
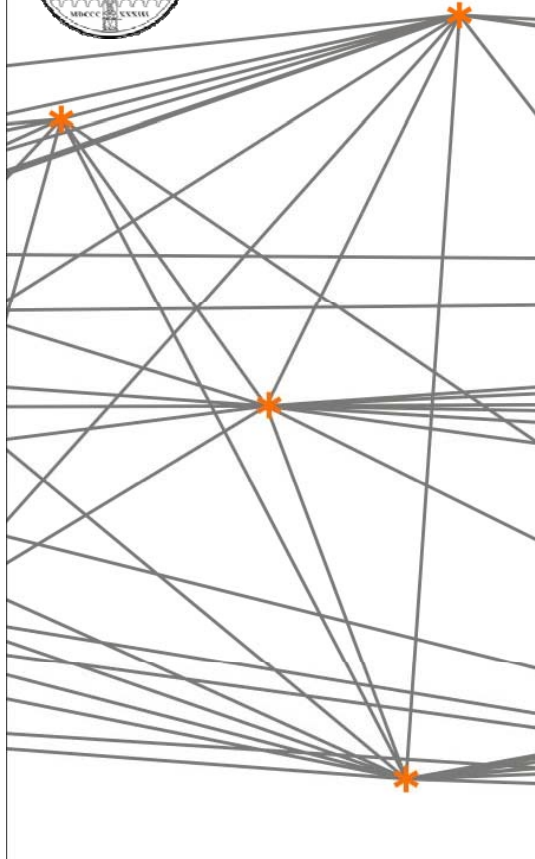


SHARE
Survey of Health, Ageing
and Retirement in Europe



Research Group
Labour, Generation,
Stratification (AGES)



mea
Mannheim Research Institute
for the Economics of Aging

The family and the state

Intergenerational transfers in Europe

Martina Brandt
& Christian Deindl

Malta, March 2010

Outline and questions



- ▶ Why and how study intergenerational support?
 - ▶ Background
 - ▶ Intergenerational transfers
- ▶ Are there European differences in influencing factors?
 - ▶ Welfare regimes
 - ▶ Individual characteristics and family structures
- ▶ How could the state influence private transfers?
 - ▶ Theoretical concepts
 - ▶ Discussion
- ▶ What influences intergenerational transfers?
 - ▶ Occurrence and intensity of transfers
 - ▶ Multivariate models

- ▶ Demographic ageing
 - ▶ Changing intergenerational proportions and relations
 - ▶ More old and less young people in family and society
 - ▶ More overlapping lifetime
 - ▶ Increasing burdens for the young
 - ▶ Pensions
 - ▶ Support
 - ▶ Increasing potentials of the old
 - ▶ More healthy life years
 - ▶ (Better) pensions

- ▶ Aim of the international comparison
 - ▶ (How) can the state influence intergenerational relations?
 - ▶ to meet the growing support needs
 - ▶ to sustain balanced intergenerational relations
 - ▶ prevent „intergenerational conflict“?

