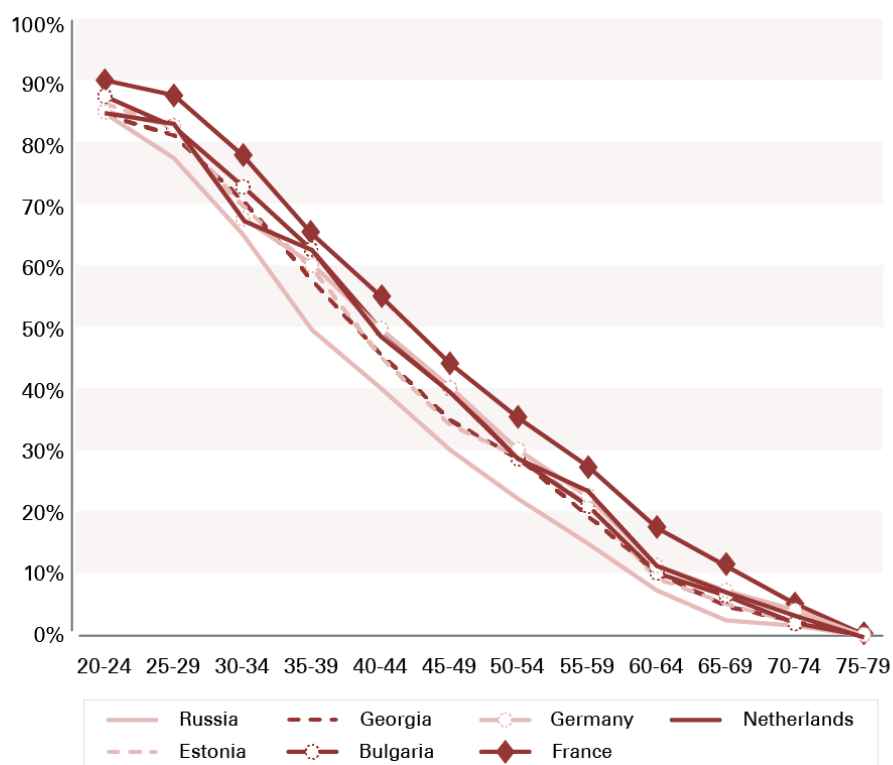
**Figure 1: Adults aged 20-80, by number of family generations, selected GGP-countries.**



**Figure 2: Mean number of descending family generations (children, grandchildren), selected GGP-countries.**



**Figure 3: Mean number of ascending family generations (parents, grandparents), selected GGP-countries.**



Source Dykstra (2010).  
 Graphics Population Europe

## EVIDENCE AND ANALYSIS

### How do laws and policies shape interdependencies in families?

Given concerns over future generations, states have always had a stake in what happens in families. The way laws and policies shape interdependence inside families can take three different forms.

First, laws and policies may establish mandated generational interdependence. Maintenance obligations both up and down are widespread in Europe, and depending on the country, may involve different sets of relatives and generational levels (Saraceno and Keck, 2008). One example are legal obligations for parents to provide financial support to their children until they reach a certain age, but also via parental entitlements to child support from public transfers. Requirements on the duration of these benefits constitute other types of mandated interdependence: To qualify for full paid parental leave, mothers must prove they have worked for a certain period of time prior to the birth of a child. Some country examples further illustrate this: In Norway, the law provides a given duration of paid care leave (for sick family members), but when the illness exceeds the limit of time allowed, the care provider may no longer be considered as working continuously and may lose the continuous duration at work needed for full pension rights. In Italy, grandparents, siblings, aunts and uncles are legally obliged to financially support children if their parents are not able to support them.

Second, laws and policies may block generational interdependence. For instance, when grandparents are not granted the right to raise grandchildren in the case of parents not being able

to provide adequate care; when parents have court orders prohibiting them from visiting their children after divorce; or, when migration laws do not grant temporary visits to enable the provision of care.

Finally, the third mechanism consists of explicitly shaping intergenerational interdependence. A clear example are parental leave policies, especially leave policies for fathers, also called “daddy quotas”: A non-negligible, non-transferable (“use it or lose it”) share of the parental leave reserved for fathers. The assumption in this third mechanism is that policies can indeed lead to changes in individuals’ behaviour.

