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CAN WELFARE POLICIES SUCCESSFULLY BREAK THE TRADE-OFF BETWEEN
FERTILITY AND EMPLOYMENT?
A COMPARATIVE STUDY

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INTRODUCTION

The study of how public and social policies may affect and impact society is not only extremely interesting, but also fairly important since these are the instruments at governmental disposal to shape the reality surrounding us. In particular, understanding the role of public policies and their impact on the relationship between fertility and employment appears to be a pivotal task today, especially for those countries which present persistent low fertility. The research question that drove this dissertation is the assessment of whether or not public policies can help women in the conciliation between labor market participation and childbearing. I have decided to respond to such a question through the analysis of previous research in the field of social and public policies, undertaking a comparative approach studying the family policies implemented in Sweden, Italy and France and their impact on fertility. My interest in such a topic derives from different factors. Firstly, I believe that investigating why women everywhere have decided to stop or postpone childbearing is utterly important, since the phenomenon is quite widespread across all OECD countries (despite being more persistent in some countries rather than others) and it may bring about severe consequences for states. Secondly, I believe that it is rather urgent to assess whether there exist policies, implementable by national governments, which may help women's integration into the workforce, without forcing them to give up maternity and vice versa. Finally, I believe that the comparative element will highlight how different countries have chosen to cope with a similar problem, which solutions and policy packages have really had a tangible effect and which ones have proved not to be sufficient. At the same time, the comparison will be useful in showing the reasons behind each different approach to the issue. In the first chapter, I have decided to draw a picture of fertility trends in OECD countries, from World War II until today, focusing on Europe. Having assessed that there has been a general decline in fertility and its consequences in the long-run, I examine the structural and cultural conditions that are thought to have determined such a decline. In the first chapter I also take into account the role of policies in shaping fertility and, in particular, those family policies that are thought to have a positive relation with fertility such as financial transfers, child-related leave entitlements and the provision of childcare services. Subsequently, in the second chapter, I proceed reviewing the work of the main authors in the field of public policies and welfare state analysis. Starting with the mainstream doctrine represented by Esping-Andersen's typology of welfare states, I then continue taking into account the feminist critique. Then, in the second part of the chapter, I take a closer look at the impact of family policies mentioned in chapter one on fertility and employment rates. Finally, in the third chapter, I analyze three case studies namely, the situation in Sweden, Italy and France. I have chosen these three countries because, while Sweden and Italy present opposite situations in terms of policy making and implementation, France represents a mixture of the two countries. Indeed,

while in Sweden policies are conceived on the grounds of gender equality, with high fertility only as a side-effect, in Italy family policies are minimal, emphasizing the centrality of the family and its conception as an institution. Finally, France represents a mixture between the Swedish and the Italian situation, divided between ‘familialism’ and gender equality.

DETERMINANTS OF FERTILITY AND THE ROLE OF FAMILY POLICIES

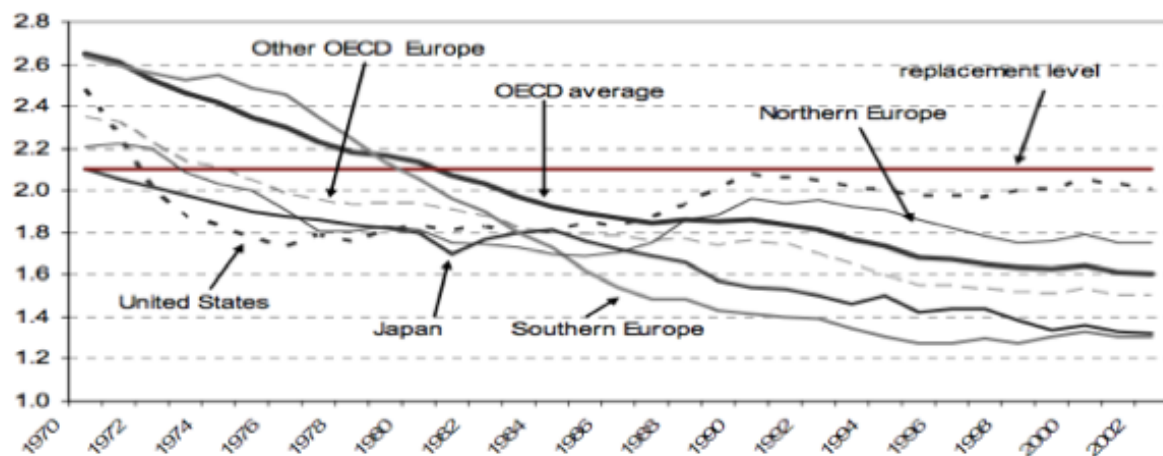
1.1 Introduction

In this chapter, I will firstly show the evolution of fertility trends in OECD countries, examining how fertility has changed over time and pointing out its constant decline over the last few decades. I will then consider the consequences of low fertility for developed countries and analyse the possible causes of the phenomenon. In particular, I will focus on the changes in women's education, income, labour market conditions, family composition and cultural shifts that have led to a revaluation of the role of women as caregivers within the family and society at large. Finally, having assessed that it is in a country's interest to incentivise fertility, I will examine the different welfare policies that can be adopted in order to reach such purpose. In particular, I will describe financial transfers (cash benefits and child-related tax advantages), child-related leaves, entitlements and childcare services.

1.2 Fertility trends

As predicted by the Demographic Transition Theory, in the last decades, European countries and North America have entered the so called 'Stage IV', which is characterized by a decline in both mortality and birth rates with stationary population at a low level. Indeed, "total fertility rates declined dramatically over the past few decades, falling from an average of 2.7 children per women of childbearing age in 1970 to 1.6 in 2002" (D'Addio and d'Ercole, 2005). However, it is important to note that the decline in fertility rates did not affect all countries equally. Indeed, "In Nordic countries, [...], the decline started early, but came to a halt in the early 1990s, stabilizing at a level of around 1.8. Southern European countries, conversely, have shown a decline in fertility rates beginning in the mid-1970s, but have now [in the early 2000s] reached an extremely low level of 1.3 children per women, the same level as recorded in Japan and Korea" (D'Addio and d'Ercole, 2005).

Figure 1. Trends in total fertility rates in OECD countries



Source: (D'Addio and d'Ercole, 2005)

Despite the fact that since the early 2000s there has been a slight increase in fertility rates among many OECD countries, “the overall rise is rather limited, with a total fertility rate (*TFR*) that reached a low of 1.63 in 1999 before rising to 1.71 in 2008, on average, in the OECD countries” (Luci and Thévenon, 2012). Moreover, recent studies have shown that the 2008 recession and the consequent increase in unemployment have had an impact on fertility rates in the majority of the European countries, even if the magnitude of the impact has differed from a country to another, affecting especially those that had reported a slight increase in fertility during the previous years (Goldstein et al., 2013). According to Eurostat, in 2015, the total fertility rate in the 28 members of the European Union was 1.58, confirming that the fertility rate lays below the so-called replacement level, which “would ensure the replacement of the previous generation, and therefore population stability, under assumption of no immigration and of no change in mortality rates” (D'Addio and d'Ercole, 2005). The replacement level is estimated to be equal to a fertility rate level of 2.1.

1.2.1 The consequences of low fertility rates

As highlighted by many researchers, a smaller population size may bring about some benefits, especially for what concerns the environment. However, the problem of a decline in fertility seems to lay not so much in the population's size but rather in its structure (Sleeboos, 2003). Indeed, an ageing population with no replacement will lead to an increase in the dependency ratio: “as the proportion of older persons in the overall population rises by more than the declines in the share of children, the ratio between the dependent population and that of working age increases” (Sleeboos, 2003). Indeed, projections predict that “the OECD population over 65 years of age, as a percentage of the total population, is expected to increase from 15% today to 25% by 2030. Over the same time-period, the

share of those aged more than 80 is projected to increase from 3.5% to 7.5 %. The ratio between the population above 65 and that of working age is projected to increase from 23% today to 42% in 2030” (Turner *et al.*, 1998). The consequences of a decline in fertility are going to affect individuals as well as governments. A reduction in the working age population will reduce output growth and thus, the growth of real GDP. This may lead to a reduction in the size of the economy with respect to developing countries with a consequent shift of power in the international arena. Moreover, per capita income will also decline and the situation will be aggravated by the fact that fewer workers will have to support a growing number of retirees through contributions for pensions, caring and health care services. This will, in turn, put greater pressure on government’s budgets and higher public spending will increase the public deficits and favour debt. In addition, there are also several other subtler, but still important, consequences in the reduction of fertility. Indeed, a larger number of people will have no family ties and will be obliged to rely on public and private services for care. Moreover, there will also be a change in the nature of intergenerational ties, with possible tensions between a minority of poorer and more precarious youngsters and “larger and healthier groups of elderly persons at the top of hierarchical organizations” (Sleeboos, 2003). Thus, it is important to try to understand the reasons associated with such a decline in fertility and whether it is possible for governments to shape the reality differently through the aid of public and social policies.

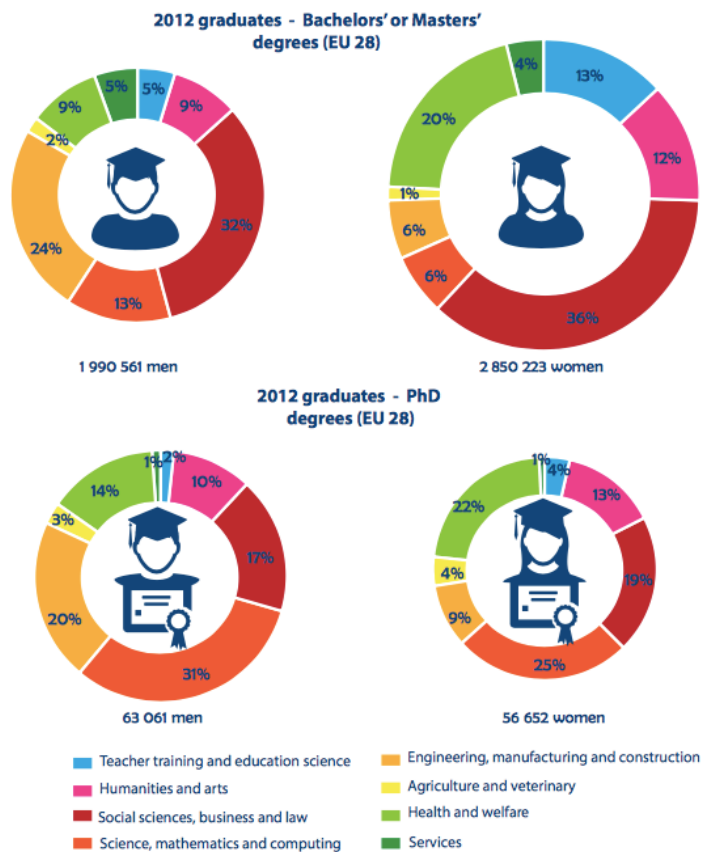
1.3 Structural and Cultural Conditions that influence fertility

When considering the fluctuations of fertility rates, it should be underlined that each country is affected in its own way by structural and cultural conditions that influence individuals’ decision-making concerning childbearing (D’Addio and d’Ercole, 2005). Even if not all demographers agree on the weight that has to be attributed to each factor and despite the difficulty for researchers to come up with defined outcomes regarding the relation of such factors to fertility, in the next section I will briefly examine the role of education, income, labor market conditions, family disruption and cultural changes in influencing fertility. Let us now focus on the structural conditions that influence fertility in developed countries.

1.3.1 Education

Firstly, education should be considered. Indeed, the rate of educated women has increased enormously in the last decades. Women are today more educated than those of the last generation, and, as shown in the subsequent graph, they outnumber men in completing higher education. The graph, however, highlights the problem of gendered studies, with men prevailing in scientific sectors and, also, in undertaking PhDs.