Quiz

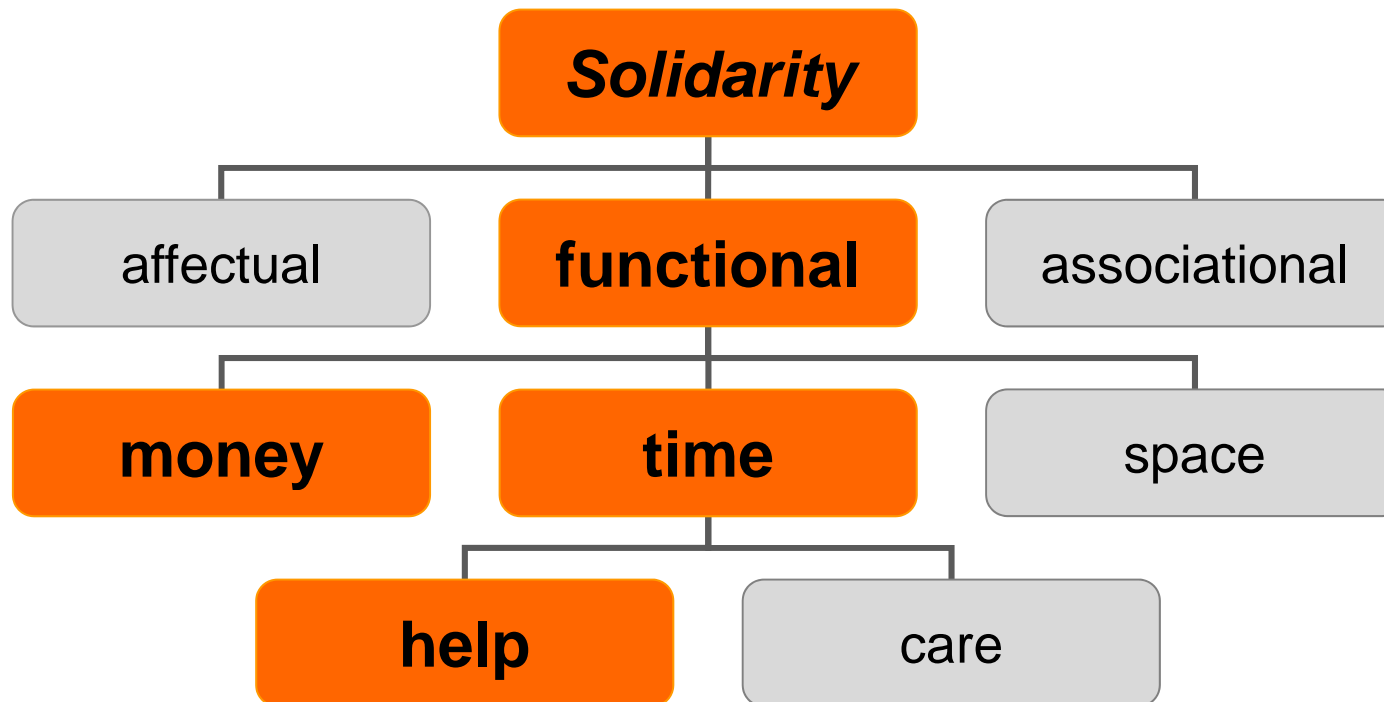


-
- ▶ Please rank the following countries according to the support level you would expect between parents and children:

Austria
Belgium
Czechia
Denmark
France
Germany
Greece
Ireland
Italy
Netherlands
Poland
Spain
Sweden
Switzerland

- ▶ Intergenerational solidarity or „feeling of togetherness“ on the micro-level between (grand-)parents and (grand-)children is a multidimensional construct composed of six dimensions:
 - ▶ Affectual: emotional closeness
 - ▶ Associational: frequency of social contact and shared activities
 - ▶ Consensual: similarity of beliefs and values
 - ▶ Normative: perceptions of obligations and expectations
 - ▶ Structural: demographic factors that affect opportunity for interaction
- And
- ▶ Functional: degree of support exchanged in terms of
 - ▶ Space
 - ▶ Money
 - ▶ Time

May be reduced to three dimensions by separating influences & outcomes



-
- ▶ Time
 - ▶ Care (support with ADL) studied very intensively, but occurs seldom and mostly TO the old
 - ▶ Everyday help (=support with IADL) between parents and children
 - ▶ Immense capacity, not studied intensively
 - ▶ „Ordinary“ transfers as solidarity-indicators
 - ▶ All directions, groups and intensities possible

 - ▶ Money
 - ▶ Transfers to children
 - ▶ Important and frequent form of support in families
 - ▶ Transfers to parents
 - ▶ Not studied intensively, but in some countries still important
-

-
- ▶ Survey of Health, Ageing and Retirement in Europe (SHARE) W2
 - ▶ 40.000 respondents 50+
 - ▶ 14 European countries
 - ▶ Information on social networks, economic situation, health...
 - ▶ ... and life histories (W3)
 - ▶ Download via www.share-project.org