### **To what extent has the "daddy quota" made men more caring?**

Kotsadam and Finseraas (2011) have explored the implementation of the so called “daddy quota” in Norway as a natural experiment by comparing parents with children born just after the reform to parents with children born just before it. Results indicate that parents with children born after the introduction of the daddy quota are less likely to experience conflicts over the division of household tasks, and are more likely to share such tasks. Evidence from a comparative study on Sweden, Norway, the Netherlands, Canada, the United Kingdom, Finland and Italy also suggests an increase in father involvement in caring for the child after the introduction of the quota, particularly by highly educated men (Boll et al., 2014). Herlofson and Ugreninov (2014) found that men were more involved in childcare after the introduction of the daddy quota, but not more involved in care for frail parents. Those case studies indicate that policies can indeed lead to changes in individuals’ behaviour, in this case by creating caring fathers and egalitarian partners.

### **Challenges in establishing gender equality in interdependencies inside families**

From the legal point of view, there is a trend towards greater gender equality. Hagestad and Dykstra (2016) have identified a gender convergence in the structuring of interdependence by laws and policies over time in terms of both rights and duties. There are currently no gender differences in the age of majority, age of consent and in the marriageable age in OECD countries, although the actual ages vary across countries. The pensionable age is still different for men and women, in line with the breadwinner model of gender relations: In 2012, 22 EU and OECD countries had a lower statutory retirement age (age at which people gain the right to public old-age pension benefits) for women than men. However, this difference is decreasing as pension reforms are leading to an increasing equalisation of retirement ages.

Yet, everyday practices still point to important gender differences in the use of public provisions. For instance, women are more often recipients of survivors’ benefits (due to gender differences in life expectancy). They are also more often users of care leaves and less often recipients of help at home. Those gender differences are a major challenge for policy makers. In the case of how commonly men use help at home, Schenk and colleagues (2014) have shown that, in the Netherlands, whilst many women actually provide care for their partners, male partners only provide care that complements public care provision. As a consequence, older women with a partner are more dependent upon public care than older men with a partner. Research provides different explanations for these gender differences in caregiving: Apparently women are much less likely than men to indicate that they are overburdened by the care needs of their partners. Another possibility might be that the processing of public care requests is gender biased. Officials might be inclined to perceive older men as less able to provide care to their spouses than vice versa. Finally, men tend to feel like they are more entitled to public support because they perceive themselves as lacking the necessary caregiving skills.

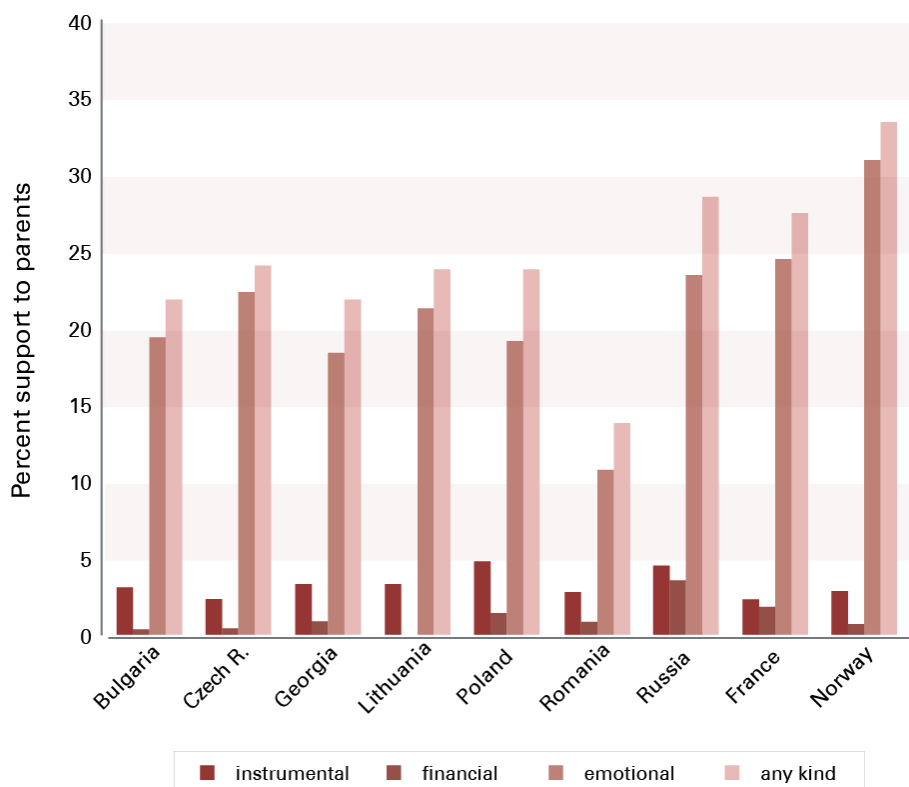
## Transfers to parents – norms of family obligations and actual support provided