Figure 2. Levels of attainment of Bachelor's, Master's and PHD's by gender

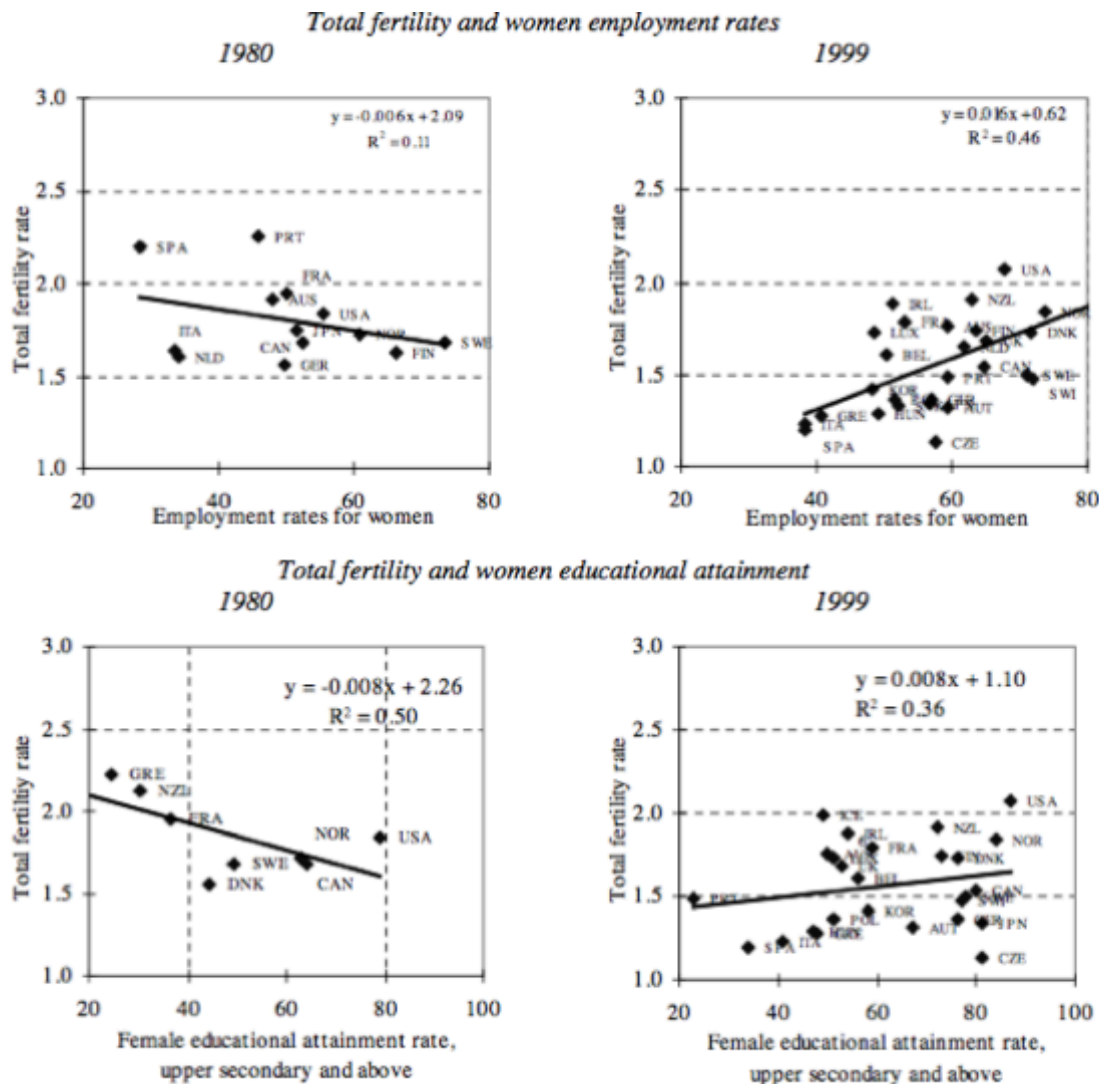


Data source: Eurostat.

The increase of women completing higher education is partly due to a cultural shift that has allowed women to contradict traditional cultural norms and enter in the labour market with the aim to pursue a satisfying career. Nevertheless, the relationship between education and fertility rates has been highly debated. In the past, data showed a negative correlation between women in tertiary education and fertility rates. This data was explained through the socio-economic theory and the gender inequality theory. According to the former, “women’s increased economic independence, which is achieved through improved education and higher labor force participation, reduces the gains from marriage based on the interdependence of the traditional gender division of labor in the family, and increases the relative costs of childbearing” (Testa, 2014). Conversely, the gender inequality theory, postulated by McDonald (2000) suggests that low fertility results from a mismatch between the gender equity granted in individual-oriented institutions and inequity in family-oriented social institutions. So, if on one side women have had the same opportunities as men in terms of education attainments and career perspectives, on the other side, their position within the family has remained unchanged. Nevertheless, being more and better educated, women have become empowered in decision-making regarding household work and fertility, questioning traditional roles (McDonald, 2006). Ever since the 1990s, the negative correlation between fertility and education was questioned

by some studies, which presented it as actually positive, showing an increase in fertility rates in those countries in which women are highly educated. For instance, D'Addio and d'Ercole (2005) have shown how the decline in fertility, despite being common for women of all degrees of education, is actually stronger for the less educated ones. This change of sign is pictured by Figure 7, in which it clearly appears that, while in 1980 fertility was lower for high levels of labor market participation and education, in 1999 the situation is the opposite (Sleebos, 2003).

Figure 3. Fertility, women employment and education



Source: (Sleebos, 2003)

These findings seem to suggest that the issue at stake is not women's level of education but whether they are able to combine their career perspectives with childbearing (Brewster and Rindfuss 2000). Despite the difficulties in determining the type of correlation between education and fertility, it is important to note that higher education achievements lead to an increase in the mean age of first childbirth, which, in turn, reduces the number of years left to have additional children. Postponement

of childbearing is indeed extremely frequent for highly educated women and it may increase the chances to have less children than desired or remain childless (D'Addio and d'Ercole, 2005).

1.3.2 Income

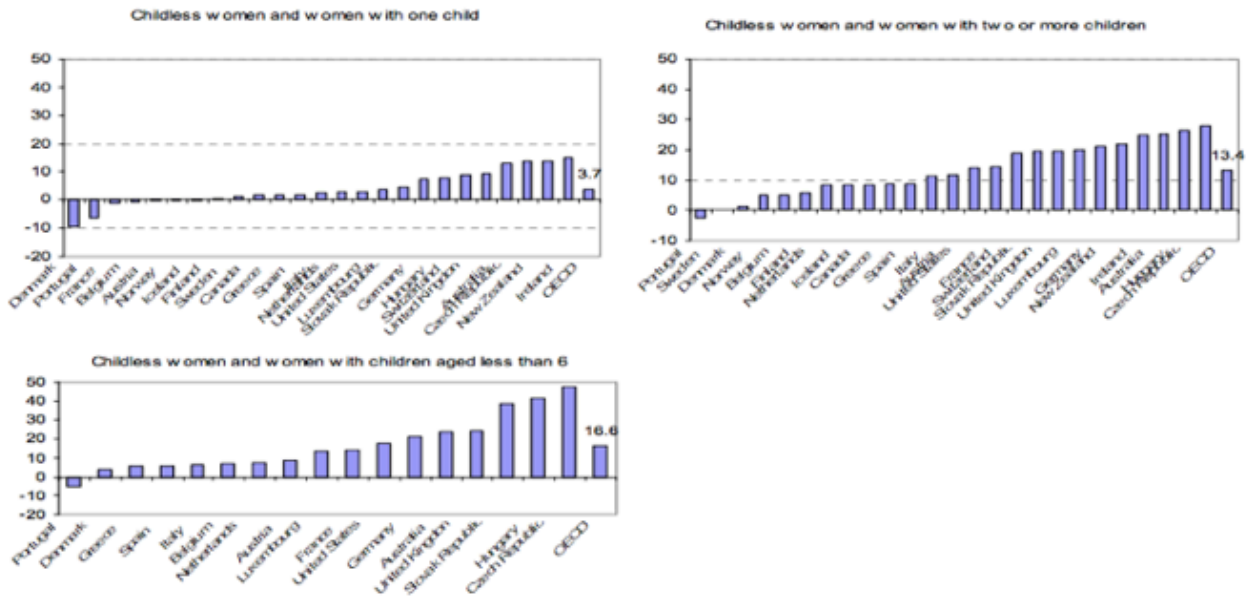
Income is also an important factor in influencing women's behavior with regards to fertility. Even if it is quite difficult to clearly identify the relationship between income and fertility rates, two theories have tried to make sense of it. On one hand, the Easterlin theory suggests that, in order to predict fertility, the focus should not be on absolute income but, rather, on income relative to that of the parental generation. Hence, the analysis should be based on cohorts, meaning groups of people divided by common characteristics such as age. Indeed, "decisions on childbearing and family formation are made based on the expected income and standard of living which depends on current income and expectations on the future. These expectations of the future are in turn shaped by labor market conditions, like competition or possibilities, and by the standard of living of the parents [...]. Fertility is higher in a setting where the future income is expected to be higher, because children are easier to finance. How these expectations are formed, depends on the relative cohort size. If the own cohort is relatively large, expected future income is lower due to a more competitive labor market. Consequently, fertility will be lower due to relatively lower wages and standards of living. The opposite holds true if the cohort is relatively small" (Reibstein, 2017). On the other hand, the Economic Theory of Fertility developed by Gary S. Becker, postulates that the number of children a family is willing to have depends on economic factors such as prices, income, the ability to produce children, cost of children, preferences and taste (Reibstein, 2017). In these terms, the focus of the analysis seems to be on the costs, both direct and indirect, of having children. While direct costs are identifiable as clothing, food, medical care, etc., indirect costs are harder to define, but they are generally identified with "the opportunity cost of parents or the value to parents, [especially mothers], of foregone opportunities in having an additional child" (Reibstein, 2017). "The value of time is important when families decide how they allocate their time between market and non-market activities. Assuming that children are more time-intensive than other commodities, an increase in the value of time has a strong negative impact on fertility decisions of a family. To measure the value of time for women, the wage rate can be used. The higher the wage rate, the higher the opportunity costs when having a child. But, [...], families maximize their utility under a budget constraint which is equal to the family income. Thus, the increase in the value of time is not only negative for the number of children a family decides to have, but also an increase in the value of time for men and women alike impacts positively on the income of the family, raising the possibilities to childbearing. There are two effects that work alongside. On the one hand, there is the price effect, depressing the number

of children due to higher earning potential of parents, and the income effect, increasing theoretically the number of children via more supply of resources that can be spent on children and other consumption goods” (Reibstein, 2017). Thus, the price and the income effects interact with each other, and, by determining the prevailing one, it will be possible to assess the number of children a family is willing to have. However, as researchers have pointed out, to assess whether the fertility of the family will increase, decrease or remain constant, the specific circumstances in which each family finds itself have to be considered. Such a theory is based on the assumption that people decide over childbearing after undertaking a rational costs-benefits analysis. However, many have pointed out how people are actually not aware of all costs and benefits of having a child and often rely solely on their future orientation. If they believe that the future is uncertain (because of the economic, social or personal factors), they are going to assume a risk avert behavior and postpone or forego childbearing (McDonald, 2000).

1.3.3 Labor Market Conditions

Labor market conditions also play a role among the structural conditions that seem to influence fertility. Since higher educational attainment has led to higher labor market participation, women are confronted with the difficult task to balance out work and family life, especially considering that women still bear most of the burden of unpaid work performed in the household. Indeed, data from OECD (2001) show that “mothers having full-time jobs spend on child care more than twice as much time as fathers, and about twice as much on other unpaid work” (Sleebos, 2003). Moreover, it should be considered that the presence of children does impact for the worse women’s career opportunities. As shown by Figure 15, women who do not have children have higher employment rates than those who have one child, two or more children or a child aged less than six. Clearly, the gaps vary from a country to another. For instance, while in Sweden the difference in employment rates between childless women and women with one child is extremely small, in Ireland is quite high.

Figure 4. Difference in employment rates between women aged 15 to 64 with and without children



Source: (D'Addio and d'Ercole, 2005)

However, it is important to note that the presence of children impacts women's career opportunities also in relation to age. Indeed, childless younger women have higher employment rates than childless older ones, but this gap declines as the number of children increases. This means that also younger women get penalized career-wise if they start having children, as is it reported in Figure 16.