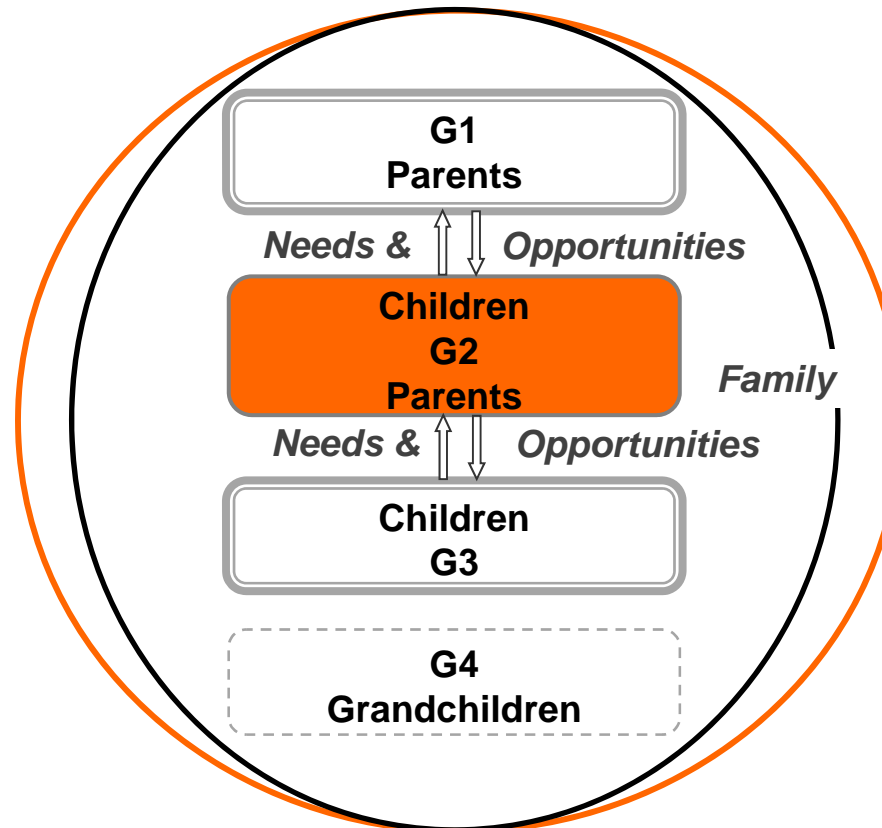
 - ▶ Help
 - ▶ Instrumental Activities of Daily Living (IADL) given and received
Household, gardening, repairs, shopping, transportation, paperwork
 - ▶ Frequency and intensity

 - ▶ Monetary transfers
 - ▶ At least 250 € or more in money or goods given and received
 - ▶ Frequency and sums
-