By using data from the Generations and Gender Programme for nine countries (Bulgaria, Czech Republic, France, Georgia, Lithuania, Norway, Poland, Romania and Russia), Mureşan and Hărăguş (2015) explored the relation between societal norms of filial responsibility (measured by the individual's values and attitudes toward family and intergenerational relations) and the actual support provided by adult children to their ageing parents. Societal norms of filial responsibility are defined based on the answers to the following statements: "Children should take responsibility for caring for their parents when parents are in need"; "Children should adjust their working lives to the needs of their parents"; "Children ought to provide financial help for their parents when their parents are having financial difficulties"; and "Children should have their parents live with them when parents can no longer look after themselves". In turn, support was measured in terms of instrumental care (regular practical help, personal care or help with daily activities), emotional support (listening to the problems of parents) and financial support (offering money, assets or goods of substantive value for one time, occasionally or regularly).

According to this study, countries with relatively low levels of support from individuals for societal norms of filial responsibility (France and Norway) show higher proportions of adult children who actually support their parents in any form (emotional, instrumental or financial), in comparison to countries with high levels of support for filial responsibility (Central and Eastern European countries, with the exception of Russia. Russia presents a relatively high score for filial norms and also has a high level of support, Figure 4).

When looking at the support for parents by type of support, it can be noticed that most help provided is emotional support (Figure 4). Emotional support is the most common form of help to parents and it shows the largest variation across countries: From 10.9% in Romania to 31.2% in Norway. The proportion offering financial help to parents is the smallest of the three types of support, varying between 0.4% in Bulgaria and 3.6% in Russia. Instrumental help is also less common, ranging between 2.3% in France and 4.7% in Poland.

**Figure 4: Actual support to parent by type (countries by the decreasing mean score of the filial norms index\*).**



**Source** Mureşan and Hărăguş (2016).

**Note** The filial norms index has been constructed based on the answers to the statements mentioned on page 5 of this Policy Brief.