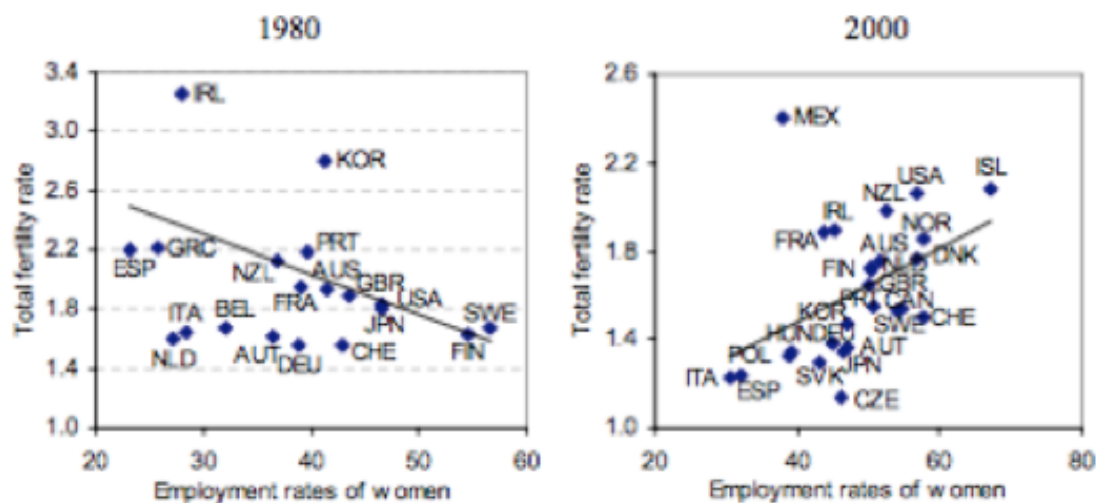
Figure 5. Employment rates of women of different ages with and without children, selected European countries in 2003



Source: (D’Addio and d’Ercole, 2005)

The data presented clearly suggests that, while in some countries the number of children does not matter when it comes to labor market participation and women are relatively free to work as much as they can or want to, in other countries, if women want to increase their participation in the labor market, they are forced to decrease their birth rates (D’Addio and d’Ercole, 2005). When it comes to the relation between female employment and fertility rates many studies have assessed that, at an individual level, there seems to be an inverse relationship between fertility rates and labour market participation. However, in recent years, several authors underlined how “the sign of the cross-country correlation between female employment rates (or labor force participation rates) and total fertility rates has changed” (D’Addio and d’Ercole, 2005). This change is probably due to the fact the traditional ‘male breadwinning model’, that underpinned the public and social policy packages of many OECD countries, is changing and mothers are no more considered the primary caregivers as fathers are no more considered the only breadwinners of the family. As reported by D’Addio and d’Ercole (2005) in Figure 13, “in 1980, OECD countries where female employment rates were lower recorded higher total fertility rates (left-hand panel). By the year 2000, countries with a lower female employment rate recorded a *lower* fertility rate than countries where paid employment for women is more common”

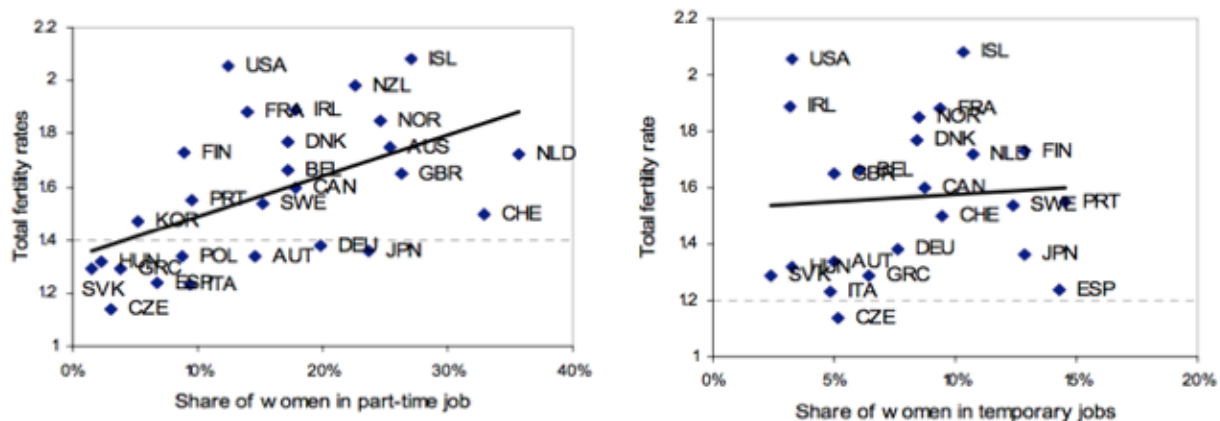
Figure 6. Cross-country relation between female employment rates and total fertility rates, 1980 and 2000



Source: (D'Addio and d'Ercole, 2005)

Hence, it seems that we are confronted with a paradox according to which employed women have, within each country, lower fertility rates than those unemployed but, at the same time, countries where women's participation in the labor force is higher, have higher fertility rates than others. This paradox is explicable when we consider how, in each country, women manage to combine work and childbearing (D'Addio and d'Ercole, 2005), also taking into account that “the fertility rebound has been steeper in those highly developed countries where women's labor market participation has also risen significantly. This suggests that the impact of economic development *per se* is small, unless accompanied by better opportunities for women to combine work with family life” (Luci and Thévenon, 2012). Moreover, as shown by Sleebos (2003), the type of job that is available to women also matters in fertility decisions. In particular, part-time jobs are preferred by working mothers because they facilitate the combination of work and family. Indeed, in the year 2000, total fertility rates were higher in those countries in which the majority of women held a part-time job. Regarding women with temporary jobs, their experience is rather varied, but total fertility rates remain quite low (D'Addio and d'Ercole, 2005).

Figure 7. Cross-country relation between women in part-time and temporary jobs and total fertility rates, 2000



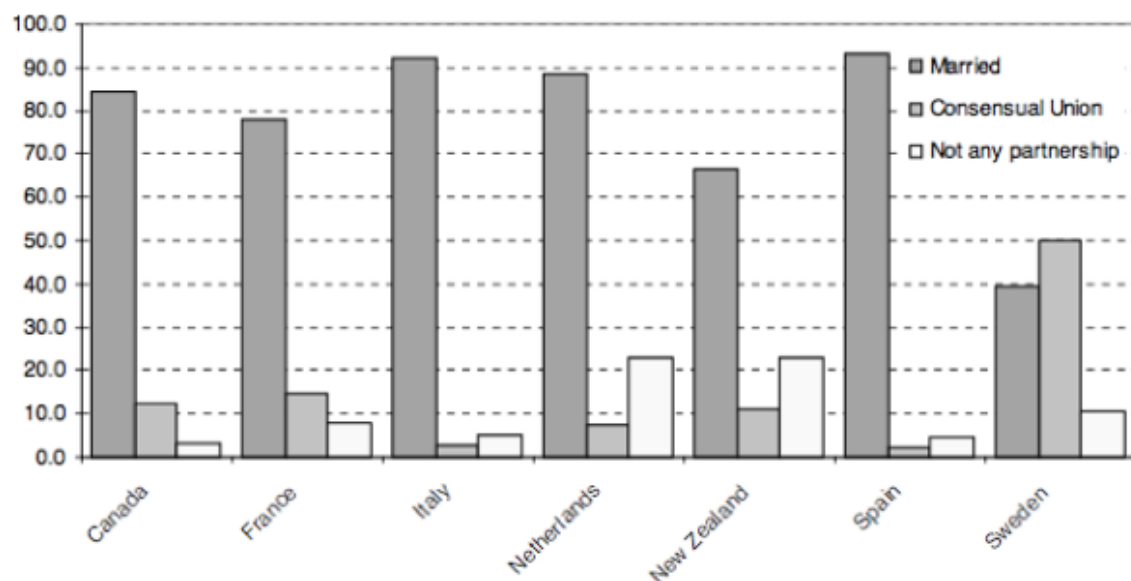
Source: (D'Addio and d'Ercole, 2005)

Finally, unemployment also influences fertility trends and, generally, fertility rates are higher where unemployment is lower. Indeed, high unemployment may lead youngsters to extend their permanence in their parents' house or their studies postponing their entrance in the labor market and childbearing. However, researchers have noted that sometimes unemployment may also push women to have children, since, being unemployed, they faced reduced opportunity costs of childbearing (D'Addio and d'Ercole, 2005).

1.3.4 Family composition

According to researchers, another factor that may explain the decline in fertility is the change in family composition and the weakening of family ties. The traditional idea of family has indeed lost its prominence and appeal in many European countries, especially the Nordic ones, where cohabitation or lone parenting have become well-consolidated realities. However, it should be noted that, as shown in figure 15, in general "the proportion of mothers that, at the time of their first births, were married is much larger than the corresponding proportion among those living in consensual unions and, even more so, without any partnership" (Sleebos, 2003).

Figure 8. Partnership status of mothers at first birth



Source: (Sleeboos, 2003)

Interestingly, the countries in which there is a higher proportion of non-married mothers are those with higher fertility. That is probably due to different factors, ranging from specific religious and cultural orientations to the existence of legal provisions in favour of non-married mothers and children living outside marriages. Overall, it is worth noticing that while it is difficult to find a causal relation between the proportion of non-married women and fertility, “they provide a warning against the assumption that higher marriage rate is a necessary condition for increasing fertility, and suggest that marriage laws that are more neutral with respect to the form of relationship may be an important condition for sustaining fertility” (Sleeboos, 2003).

1.3.5 Cultural shift

Beside structural conditions, also cultural factors play a role in constraining fertility. Indeed, “higher educational attainment and labor market participation among women have fuelled the diffusion of new values — such as autonomy and financial independence — among younger cohorts of women, and greater awareness of the “incompatibility” between professional and family roles that still characterise many OECD countries” (D’Addio and d’Ercole, 2005). The cultural shift is proven by the data from the 2000 wave of the World Values Survey, in which women in the age cohorts of 15-34 and 35-50 were presented with some statements regarding “the traditional role of women in families and society” (D’Addio and d’Ercole, 2005). These statements included: i) “when jobs are scarce men should have more right to work than women”; ii) “marriage is not an outdated institution”; iii) “women need to have children to be satisfied”; iv) “disapprove women as lone parents”; v)

"working mothers cannot have the same warm and stable relation with children"; and vi) "being a housewife is as fulfilling as working in paid job". Results have shown that overall the youngest cohort of women appeared to agree less with all the statements with respect to the older cohort.

1.4 The Role of Policies

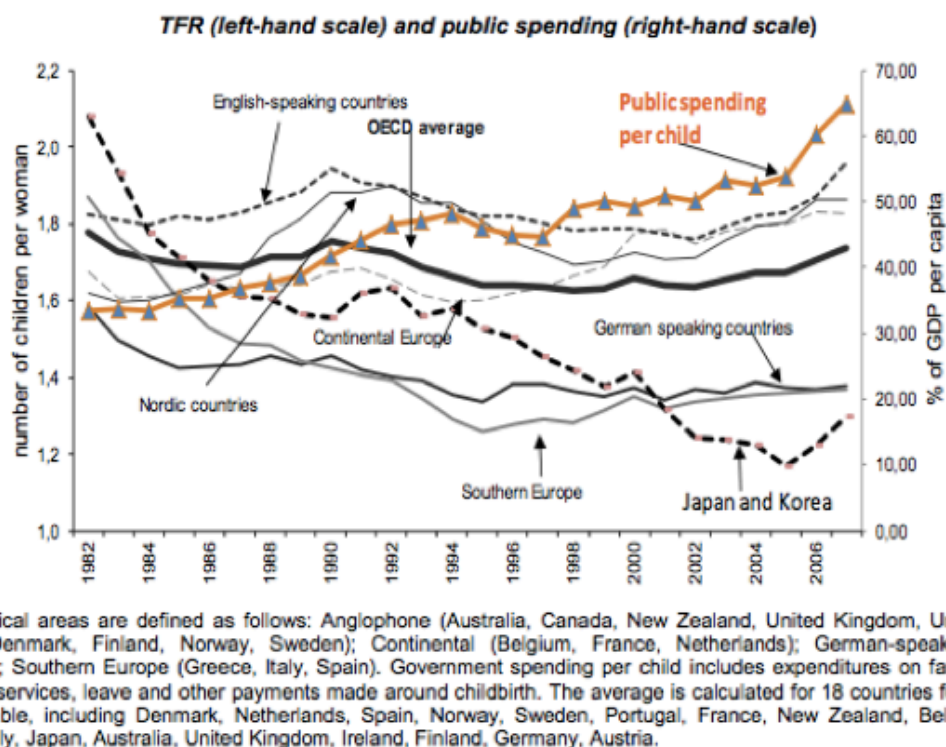
Since, as we have seen, the potential consequences of long term low fertility rates may be detrimental for both governments and individuals, it would seem to be in the governments' interest to adopt policies which may incentivize and foster fertility. Because of the many variables that influence individuals' willingness to have children, it may appear difficult to precisely identify a policy package that will lead to an increase in fertility. However, Gauthier ((Gauthier, 2002) defines family policies as a mix of policies that are directed to families with children with the purpose of increasing their level of well-being. Still, there are many policies that may increase a family's well-being, such as those concerning employment, transport, education, health care, etc. However, the literature takes a 'narrow' stand in defining family policies and only considers "financial support for families, services and benefits for working parents, policies related to health and education and family law" (Gauthier, 2002). In the next section, I will briefly define and describe cash benefits, child-related tax benefits, child-related leave entitlements and childcare services, which are the policies with the potential to relieve parents from both the direct and indirect costs of childbearing and, thus, increase fertility.