Influencing factors



Context



European differences



- ▶ European differences exist on different levels
 - ▶ Family
 - ▶ State

- ▶ Family
 - ▶ Relations
 - ▶ Structure/composition

- ▶ State
 - ▶ Social services
 - ▶ Social expenditure

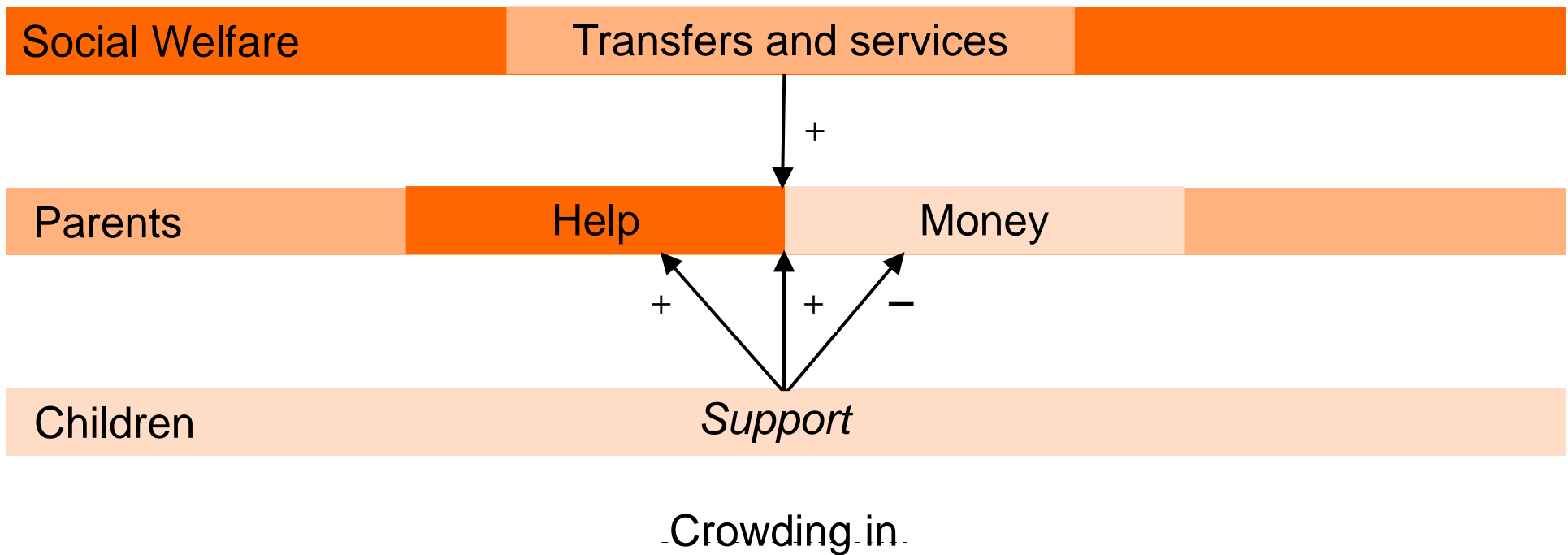
Here, descriptive results will be added:

- ▶ Structure
 - ▶ Number of children
 - ▶ Parents alive
 - ▶ Generations

- ▶ Relations
 - ▶ Living distances
 - ▶ Contact frequencies

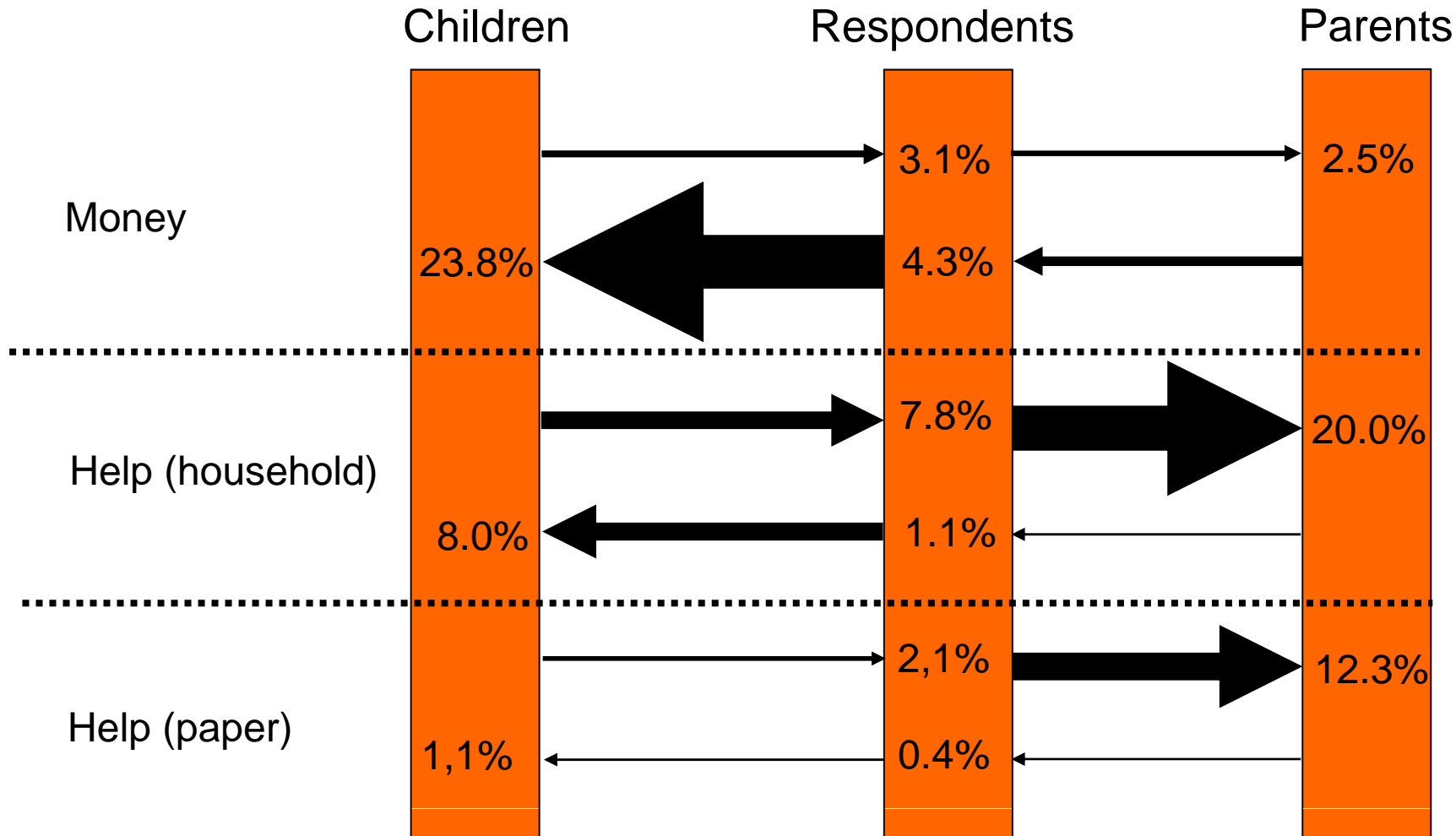
- ▶ Five worlds?
 - ▶ Liberal: market, individual responsibility
 - ▶ Switzerland (partly)
 - ▶ Scandinavian: state, universalistic, redistribution
 - ▶ Sweden, Denmark
 - ▶ Continental: state/market, means tested, status
 - ▶ Netherlands, Belgium, Germany, France, Switzerland, Ireland
 - ▶ South: state/market/family, private networks
 - ▶ Italy, Spain, Greece
 - ▶ East: state/market/family, private networks
 - ▶ Poland, Czech Republic

2002/4	Social expenditure	Social services
SE	8'639.5	18.7
DK	8'153.0	18.0
NL	6'231.8	14.7
BE	7'666.1	12.1
FR	7'827.9	10.1
DE	7'324.0	10.4
AU	7'725.3	8.6
CH	6'311.2	10.7
IR	5'100.0	9.6
IT	6'545.9	6.1
ES	4'809.0	5.6
GR	4'077.6	4.6
CZ	3'500.0	6.7
PL	2'600.0	5.8



- ▶ Four groups
 - ▶ The state crowds out...
 - ▶ The state crowds in... ...intergenerational transfers
 - ▶ The state has nothing to do with...
 - ▶ State and family complement each other

Intergenerational transfers



Here, empirical analyses will be added:

- ▶ Help and money to and from parents
 - ▶ Occurrence in European countries
 - ▶ Multilevel models
 - ▶ Micro & meso influences
 - ▶ Macro influences

- ▶ Help and money to and from children
 - ▶ Occurrence in European countries
 - ▶ Multilevel models
 - ▶ Micro & meso influences
 - ▶ Macro influences

- ▶ Conclusions

Quiz and discussion



- ▶ Who made the right guesses?
- ▶ Did your perspective change because of the workshop?
- ▶ What are the pros and cons you see in an active state?