**Graphics** Population Europe

## How does the sandwich generation care for their parents?

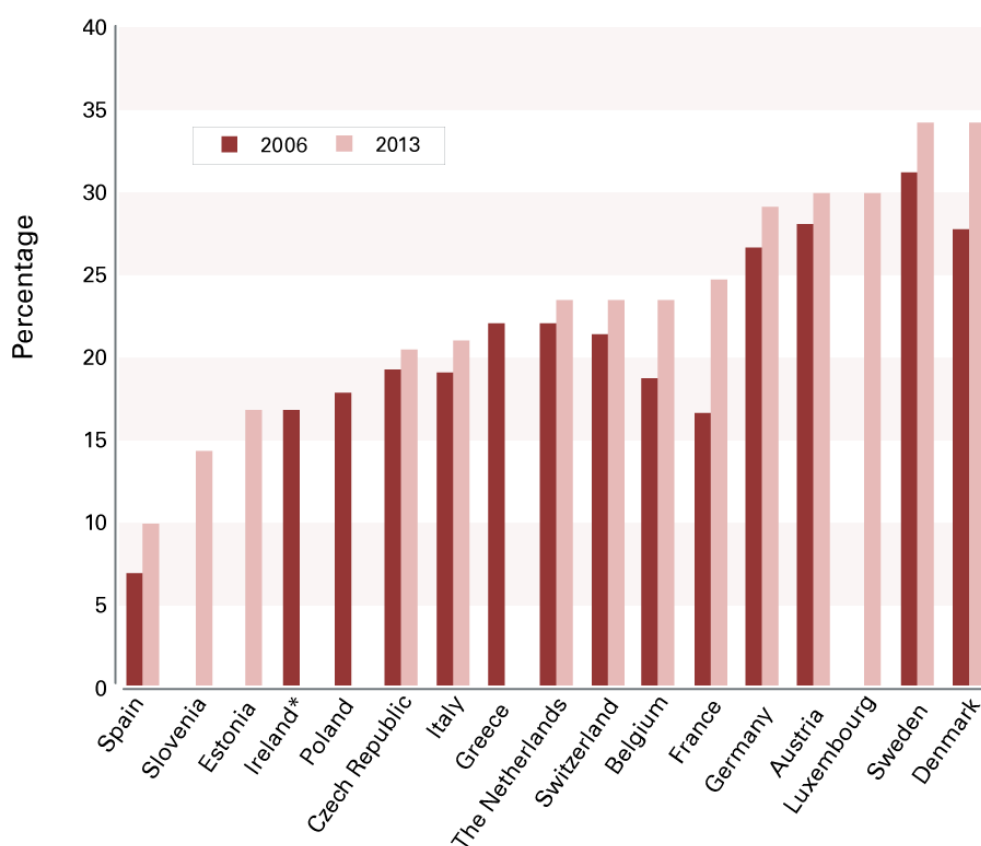
Besides the heterogeneity in actual support to parents across countries found by Mureşan and Hărăguş (2015), family networks remain an important source of support to older parents. Abramowska-Kmon and colleagues (forthcoming) highlight that particular attention should be paid to the so-called “sandwich generation” aged 45-69: They are not only exposed to increased pressures to care for the parents due to population ageing and changes in family structures, but they are also expected to participate longer in the labour market. For this reason, those individuals are increasingly struggling to combine work, family and care responsibilities.

By exploring data from the Generations and Gender Programme for Bulgaria, France, Italy, Lithuania, Norway, Poland and Romania, Abramowska-Kmon et al. (forthcoming) found that the sandwich generation is responsive of the care needs of their parents: The health status of parents is what predominantly determines the care provided. Regarding individual characteristics, more religious and better educated individuals are more likely to provide care for older parents, and employed persons are more likely to provide care for their mothers than unemployed ones. In addition, it has been shown that the sandwich generation is not challenged by providing simultaneous up and down care, but the main burden they face is more about reconciling care for either a grandchild or older parents, one’s own family duties and his or her job. In this sense, initiatives that aim to facilitate work-life balance are of key importance for the sandwich generation (Abramowska-Kmon et al., forthcoming).

## What about transfers from parents to children?

Overall, transfers from parents to adult children also differ substantially across countries in Europe. According to data from the Survey of Health, Ageing and Retirement in Europe (SHARE) for 2006, the proportion of parents financially supporting their children ranged from 7% in Spain to 31.3% in Sweden. As Figure 5 shows, during the years of economic crisis, financial help from parents to children has increased in all countries included in the survey. By 2013, Spain was still the country with the lowest proportion of transfers (9.9%), and Sweden, together with Denmark, had the highest proportion (34.2%). Although support is not frequent in Spain, when it occurs, the amount of the transfer is normally high (Mari-Klose and Escapas Solana, 2015).

**Figure 5: Percentage of parents (older than 50) that provided any financial or material gift or support to a child amounting to 250 Euros or more, 2006 and 2013.**



**Source** Mari-Klose and Escapas Solana (2015).

**Note** \*Data is unweighted.

Questions: Now please think of the last twelve months. Not counting any shared housing or shared food, have you [ or your husband/wife/partner/partner] given any financial or material gift or support to any person inside or outside this household amounting to 250 Euros or more? We have selected only those cases where respondents indicate "Children" to the following question: To whom did you [or your husband/wife/partner/partner] provide a financial gift or assistance [in the last twelve months]?

**Graphics** Population Europe

In the example of Spain regarding intergenerational transfers, the impact of parents in alleviating poverty is quite limited. It is more likely to happen when non-resident children (children who do not live with their parents) are unemployed, or after a divorce. Adult children who are unemployed and not living with parents have a 3.3 times higher chance to receive a transfer of 250 euros or more from their parents in comparison to those who are employed. Individuals who are divorced or not living with a partner have a 58% higher probability of receiving financial support in comparison to



married and cohabiting counterparts. In addition, those with more well-off parents are those with the highest chances of receiving financial support (Mari-Klose and Escapas Solana, 2015).