1.4.1 Government spending and Fertility trends

Assuming, as postulated by the Economic Theory of Fertility, that, when deciding whether or not to have children and in which quantity, individuals consider the costs (both direct and indirect) of childbearing in relation to their disposable income, then, a policy that aims at increasing and fostering fertility, should reduce the direct costs making the income effect (higher income will make the demand for children increase) prevail over the price effect. Moreover, it should be considered that, in order to also reduce the indirect costs of having children, which are usually borne mostly by mothers, policies should aim at a redistribution of such costs within the family and society. In this way, the double goal of higher female employment and higher fertility rates could be reached. (D'Addio and d'Ercole, 2005). Bearing in mind that each country focuses on certain policies rather than others, according to the objective they want to pursue, and that fertility is not always the main goal, let us focus on countries' level of spending for families. Generally speaking, over the past three decades, family spending has increased in the majority of the OECD countries. Indeed, "the share of GDP spent by governments for families – disregarding expenditures on compulsory education – rose from an average of around 1.6% in 1980 to 2.0-2.4% in 2007 in the OECD. Yet, cross-country differences

in the total amount transferred to families remain large” (Luci and Thévenon, 2012). In particular, differences across countries are striking when considering the amount and extent of support provided to working parents with children under three. In this case, the Nordic countries (Denmark, Finland, Iceland, Norway, and Sweden) are those that give the greatest support, both financial and in-kind, to such families. The English-speaking countries (Australia, Canada, Ireland, United Kingdom New Zealand, and the United States), on the contrary, privilege means-tested financial support, targeted on low-income families and on preschool children. Finally, Continental and Eastern Europe may be considered to have a more intermediated position, with the exception of France and Hungary, which stand out for the generous support granted to working parents with young children (Luci and Thévenon, 2012). Figure 5 shows the fertility trends across OECD countries since the early 1980s in relation to government spending for families. Those countries where fertility has declined (Japan, Korea, the German-speaking countries and in southern European countries) also saw a decline of public spending for families. By contrast, there has been a fertility rebound in countries of Continental and Nordic Europe, and in English-speaking countries. This rebound has been paralleled by an increase in government expenditure (Luci and Thévenon, 2012) and “in some cases, this rise started to accelerate slightly before the fertility rebound, suggesting that the development of family policies played a positive role” (Luci and Thévenon, 2012).

Figure 9. Total fertility rates and average government spending for families



Source: (Luci and Thévenon, 2012)

1.4.2 Financial transfers: cash benefits and child-related tax advantages

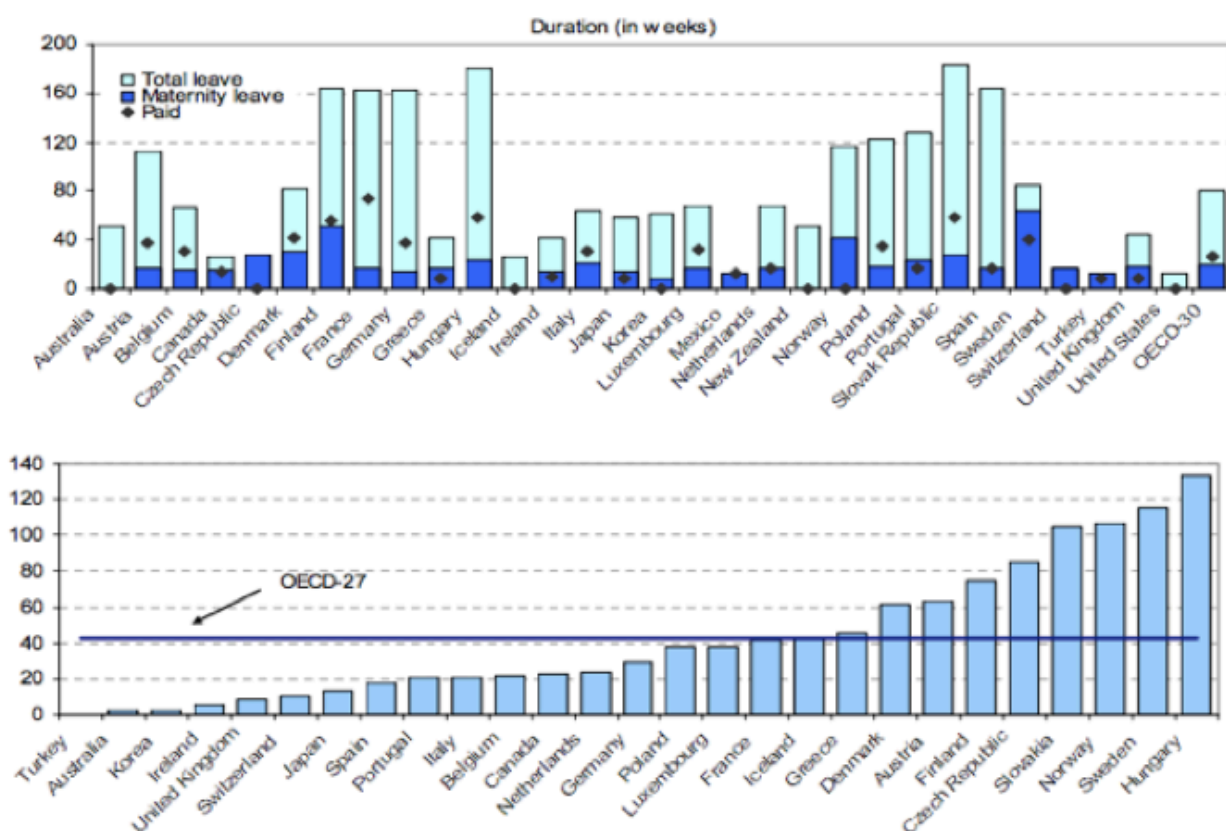
When taking into account financial transfers, it should be considered that financial support can take two forms: cash benefits or child-related tax advantages. This form of support exists in almost every country but it varies a lot from a system to another in terms of who the beneficiary is, whether the benefit is means-tested or universal and, in general, for what concerns eligibility criteria (D’Addio and d’Ercole, 2005). Cash benefits can be defined as a sum of money “paid out after a birth, in the form of birth grants or payments to parents who take leave from employment after a birth. Other benefits are received by parents on a regular basis. They mainly include family allowances, child benefits or working family payments” (Luci and Thévenon, 2012). Some countries also include further benefits such as school supplements or provisions regarding housing. Overall, cash payments represent the main expenditure by governments, which spend on average 1.25% of GDP. However, it is worth noticing that expenditure for child benefits has actually decreased in many countries over the last decade. Child-related tax advantages are also quite common (they are in place in 26 out of 32 OECD countries) and include “tax allowances on earned income, tax credits or tax deductions for services such as childcare” (Luci and Thévenon, 2012). Despite being an extremely popular measure, their role in supporting families is different from a country to another depending on the specific characteristics of each system. For instance, while in Southern Europe, where there is lower women’s

participation in the labor force and childbearing is tightly linked with marriage, tax benefits result to be a way to support dependent spouses and are granted to the male breadwinner. On the contrary, in Nordic countries, where female participation in the labor market is quite high, tax benefits have been beneficiary for the financial autonomy of all individuals.

1.4.3 Child-related leave entitlements

Child-related leave entitlements are another category of parental support. Leave entitlements can usually be divided into three categories: maternity leave; paternity leave and parental leave. They have different length and can usually be combined together. The aim of such a measure is to protect one's work position while parents take some time off of work to take care for their children. Ever since the 1970s, maternity leave was granted in the majority of countries (nowadays the United States and New Zealand are the only countries that do not provide any kind of parental leave). Duration of the leave differs from country to country but maternal leave is usually built so to allow mothers to take time off right before and after the birth of a child. Maternity leave is paid and allows mother to preserve their employment and their position while away. Similarly, paternal leave is the possibility for fathers to take some time off to look after their newborn child. It usually lasts less than maternal leave and it is actually not so popular among fathers. One of the reasons could be that since leave payments "do not fully replace the leave-taker's salary, and since women very often earn less than their partners, they are more likely than men to take all or the majority of the leave entitlement" (Luci and Thévenon, 2012). Moreover, it should also be considered that leave policies are highly dependent on socio-cultural attitudes, hence, in those countries in which it is considered that the mother should have a prevailing role in taking care of the children, maternity leave provisions tend to be stronger (D'Addio and d'Ercole, 2005). Finally, "parental leave refers to longer periods of leave for either or both parents, to be taken after maternity and paternity leave" (Ray, 2008) when the child is older. It should be considered that parental leave is usually used more by women rather than men. That is also due to the aforementioned salary gap that pushes men to avoid paternal leave and to socio-cultural attitudes. This also implies that women remain absent from work for a longer time with respect to men, making them less competitive and making the opportunity costs of childbearing quite high (Luci and Thévenon, 2012).

Figure 10. Parental leave provisions in selected OECD countries, 2002



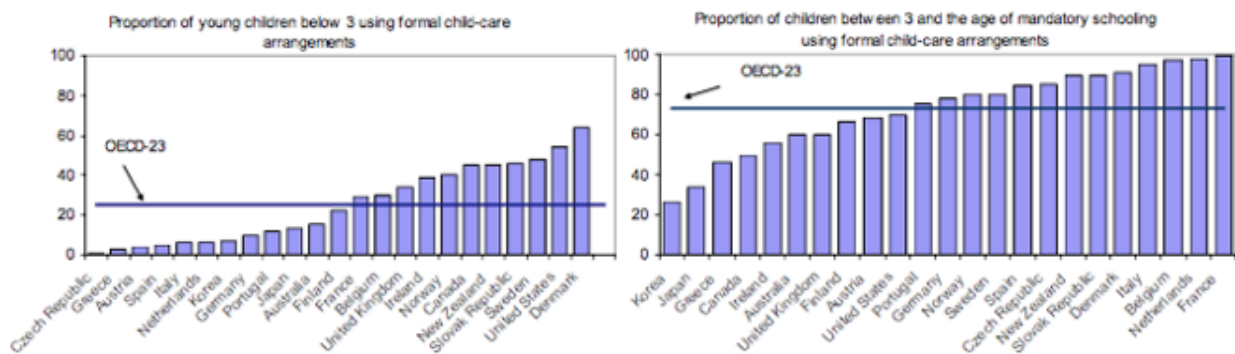
Note: Benefits per birth are computed by dividing total spending on benefits for maternity leave by the number of births in each country. They are subsequently expressed as a percentage of the APW wage.

Source: (D'Addio and d'Ercole, 2005)

1.4.4 Childcare services

Finally, the provision of childcare services should be considered. Childcare services are in-kind benefits provided to families to relieve them from childbearing and allow parents to combine family and work. While the average OECD expenditure for these types of services is about 0.9% of GDP, some countries have invested a good amount on childcare services. For instance, Denmark, France, Iceland, Finland and Sweden spend over 2% of their GDP in in-kind services and studies have shown that countries where childcare costs are lower for the family, because borne by the government, present a higher fertility rate (D'Addio and d'Ercole, 2005). Nevertheless, high expenditure is not enough. Indeed, studies have shown that, for childcare services to perform well, availability and quality are the most important factors. When childcare services lack availability and quality, parents may prefer to rely on grandparents' assistance or on informal care. Figure 25 shows the share of children in OECD countries that attend formal childcare arrangement before and after the age of three.

Figure 11. Share of children of different ages attending formal childcare arrangement



Source: (D'Addio and d'Ercole, 2005)

1.5 Conclusion

In the first part of this chapter, I have shown how fertility has developed in OECD countries over the last few decades. Subsequently I have discussed those factors that have an influence over fertility, differentiating between structural and cultural conditions. In particular, I have examined the effects of education, level of income, labor market conditions, family disruption and formation and the cultural shift of gender roles and norms that has characterized western societies. While the correlation between all these factors and fertility is not always clearly defined, research has proved the intervention through family policies to be essential in order to overcome low fertility, whose effects may be devastating for the future of countries. In the second part of the chapter, I have described all those policy instruments that may be used in order to increase fertility facilitating childbearing, presenting general definitions of such instruments and some data regarding their usage in OECD countries. In the next chapter I am going to examine more their effectiveness in greater detail through a literature review of previous research.

WELFARE REGIMES AND FAMILY POLICY

2.1 Introduction

In the following chapter, I am going to review the existing literature regarding welfare state and family policies. I am going to begin by reviewing Esping-Andersen's famous welfare state typology, which represents the pivotal starting point to better understand the different policy approaches of European countries. I am then going to take into account the feminist critique of such a typology, which was essential in achieving the inclusion of women in welfare state studies and the development of a feminist literature in the field. The feminist objections to the mainstream theories represent an important moment for women as they were starting to be incorporated in the analysis of public policies as individuals (rather than wives, widows or daughters) and according to their own needs. Finally, I am going to approach the literature that specifically concerns family policies. I am firstly going to present the challenges that researchers face in this domain and, subsequently, the main streams of studies produced until now and their efficacy. I am going to conclude this chapter presenting some of the most salient findings regarding the impact of family policies on fertility.

2.2 Welfare State Typology

The most authoritative classification of welfare state regimes was produced by Esping-Andersen in his seminal work 'Three Worlds of Welfare Capitalism' in 1990.

In this book, the author defines the welfare state as involved in "securing some basic modicum of welfare for its citizens" and classifies the existing welfare states into three different clusters. Hence, according to Esping-Andersen, welfare states can be divided in:

- Liberal regime, typical of English speaking countries;
- Conservative regime, typical of continental and southern Europe, even if, subsequently, many researchers have argued for the necessity to separate continental and southern European countries in two different clusters.
- Social-democratic regime, typical of the Nordic countries.

Esping-Andersen has formulated such a classification on the basis of the different assumptions underpinning each system. These assumptions are the product of the historical and cultural background of each nation (or group of nations) and influence how entitlements to welfare are distributed, what kind of rights are granted and the objectives which the welfare state aims to achieve. The various regimes also differ depending on the nature and the level of the benefit, the system of

financing and the methods of decision-making, administration, management and supervision (Palier, 2017). Hence, both the value system and the institutional configuration are taken into account in such perspective. In his analysis, Esping-Andersen focuses on the concept of de-commodification of workers, meaning the degree according to which “a person can maintain a livelihood without reliance on the market”. Indeed, he believes that welfare states were precisely born, through various historical processes, to mitigate the process of commodification of workers brought about by the industrial revolution. According to the aforementioned classification, the liberal regime is usually means-tested, meaning that entitlements are granted on the basis of economic resources. For this reason, welfare states beneficiaries are usually stigmatized, appearing lazy and not productive to the non-entitled majority. Moreover, this model is characterized by modest universal transfers and social insurance schemes. In turn, the state supports market mechanisms that may provide welfare (such as private health care) de facto creating a dualism between those who rely on state benefits and those who are able to afford market services (Esping-Andersen, 1990). The conservative or corporatist regime, on the other hand, bases entitlements according to the payment of social contributions, which usually depend on labour force participation. Rights are attached to class and status and aim at the preservation of such disparities. Consequently, also in this regime type there is a problem of duality. In this case, those who belonged to the workforce for long periods and with a certain stability are entitled to benefits, while those who could not find a job or keep it for long enough to reach the required level of social contributions are not. In particular, women, who are often forced to withdraw from labour for long periods due to motherhood and caring within the family, and youngsters, who struggle to get into the job market or are usually precarious, seem to be those excluded. It is also worth noticing that the Church has played an important role in defining this type of regime, recommending the preservation of a traditional family order which led to the creation of a sort of implicit principle of subsidiarity between the state and family, where “the state will only interfere when the family’s capacity to service its members is exhausted” (Esping-Andersen, 1990) and, typically, women would serve as the welfare and support system within the family, providing unpaid care work. Finally, the Social-democratic welfare state aims at granting entitlements on the basis of universality, pursuing the ideal of a high standard of equality guaranteed through the extension of rights to everybody independently from work status or sex. Hence, “all strata are incorporated under one universal insurance system, yet benefits are graduated according to accustomed earnings” (Esping-Andersen, 1990).

Table 1. Characteristics of the three types of social welfare systems

CHARACTERISTICS OF THE THREE TYPES OF SOCIAL WELFARE SYSTEMS

TYPES OF REGIMES			
According to Titmuss According to Esping-Andersen	Industrial-achievement Conservative-corporatist	Residual Liberal	Institutional-redistributive Social-democratic
Geographic situation Historical reference	Continental Bismarck	Anglo-Saxon Beveridge	Scandinavian Beveridge
Aims	Workers' income maintenance	poverty and unemployment alleviation	Equality, an income for all, egalitarian redistribution
Functioning Principle	Contributivity	Selectivity	Universality
Technique	Social insurance	targeting	Redistribution
INSTITUTIONAL VARIABLES			
Eligibility, claiming principle Entitlement based on	Status, work	Need, poverty	Citizenship, residence
Benefit structure	<i>Proportional (contribution related, earnings-related)</i>	Means-tested	Flat-rate
Financing mechanisms	Employment-related contribution	taxation	taxation
Management, control, decision	social partners « par les intéressés »	Central State	State, Local government
CHARACTERISTICS			
Degree of state penetration in social welfare institutions, 'Stateness'	Weak	High	High
Fragmentation of social welfare institutions	High	Weak	Weak
Place and role of the social protection institutions in the mixed economy of welfare	Compensator of first resort	Compensator of last resort	Employer of first resort
Effect on employment	Delay the entry in or favour the exit from the Labour market	Force to go back to the Labour market	Develop public jobs
Social stratification	Pluralist	Dualistic	Unified
Redistribution	Weak	Towards the poorest	Egalitarian
De-commodification score	+ -	- -	++
Defamilialisation record	Weak (with exception like France)	weak	Strongt
Relation between the State and voluntary associations	Neo-corporatist relation with subsidiary state	Pluralism and autonomy	Servicing under the tutelage of the State

Source: Palier (2017).

The typology presented by Esping-Andersen remains one of the most influential, despite several critics received mainly by feminist scholars. The differences between the systems highlighted in such

a typology are rooted in the various historical, social and political background of each country and are today transposed in the problems and challenges that each country is facing and in their way to cope with such issues.

2.3 A Feminist Perspective

It is also important to note that the classification made by Esping-Andersen, has been sharply criticised by feminist scholars. Jane Lewis, in her article 'Gender and the development of welfare regimes' (1992), was the first one to demise Esping-Andersen's classification as obsolete with regards to women. Indeed, when taking into account de-commodification, the focus is centred on the workforce, overlooking the fact that women have notoriously been excluded from a full (if not any) labour market participation, having been forced to focus on unpaid domestic work and caregiving tasks. Hence, by assuming de-commodification of workers as the main objective of a welfare system, the focus is not so much on women, but, rather, on male workers. However, the unpaid work performed by women cannot be ignored since it represents a problem for women themselves, given that unpaid work does not grant access to pensions or other types of contributory benefits. For this reason, Jane Lewis has theorized the existence of a male bread-winner welfare state model, in which there is a traditional division of tasks within the family and society at large, where men are expected to go out to work and provide for economic stability, while women are supposed to stay home and take care of the children and the elderly. Consequently to such a model, based on de-commodification, Jane Lewis has proposed an alternative and more inclusive model, based on the concept of *de-familiarization* meaning, the degree of freedom from the family granted to women by the welfare system. Starting from this assumption and by measuring the degree of de-familiarization allowed to women, Jane Lewis has identified another welfare state classification:

- Strong male bread-winner countries;
- Modified male bread-winner countries;
- Weak male bread-winner countries;

On one hand, strong male bread-winner countries are characterized by a low labour market participation by women and by policies which would discourage the participation of married women in the labour market. However, in a state such as Britain, it is not the rate of participation but the nature of women's participation that shows the presence of a strong male bread-winner model, with women working mainly part-time, with short hours and the grant of few benefits. Furthermore, in these states there is also a little offer of social services such as child care or minimal provisions for maternity leaves. On the other hand, modified male bread-winning countries, like France, are

characterized by a stronger and predominantly full-time women's participation in the labour market. The assumption in these countries is that women will be secondary wage earners but, because of their participation in paid employment, the countries in this cluster usually offer good provisions regarding allowance for childcare and public childcare. Finally, weak male bread-winning countries, like Sweden, are characterized by "the two bread-winner family" in which women's social entitlements are transformed from that of dependent wives to worker. Indeed, since the 1970s women have been treated as workers and have been compensated for their unpaid work. The country has managed to pass from a more conservative view on the role of women to a more progressive one. A series of policies, such as separate taxation and marginal tax rates; increase in number of public day care; parental insurance directed to both women and men with compensation for the loss of market earnings, have rapidly changed the situation. Furthermore, as already mentioned, the criteria of eligibility to entitlements are fundamental to understand how public policies can impact the beneficiaries. In the case of women, it is even more important to understand the conditions that are necessary to be entitled to benefits, since they may encourage or discourage choices concerning labour force participation, fertility and marriage. Sainsbury, in her book 'Gender, Equality and the Welfare State' (1996), believes that entitlements based on universality are the best option, since they include working and non-working women. On the other hand, means-tested entitlements tend to exclude women or create a duality and are thus less effective. According to the author, the book has a theoretical aim, an empirical goal and a normative purpose. "The theoretical aim of the book is to add to the understanding of types of welfare states and to reconceptualise the dimensions of variation used to analyse welfare states by explicitly incorporating gender. [...] The empirical goal is to chart the major welfare state variations and to systematically compare policies and their impact on women and men. The prescriptive objective is to increase our knowledge on how policy mechanisms exclude and incorporate women so that constructive proposals can be made to secure greater equality between women and men" (Sainsbury, 1996). In order to accomplish these tasks, the author takes into account four countries: USA, UK, Netherlands and Sweden, comparing their welfare states from the early 1960s to the early 1980s using the analytical framework proposed by the mainstream research. To this initial comparison, the author adds the feminist perspective through the recast of the feminist critiques to the mainstream model as dimensions of variation. As the author states "the major thesis of the book is that the basis of entitlements constitutes a crucial factor in determining whether social benefits and services allow women's autonomy or reinforce their dependence" (Sainsbury, 1996). The argument of the author is that "entitlements to social benefits based on the criterion of citizenship or residence are of particular importance for women" (Sainsbury, 1996), since they have a strong de-familiarizing potential. By contrast, entitlements based on marital status are detrimental since they

reinforce the breadwinning model. The thesis seems to be confirmed by the findings reached through the comparison between the chosen countries. In particular, through the analysis of the Swedish case it becomes clear that “entitlements based on citizenship or residence are pivotal to the individual model of social policy by eliminating social rights mediated through family relationships. Means tested benefits jeopardize individual entitlement and financial independence by creating disincentives for paid employment. Even more important to women’s entitlements is the social service state. Public services have aided women as consumers, as workers, and as mothers, and public responsibility for child care has facilitated combining employment and motherhood. [...] The coupling of benefits derived from labour market status and care has eroded the distinction between paid and unpaid work in social provision and it may offer the key to ending a gendered differentiation in entitlements where women receive benefits solely as caregivers and men solely as earners” (Sainsbury, 1996). In addition, when taking into account the policies to be implemented in order to bridge the inequality between women and men, the author highlights the ineffectiveness of gender neutral reforms (the reformulation of laws in gender neutral terms) and the insufficiency of gender reconstruction policies (policies that aim at changing the division of labour between women and men). Instead, as supported by the empirical findings, individualization policies (which make the individual, independently on the sex, the unit of entitlements and obligations) have been more successful in equalizing access to social benefits. Furthermore, the empirical findings presented in the book significantly challenge the typology formulated by Esping-Andersen. For instance, a country such as Netherlands, which Esping-Andersen had identified as “a leader in terms of social rights in the early 1980s by virtue of its superior performance on de-commodification” (Sainsbury, 1996), can be considered as such only if the situation of men and households is taken into consideration. In fact, if in that same period the focus is shifted on women, the Netherlands ranks quite low in granting social rights, considering them mainly as caregivers. Only later the country introduced reforms and policies to individualize social benefits.

2.4 Family Policies

After having taken a brief picture of the main existing literature on the welfare state in general, in the next section of the chapter, I am going to focus only on family policies and their impact on fertility. After briefly presenting the challenges and the difficulties that social scientists have to face when researching the effects of family policies, I am going to present in detail the various types of studies and the main pieces of research with their findings.