### **Economic crisis and individuals' attitudes towards social policies – The case of Spain**

In an upcoming study on attitudes towards social policies that are clearly oriented towards a specific age group (support for children, the young and the older population), Pau Mari-Klose (University of Zaragoza), demonstrates that crisis scenarios strengthen the support for policies. Through a survey experiment, different sets of interviewees were asked the extent to which they supported state responsibility for those policies, while being exposed to three different scenarios. In two of them, short messages about the crisis were attached to the question (in one case, putting emphasis on the “hardship” that people are experiencing, in the other on “the need to collect more taxes or get deeper into debt to sustain welfare services”). Other respondents were asked a baseline question with no priming. Results show that when individuals were exposed to crisis scenarios, they tend to prioritise support to groups that are seen as more deserving (older individuals), while those actually hardest hit by the crisis – the young – are less favoured.

## **POLICY IMPLICATIONS AND RECOMMENDATIONS**

- National policies should seek to support intergenerational care regimes without reinforcing gender inequalities.
- Reconciliation of work and care over the life course should be a priority in social policy agenda. More attention should be paid to the interdependencies of care for older individuals and the employment of those aged 45-69.
- Taxes, direct benefits (encompassing in-cash and in-services benefits) and care leaves allowing adult children to care for their parents should be made available by governments. Companies should be encouraged to allow workers to take care leaves, and to guarantee their return to work, independent of their gender.
- Countries should promote and encourage fathers to take parental leave. The “daddy quota” is an example of such a solution.
- In countries where leave schemes for fathers are available, companies should be encouraged to motivate fathers to use their rights.
- Officials processing requests for public care must be aware of possible gender biases when deliberating, as they might be inclined to perceive older men as less able to provide care to their spouses than vice versa.
- Partners should be trained to care for their spouse, at least in cases where their own health is not the limiting factor.
- Countries should improve social protection for young families, particularly those undergoing financial hardship while raising children.

## RESEARCH PARAMETERS

FamiliesAndSocieties aims to investigate the diversity of family forms, relationships and life courses in Europe, to assess the compatibility of existing policies with these changes, and to contribute to evidence-based policy making. The consortium brings together 25 leading universities and research institutes from 15 European countries, three transnational civil society actors and a large number of national and international stakeholders.

The points of departure for the project are that family life courses are becoming more complex and diverse, that individuals' lives are interdependent - linked within and across generations - and that individual life courses are shaped by social contexts and policies. Four transversal dimensions are integrated into the project: gender, culture (ethnic, migrant and cultural identities, sexual orientation), socioeconomic resources and life stages.

The project has four main objectives: To explore the growing complexity of family configurations and transitions across and within European societies; to examine their implications for children, women and men with respect to inequalities in life chances, intergenerational relations and care arrangements; to investigate how policies address family diversity and its consequences; and, to identify likely paths of future changes in family compositions and related policy needs.

The approach is multidisciplinary, combining a wide range of expertise in social sciences, law and the humanities, represented in the consortium. Comparative analyses are being applied and advanced quantitative methods to high quality register and survey data used. Moreover, qualitative studies are being conducted. The project will develop two databases, one on the legal content of family forms available in European countries, and another on EC/EU initiatives on core family policy areas during the last decades.

The project is organized into 12 work packages including management and dissemination activities. Substantive work packages address family configurations, new gender roles, the new role of children and assisted reproductive technology, inequalities in children's life chances, childcare arrangements, intergenerational links, social inclusion/exclusion of migrants, policies and diversity over the life course, and foresight, synthesis and policy implications. All major European regions are represented in the project governance. Together with various stakeholders, government agencies, national and local policy makers, nongovernmental organisations and additional members of the scientific community across Europe, the project will identify and disseminate innovation and best policy practices.

## PROJECT IDENTITY

<b>PROJECT NAME</b>	FamiliesAndSocieties – Changing families and sustainable societies: Policy contexts and diversity over the life course and across generations.
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February 2013 to January 2017 (48 months).

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#### BUDGET

EU contribution: 6.5 million €.

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#### WEBSITE

[www.familiesandsocieties.eu](http://www.familiesandsocieties.eu)

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#### FOR MORE INFORMATION

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#### FURTHER READING

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