2.5 The Challenges

It is important to highlight how difficult it can be to actually measure the impact of family policy on fertility. Indeed, there are many obstacles. Firstly, it should be considered that there is no unique definition of family policy. Hence, the range of policies that may have an impact on fertility is extremely broad. In addition, because of data limitations (namely, the lack of reliable data), researchers are forced to privilege some policies while neglecting some others, even if equally important. Furthermore, another problem is represented by the fact that all those studies that take into account global measurements of family policies, overlook individual and case-specific variations in eligibility and benefits entitlements. This is detrimental to the research because individual stories are necessary in order to have a more complete picture (Hoem, 2008). In general, also the choice of the total fertility rate (TFR) as a temporal measure of the fertility level, can be problematic but, nonetheless, it is used widely by researchers as a custom. Another challenge when researching the effect of family policies on fertility, is whether to choose cohort data or period data. The main difference between the two is that, while period data reflect short term changes produced by policies, cohort data reflect long-term developments. Furthermore, since policies do not operate in the void, the analysis is complicated by the interaction of concomitant variations (such as policies, wages, female participation in the labor force, etc.) and side factors (such as tax and benefit system, educational opportunities for women and men, etc.), whose influence is difficult to assess. Moreover, the possibility of a non-linear effect of policies on fertility should also be taken into account. Indeed, fertility could be influenced by a ‘threshold effect’ meaning that, in order to actually affect fertility behavior, benefits may have to reach a certain minimum level (Gauthier, 2007). It should also be noted how challenging it can be to actually assess the impact of a certain policy, given that not only it is very rare to have abrupt policy changes but, even if a policy change was introduced, its effect would be visible in the long-run (D’Addio and d’Ercole, 2005). The endogeneity of some explanatory variables represents another challenge for researchers. Indeed, generally speaking, the presupposition has to be that not only public policies can influence behavior, but also behavior can have an influence over public policies (Hoem, 2008). For instance, “[...] the choices of both working and of having children are jointly determined at the individual's level, since women’s childbearing decisions will affect their decision regarding labour supply, and *vice versa*. Endogeneity may also be an issue when estimating the impact of transfers to families on birth rates, since other countries' characteristics not included in the model may be correlated with both fertility rates and family transfers' expenditures” (D’Addio and d’Ercole, 2005). Finally, the lack of counterfactuals represents another important issue. Without them, “it would be impossible to know what would have happened if a policy had not been implemented, or if it had been formulated in a different manner” (Hoem, 2008). Despite this fact,

there can occur opportunities for comparison and natural experiments. According to Hoem (2008), “natural experiments do occur when, for example, neighboring populations are subject to closely similar economic trends but have different public policies”. In addition, “a further opportunity for comparison can be found in a before-and-after analysis when a major reform is introduced in a country [...]. There may also be unexpected side effects of reforms made with quite different intentions” (Hoem, 2008).

2.6 A Review of Family Policy Literature

As reported by Gauthier (2007), it is possible to divide the research produced on the impact of family policy on fertility into the following different streams:

1. Studies focusing on empirical evidence based on public opinion data and descriptive statistical analysis;
2. Studies focusing on the relationship between fertility and public policy through countries' historical trends;
3. Studies focusing on bivariate cross-sectional analysis;
4. Studies based on multivariate statistical analyses through the use of either micro-level or macro-level data.

The author believes that the first three types of studies are not very reliable because they are descriptive and due to “lack of statistical controls for other determinants of fertility” (Gauthier, 2007). In turn, the last type of studies, based on multivariate statistical analyses, allows “better isolating the impact of policies on fertility from other possible determinants” (Gauthier, 2007). The first stream of literature has taken into account empirical evidence connecting policy and fertility through the use of public opinion data and descriptive statistical analysis. “While these studies are based on relatively simple methodologies (not controlling for other possible determinants of fertility), they continue to be widely cited in the literature as evidence of the positive impact of policies on fertility” (Gauthier, 2007). Many of these studies have taken as their starting point the discrepancy between the ideal and the actual number of children and they used it as a proof of the failure of public policy in removing the obstacles to the realization of one's ideal family (Chesnais, 1996). Even the European Commission in 1990 has identified the gap between the ideal number of children and the real children as the “window of opportunities of policies” (Gauthier, 2007). However, the use of data on the ideal number of children to capture the impact of policies presents some problems. Firstly, “data on the ideal or expected number of children tend to be highly volatile” (Gauthier, 2007). Furthermore, it should be considered that when asked about their ideal number of children, people tend to respond

according to social norms and expectations rather than to express their own true opinion (Livi Bacci 2001). “In particular, responses to questions about the ideal number of children tend to cluster around the two-child norm, and very few people tend to report having zero or one child as the ideal” (Gauthier, 2007). However, it is also worth noticing that recent studies have reported a decline in ideal family size below the two-child norm. This would suggest that the “window of opportunity of policy” may be actually decreasing. In addition, some researchers have focused on what public opinion perceives to be the reason for not making the desired number of children. This approach implies that if some policies are considered to be the cause of low fertility, then modifying and improving them will guarantee an increase in fertility. However, there is no evidence that it would be the case (Gauthier, 2007). Subsequently, studies based on time-series analyses have tried to assess the impact of public policy on fertility through the study of countries’ historical trends. For example, as reported by Gauthier (2007), some have argued that France’s high fertility rates with respect to other Western European countries, were a product of long-term high level of support for families. As a prove of the validity of their approach, some other researchers have taken the case of Germany, making a comparison between family policies and fertility rates of Western and Eastern Germany. Indeed, while until 1976 the fertility rates of the two countries were quite the same, in 1977, after the introduction in Eastern Germany of a new family policy package, which included extended maternity leave and paid childcare leave, the country’s fertility rates started to increase (Gauthier, 2007). However, there are also some powerful counterexamples that prove this method of analysis not to be completely reliable. For instance, Gauthier (2007) points out how fertility in Britain has been very close to that of France in recent decades, despite the countries’ striking different approach in family support and welfare entitlements. “Similarly, while the province of Quebec in Canada provides a much more supportive family policy than the other provinces, its fertility has remained either at a level that is lower or equal to that of the rest of Canada since the mid-1960s—and this despite the adoption of a series of pronatalist measures from the late 1980s including a generous baby bonus for the second and third child” (Gauthier, 2007). The fallacy of these kind of studies seems to be the lack of consideration for other determinants of fertility with the consequence of not grasping the real impact of policies (Gauthier, 2007). Thirdly, some studies have tried to assess the impact of policies on fertility on the basis of bivariate cross-sectional studies, since the different policies at work in different countries prove to be a natural experiment to see which policy works better and why. These studies have shown mixed results, with a positive correlation between some policies and fertility. Some researchers have shown the presence of a strong bivariate correlation between a policy package, which included fiscal measures such as a child related tax benefits and cash allowances, and the TFR for the year 2000. While such a positive correlation was valid for a poor family and the total period

fertility rate, it lacked any statistical significance for a large family and the total period fertility rate. Moreover, Castle (2003) has proven, through a series of bivariate correlation analyses between different policy indicators and fertility for twenty OECD countries, that while cash benefits do not have a statistically relevant impact on fertility, work and family reconciliation policies do (Gauthier, 2007). In addition, the bivariate correlation between female labor force and fertility has served as a proof for the positive impact of policies, especially the work and family reconciliation ones, on fertility. As already mentioned in the previous chapter, while this correlation was initially negative in the 1970s, it became positive during the 1990s, so that now those countries that have a higher women's labor force participation rate have also a higher fertility rate. This positive correlation between female employment and fertility seems paradoxical with respect to the economic model of fertility, which posits that "when women are active in the labor market, they face a higher opportunity cost of children and should consequently have a lower fertility—unless of course their opportunity cost is reduced by specific policies" (Gauthier, 2007). It is precisely because of this apparent paradox that many researchers have explained how policies can "ease the incompatibility between work and family responsibilities and can indirectly affect fertility" (Gauthier, 2007). But some researchers have refused such a conclusion. For example, Kogel (2004) denied the reversal of sign of the correlation in the first place and, on the basis of econometrics evidence, he proved that the negative relationship between fertility and women's labor force participation was still valid. The apparent reversal in sign was instead explained by "the combination of country effects and country-heterogeneity in the magnitude of the negative time-series association" (Kogel, 2004). And, despite a weakening of the time-series association between fertility and female labor force participation in some countries after 1985, he concluded that "changes in public policies or labor market developments cannot have caused that a rising female labor force participation increases the total fertility rate within countries over time" (Kogel, 2004).

Finally, regarding the studies based on multivariate analysis, they can be divided in two sets:

1. Studies based on macro-level data, which "exploit cross nation or historical variations in family policies in order to assess their impact on fertility" (Gauthier, 2007).
2. Studies based on micro-level data, which are based on individual level data.

Studies based on macro-level data typically use a global measure of fertility, such as the total period fertility rate (TFR), as the dependent variable and specific policy indicators as independent variables. Both studies based on a cross-national design and on a single-country design have concluded that there is a positive impact of policies on fertility (Gauthier, 2007). It should also be considered that studies using macro-level data have tried to investigate the time-reach of policies namely, whether

policies affect fertility only temporarily or also in the long-run. Studies focusing on such aspect, through the use of age- and parity- specific fertility rates, have concluded that the main impact of policies on fertility is the so-called “tempo effect”. Policies are most powerful in affecting the timing of births rather than the total number of children and this would, in turn, affect period fertility. According to Lutz and Skirbekk (2005), such a tempo effect of policies should not be neglected. Indeed, they argue that policies that may increase the period fertility rate may also eventually have an indirect effect on cohort fertility. Also, research based on micro-level data has concluded that the aforementioned policies have a positive effect on fertility, even though with a complex variety of results. Since multivariate analysis studies are considered to be the most reliable studies on the correlation between policies and fertility, I am now going to describe the findings from this category of studies regarding the effects of the main family policies on fertility.

2.7 The impact of family cash benefits on fertility

Regarding family cash benefits, the majority of the studies based on macro-level data have proved that child allowances and tax credit for dependent children have a positive impact on fertility so that, the higher the benefits, the higher the fertility. According to D’Addio and d’Ercole (2005), higher transfers to families that reduce the costs for children also raise fertility rates. Moreover, Luci and Thévenon (2012), have found that also “the amount of cash benefits granted in the period after the year of childbirth has a large positive impact on TFR”. According to their study, these cash benefits have a positive impact on both the timing of births and the quantity of children achieved. However, their conclusions are not shared by Kalwij (2010), who has shown how “an increase in child subsidy through a family allowance has no significant impact on the timing of births or on completed fertility”. According to Kalwij (2010), the ineffectiveness of child subsidies can be explained by the fact that such subsidies only target the direct costs of childbearing, forgoing the opportunity costs, which have actually become the most important costs taken into account by parents-to-be (especially by mothers). For those studies which have posited a positive correlation between cash benefits and fertility, they all share the finding that their impact tends to be small. Indeed, it has been estimated that the real impact of cash benefits equals 0.2 children per woman (Sleebos, 2003). Furthermore, researchers have computed that “a 25% increase in family allowance would increase fertility rate by about 0.6% in the short-run, and by about 0.4% in the long-run – that is an increase of the total fertility rate of 0.07%” (Sleebos, 2003). Because of its high cost and such a small impact over general fertility, this policy is often seen as ineffective or non-feasible. However, MacDonald point out that “for most very-low-fertility countries, even an increase of 0.4% in the total fertility rate would raise TFR above 1.5”. Hence, it would seem that to make a difference small impacts are required. Indeed, focusing

over the period 1980-2003, Kalwij (2010) found out that to the large changes in expenditure on family policy in western Europe corresponded a considerable fertility response. As shown, “table 8 provides insights into this using a Monte Carlo simulation and thereby keeping all other factors affecting fertility constant. [...] Over this period, on average, expenditure on child allowances per child increased by 26%, expenditure on maternity- and parental- leave benefits per infant for employed women increased by 76%, and expenditure on childcare subsidy per young child for employed women increased by 158%. [...] Table 8 shows that the increased family policy expenditure in western Europe during 1980–2003 had significant effects on the timing of maternity and completed fertility. Childlessness at age 36–40 declined by about 19%, and completed fertility increased by about 8.3%” (Kalwij, 2010).

Table 2. Simulated Effects on Life Cycle Fertility of Observed Changes in Family Policy Program Expenditure, 1980-2003

Age Group	Baseline Prediction	Difference From Baseline	
		Estimate	z Value
Probability of Having Children			
16–20	0.019	0.002	1.810
21–25	0.162	0.017	1.910
26–30	0.489	0.034	2.020
31–35	0.791	0.030	2.060
36–40	0.883	0.022	1.990
Average Number of Children, Conditional on Having Children			
16–20	1.037	0.006	1.570
21–25	1.164	0.027	2.400
26–30	1.379	0.059	2.690
31–35	1.721	0.092	2.850
36–40	1.944	0.109	2.860
Average Number of Children			
16–20	0.020	0.002	1.890
21–25	0.189	0.025	2.140
26–30	0.675	0.078	2.430
31–35	1.363	0.127	2.830
36–40	1.718	0.143	2.990

Source: Kalwij (2010).

Finally, concerning the impact of tax exemptions for dependent children, the existing studies are contradictory. According to some, tax policies have a strong positive effect on fertility, especially in the lower-income households, while others note only a weak positive impact (Sleebos, 2003).

2.8 The impact of work-related policies on fertility

Also in the case of studies focused on work-related policies, such as parental leave or childcare services, the results are mixed. Some studies have found that work-related benefits have a small positive impact on fertility while some others have found no evidence of any impact. A possible explanation for such a diversity of results is “the concomitant increase in female labor force participation and childcare supply (in some countries), the heterogeneity of parents in terms of childcare needs, the structure of the childcare system in terms of opening hours, and the relationship between the public daycare system and other social and welfare state institutions” (Gauthier, 2007). In particular, the difficulty in assessing the impact of parental leave on fertility is explicable by the fact that on one side this policy supports “household income and labor market participation around the time of childbirth, which has a positive effect on fertility. However, as entitlements are often conditional to employment, they encourage men and women to postpone childbirth (which has a negative effect on overall fertility) until they have established themselves in the labor market” (Luci and Thévenon, 2012). Luci and Thévenon (2012) find that paid leave duration has a positive impact on fertility only when controlling for female employment and female working hours. On the contrary, D’Addio and d’Ercole (2005) have found a negative impact of such a variable on fertility, even though it should be considered that, in their study, they were not controlling for the development of childcare services for children under three and paid leave tends to be longer in those countries in which there is not an adequate provision of childcare services. Hence, “it is very likely that the identified negative impact of leave duration captures partially the impact of a shortage of childcare services for very young children” (Luci and Thévenon, 2012). Moreover, D’Addio and d’Ercole (2005) have also found that the higher the wage replaced during maternity leave, the higher fertility rates. This finding seems to be confirmed also by Luci and Thévenon, (2012) and it highlights the importance of looking at the combination of the duration and generosity of child-related leave. Furthermore, Castles (2003), as well as D’Addio and d’Ercole (2005), shows that there is a positive correlation between the percentages of employees working part-time and total fertility rate across OECD countries. Castles also found a strong positive relation between the presence of a well-organized childcare service, especially for children under three, and fertility rates, while, at the same time, it has been found that limited availability of childcare services influence negatively fertility rates and timing of childbearing too (Sleebos, 2003). Such a finding was confirmed also by Luci and Thévenon (2012), who found a

strong positive effect of childcare provisions on fertility. Furthermore, in their research it is also shown how female employment is positively correlated with fertility, hence, echoing Kalwij (2010) and his stress on opportunity costs (rather than direct costs) in childbearing decision-making, “the finding of a negative impact of female working hours on fertility suggests that possibilities to combine work and family life play an important role in women’s decision to have children once they are actively participating in the labor market. Moreover, when combining family policies with female employment and women’s working hours, we find that all policy instruments (paid leave, childcare services and financial transfers) have a cumulative positive influence on fertility, suggesting that a continuum of support, especially for working parents, during early childhood is likely to facilitate parents’ choice to have children. Nordic European countries and France are examples of this mix. Policy levers do not have similar weight, however. We find that in-cash and in-kind benefits covering the first year after childbirth have a larger potential influence on fertility than leave entitlements and benefits for childbirth” (Luci and Thévenon, 2012). Kalwij (2010) also reached the same conclusion, focusing on the reduction of opportunity costs of childbearing, his study showed that “a 10% increase in maternity- and parental-leave benefits results in about a 3.2% reduction in childlessness at ages 36–40 but has no significant effect on completed fertility. Conversely, a 10% increase in childcare subsidies has no significant effect on the proportion of women who have children but results in about a 0.4% increase in completed fertility “. Finally, D’Addio and d’Ercole (2005) have showed that the total fertility rate is higher in those OECD countries where the direct costs of having a child are lower, the length of parental leave is higher and childcare enrolments are higher. Other variables, such as female employment rate, opportunity costs of children and cultural norms regarding family and gender norms, appear to have a positive effect on fertility, but they are not statistically relevant. And, as a result of the aforementioned limitations to research, the same authors interpret their results with caution. However, some of the findings produced by D’Addio and d’Ercole correspond to results achieved in previous research. Indeed, “a higher unemployment rate, by increasing income uncertainty, lowers fertility rates. This result is consistent with finding from other studies (e.g. Gauthier and Hatzius, 1997; Adsera, 2004; Kravdal, 2002) suggesting that unemployment is an important concern for those women who decide to have a child” (D’Addio and d’Ercole, 2005). Table 3 represents a sum-up the findings of some of the main studies on the impact and effects of family policy on fertility.

Table 3. Comparison of results of cross-national studies

Explained variable	Gauthier and Hatzius (1997)	Adsera (2004)	D'addio and Mira d'Ercole (2005)	Hilgenann and Butts (2009)	Kalwij, 2010	Present study
Country and period – methodology	or 3 and more children separately)	Total fertility rates	Total fertility rates	Achieved fertility at age 18-45	Timing of birth family size	Total fertility rates
	22 OECD countries 1970-1990 - Panel data methods	28 OECD countries 1960-1997 - Panel data methods	16 OECD countries 1980-1999 - Panel data methods	20 OECD countries, 1995-2000 waves of European or World Value Surveys – cross-sectional multilevel approach	16 European countries - Event history analysis Information on individual fertility history from the European Social Survey 2004	OECD countries 1982-2007 – Panel data methods
Childcare provisions	<i>Enrolment rates</i>			Positive	Not included	Positive
	<i>Spending per child</i>	-	-	-	No effect Positive	Positive
Leave entitlements	<i>Spending per child (all leave included)</i>	-	-	-	No significant effect Positive	Positive
	<i>Payment rate of maternity leave</i>	-	Positive	Not significant	-	-
Financial transfer	<i>Duration</i>	Positive	Negative	Negative	Not included	Positive
		Positive	Positive	-	No effect No effect	Positive

Source: Luci and Thévenon (2012).

2.9 Conclusion

Despite all the difficulties and challenges met in the various research processes and the mix of results and findings very often presented by researchers, the evidence produced by the majority of the studies undertaken until now on the impact of public policy on fertility shows that the creation of a comprehensive family policy package may help increasing fertility rates of couples. Most importantly, policies that aim at the reduction of the opportunity cost of childbearing through the provision of childcare services are going to be extremely efficient, increasing fertility in quantity and also anticipating childbearing. Subsequently, the reduction of direct costs through financial benefits and child allowances is also going to be beneficial. And, even if the effects of such policies are going to be rather small, considering that their aim is not to recreate a baby boom, they are still going to represent a significant difference. To conclude this chapter, it is worth highlighting how the understanding of the problem of low fertility and the search for its possible solutions are possible only thanks to the inclusion of women in the discussion regarding welfare state and public policies. Indeed, the reduction of opportunity costs and the need for policies to reconcile work and family apply especially to women and to their condition.

WELFARE POLICIES AND THEIR IMPACT ON FERTILITY: A COMPARATIVE ANALYSIS

3.1 Introduction

In this chapter I am going to analyse the fertility trends and the most salient family policies in Sweden, Italy and France. In the first paragraph, I am going to describe the fertility fluctuations in Sweden and the policies implemented to cope with the phenomenon, focusing on the leave schemes and childcare provisions. I am going to show how the policies that were originally set up in order to achieve gender equality, have revealed instrumental in achieving a high fertility. In the second paragraph, I am going to show the Italian situation and stress the importance given to the family by the Italian Welfare State. Hence, rephrasing the words of previous researchers, I am going to talk about ‘familialism’ to refer to the Italian case and examine its consequences on fertility and women’s conditions in general. Finally, in the last paragraph, I will examine the case of France, a country that can be considered to stand between Sweden and Italy policy-wise, since its public policy is divided between familialism on one side and the willingness to include women in the workforce granting them a higher degree of equality, on the other. Such a dualism will be visible in the wide array of policies that the French state has implemented.

3.2 Sweden

3.2.1 Fertility Trends

Ever since World War Two, fertility in Sweden has, on average, maintained quite high levels. Fertility was particularly high during the 1960s, reaching a TFR of 2.47 in 1964. After a slight decrease during the 1970s, fertility rose steadily during the 1980s, to reach its peak in 1990, when a TFR of 2.14 was registered. Subsequently, during the 1990s, fertility started a sharp decrease, plummeting to a TFR of 1.50 in 1999. Its recovery only started in 2002, when the TFR rose to 1.65, and continued throughout the entire first decade of the twenty-first century. In 2015, total fertility rate was equal to 1.88 children per woman. Because of this ups-and-downs, fertility in Sweden is considered to follow a ‘roller-coaster’ trend (Neyer and Andersson, 2008), differing in this aspect from all other Nordic countries. Nonetheless, it is important to note that, despite such a specific trend, on average fertility in Sweden does not differ from that of the other Nordic countries (Neyer and Andersson, 2008).

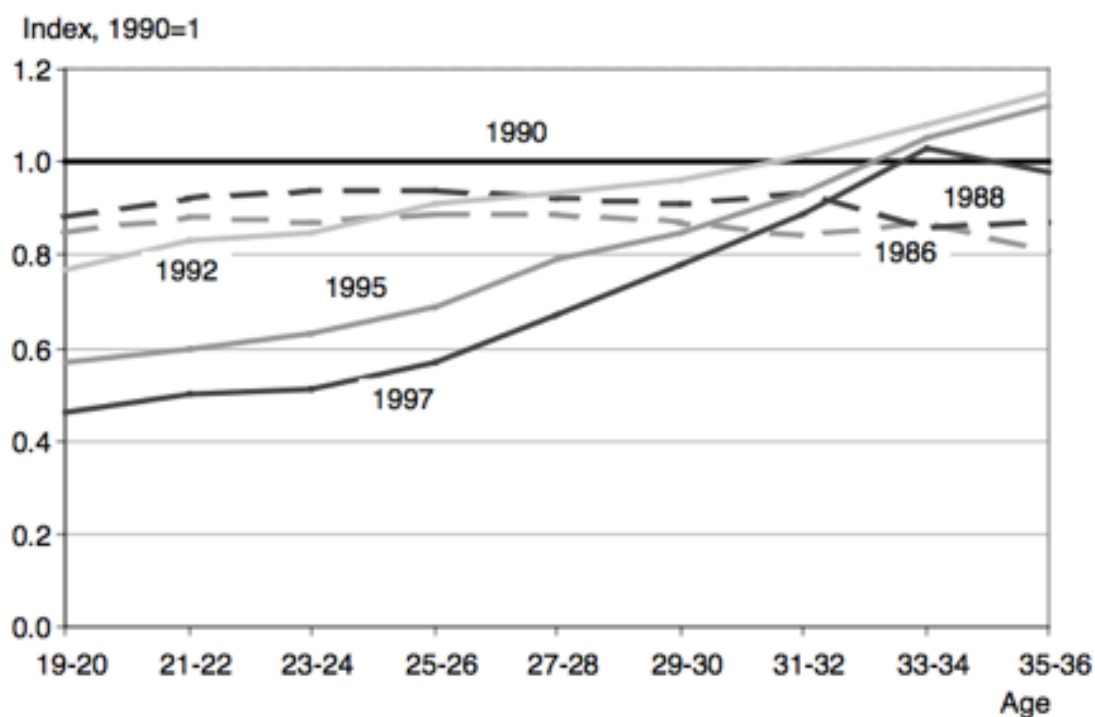
However, according to some researchers, such an aggregate measure of fertility is not sufficient to portray an accurate picture of fertility in Sweden. Indeed, individual-level data and cohort data is supposed to be more representative of the country's fertility history than the aggregate TFR (Neyer and Andersson, 2008). Cohort analysis has been undertaken by Björklund (2006), who showed that, while women born until 1965 had reached, in 2003, a fertility level of 1.87, women born after 1965 should have spaced their children extremely close in order to reach the same fertility level of their preceding cohort. The lower fertility level for women born after 1965 was actually due to postponement of childbearing, especially for women under thirty. As reported by Hoem (2000), "the first-birth rates of women under 25 have actually been cut in half between 1990 and 1997". "Among women born at the beginning of the 1950s, about 40 percent were childless at the end of the year in which they turned 25. This fraction increased successively and reached 60 percent among women born only ten years later. The fertility increase during the late 1980s cause a break in the postponement of motherhood which produced a plateau in the percent childless at all ages, followed by a new rise in childlessness as fertility dropped in the 1990s. At the end of 1997, over 70 percent of women were childless at age 25. The differences between one cohort and the next in the percent that are childless decrease as we proceed to higher ages. This means that so far, the delay in childbearing has not caused an increase in permanent childlessness. Swedish women have compensated for their low first-birth rates at younger ages by getting more first births at higher ages" (Hoem, 2000).

3.2.2 The Structure and Impact of Family Policies

When analysing family policies in Sweden, it should be considered that such policies were conceived not to increase natality but, rather, to reach gender equality through a complete integration of women in the labour market (Duvander and Andersson, 2006). It is precisely for this reason that the majority of the entitlements and benefits in Sweden are related to earnings and that, in recent decades, the phenomenon of postponement of childbearing has grown in intensity. Indeed, women in Sweden are incentivized by the policy structure itself to first complete their education, get a full-time job and ensure a permanent position (so to be able to return to it after parental leave) and, only then, to have children (Björklund, 2006). Moreover, Hoem (2000) has shown that "it seems that women with a regular job have much higher first-birth rates than those who do not, but that otherwise the amount of the earned income is unimportant". Hoem (2000) also reports that: "the increases in first-birth rates essentially went in lockstep between 1986 and 1990 [...] over this period the rates increased by almost fifteen per cent at all ages. After 1990, the changes have been very different at different ages. Fertility

has decreased successively for the youngest of the childless women, and was only about half in 1997 of what it was in 1990. As we move up through ages above 25, the decrease is progressively smaller, and at ages between 33 and 36 there mostly has been an increase instead. The fertility decrease among childless women after 1990 has been concentrated to the younger age groups”.

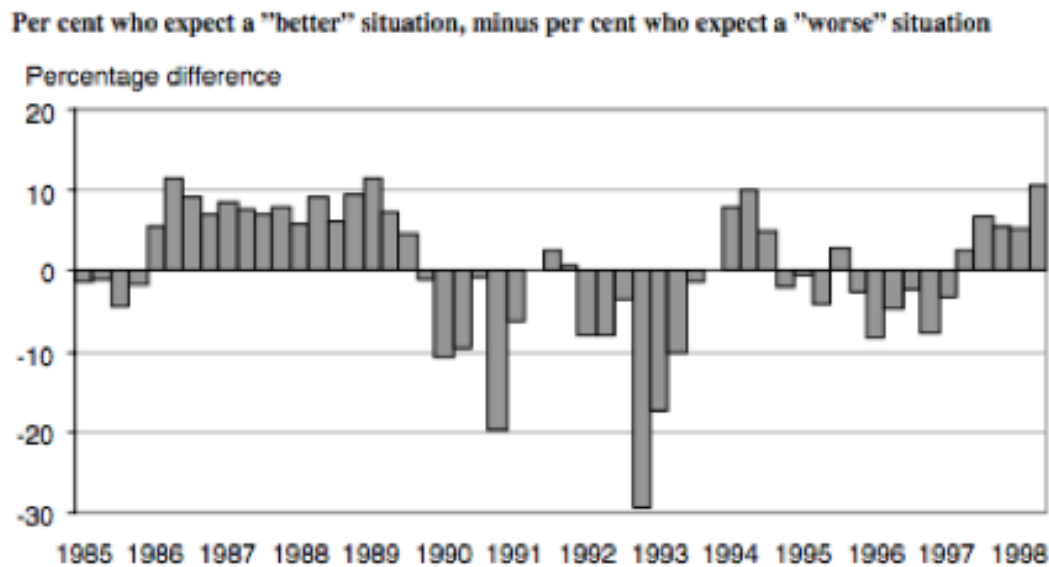
Figure 12. First Births, 1986-1997, relative to 1990, for selected ages



Source:., Hoem (2000)

This last aspect reflects the higher unemployment level registered in the 1990s, following a period of economic downturn in Sweden. In this very same period, welfare programs were cut, people's expectations in Sweden became more pessimistic and overall natality dropped.

Figure 13. Expectations about their own household's economic prospects over the next twelve months



Source: *Hoem (2000)*

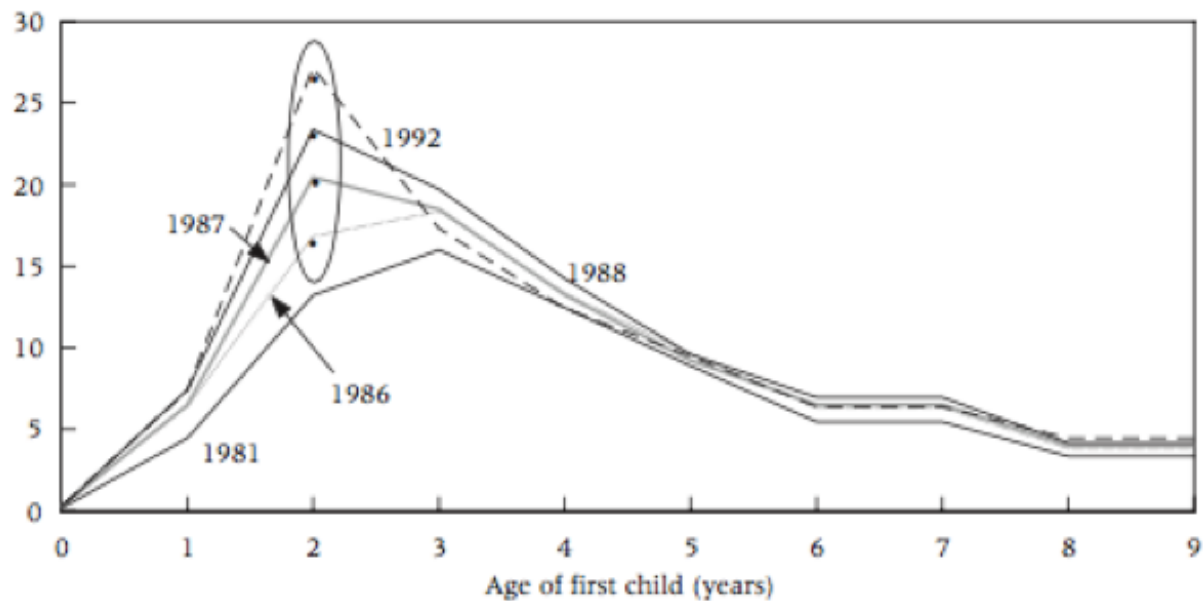
3.2.3 Parental Leave

Sweden was the first European country to introduce a parental leave in 1974. Before the introduction of the parental leave, ever since the 1950s, a paid maternity leave scheme was in place and it offered pay for three months at a flat rate compensating for about 60% of foregone earnings (Björklund, 2006). Moreover, during the 1960s, Swedish women had access to 6 months of unpaid leave after giving birth. In 1974, the parental leave scheme was introduced allowing both mothers and fathers to take a paid leave from work. Initially the compensation benefits were 90% of foregone earnings, with eligibility based on “earnings in the 240 days prior to giving birth” (Björklund, 2006). Those who did not fit the criteria of eligibility received a lower flat rate benefit. The benefits received were paid through public contributions and, thus, did not fall on the employers (Duvander and Andersson, 2006). Moreover, benefits were taxed and counted as an income source that granted future pension rights. All parents permanently residing in Sweden were entitled to parental leave, which could “be used in various ways: full-time, half-time, quarter-time by either of the parents until the child turn eight” (Duvander and Andersson, 2006). In the subsequent years, there were a series of extensions of the benefit period: “in 1975 the period was 7 months; in 1978, 8 months plus 1 month at a low flat rate; in 1980, 9 months plus 3 months at a low flat rate; and in 1989, 12 months with a 90% replacement rate plus three additional months at a low flat rate” (Björklund, 2006). Moreover, during the 1980s, in order to increase the number of father who would take the leave, the ‘daddy days’ were

introduced. These ten days were for an exclusive use of the father and they were prolonged to a month in 1995, when it was made compulsory for the mother and the father to use at least one month each out of the total parental leave amount. In 2002, a second month reserved for each parent was introduced and the leave was prolonged for 16 months. In 1995, 1996 and 1997, the income replacement level was reduced to 75% because of the economic downturn that Sweden was experiencing. In 1998 was, however, raised again to 80%. Despite all the attempts at increasing the percentage of fathers using the parental leave, their proportion is still lower with respect to women, who use the majority of the leave scheme. According to Duvander and Andersson (2006), “economic characteristics are important determinants of Swedish fathers’ use of parental leave. Both mother’s and father’s earnings have a positive impact on father’s uptake; father’s earnings have the strongest impact. However, father’s uptake does not seem to increase with earnings above the ceiling of the income replacement, which could be interpreted as sensitivity to the cost of parental leave. Furthermore, fathers with more education, employed in the public sector, and with partners with more education take more leave than other fathers”. However, increasing father’s leave uptake may have important consequences over fertility, as it has been proved that there is a positive relation between the number of fathers who take the parental leave and the level of fertility. Duvander and Andersson (2006), have showed that “couples where the father takes parental leave have considerably higher second-birth intensities than couples where the father takes no leave at all, and second-birth risks increase with an increasing level of paternal parental leave use. However, for the small category of one-child couples where the father took very extensive leave, there is reduced second-birth intensity”. Hence, paternal leave is positively correlated to continued childbearing except for those cases in which the leave is very long. This negative correlation may be explained by some other factors, such as a permanent drop-out of the father from the labor market. When it come to the impact of mother’s uptake of parental leave on fertility, Duvander and Andersson (2006) found that “the relationship between mother’s parental leave use and second births is also not so strongly affected by the controls for couple income and educational characteristics. Second-birth risks are highest for the most common categories of couples where the woman has received between one and three quarters of her earnings from the parental leave system. Very low and very high levels of maternal uptake of leave are related to a reduced risk of second birth. [...] The extreme users, be they men or women, have the lowest risks of having a second child”. Also in this case, the negative relation may be linked to mothers not returning to the labor market after childbearing. Moreover, they have observed that “couples where the father took a relatively large amount of parental leave had the highest third-birth fertility. Such couples have about 10% higher third-birth fertility than other couples. However, in this case the relationship is strongly affected by the control for parents’ educational characteristics and

couple income. [...] With the control for educational characteristics, the positive effect of paternal leave use on third-birth risks vanishes. The control for couple income has the opposite effect, and when both types of socio-economic variables are included in the model, we find a weak but still clearly positive impact of father's uptake of parental leave [...]. For third births, the impact of the mother's use of parental leave is quite the opposite of what we found for second births" (Duvander and Andersson, 2006). Regarding the problem of postponement of first births, the solution undertaken in order to soften its consequences, was that to incentivize a closer spacing of second births through a 'speed-premium', introduced for the first time in 1980. Indeed, since in Sweden the level of the leave benefits is earing-related, a period of no-work or part-time work subsequent to the birth of a child would penalize mothers. The 'speed premium' though allows women who had a second child within 30 months from the first, to get the same benefits level that she had working full time before the occurrence of any birth. This measure is considered to be a 'critical juncture' since it changed "childbearing behavior among women of all educational levels" (Neyer and Andersson, 2008) prompting a closer spacing of first and second births. Moreover, the closer spacing was not temporary, but it continued even during the 1990s economic downturn. Indeed, "ever since 1986 Swedish mother have had their children at a faster tempo than before the policy intervention of that year" (Neyer and Andersson, 2008).

Figure 14. Second-birth risks by duration since first birth: Swedish-born mothers in Sweden with one child, 1981, 1986, and 1992 standardized for age of mother (per cent)



SOURCE: Andersson, Hoem, and Duvander (2006).

In addition to parental leave, in 1974 was also introduced the pay for temporary care of sick children. At first this leave amounted to 10 days per year for the 90% of foregone earnings. However, “in 1980 the number of days was increased to 60 a year, and in 1989–1990, this was further increased to 90 a year. This benefit arguably helps alleviate the stress associated with having young children and a job in the labor market. For example, parents need not use their vacation days to take care of sick children. Neither do they need to pay for expensive care for a sick child” (Björklund, 2006). Finally, another important measure related to working hours was taken in 1979, when the Parliament decided to grant working parents the right to cut their working hours from full time to 75%, in order for them to take part-time leaves until the child turns eight (Björklund, 2006).

3.2.4 *Childcare Provision*

The Swedish childcare system has always been considered a virtuous example because of its availability, quality and price. Indeed, these three factors have proved to be crucial for the childcare services to positively affect fertility. In Sweden, despite remaining a ‘public responsibility’ and “an important part of the overall welfare system, which is directed towards a dual-breadwinner model, gender equality, and the promotion of same opportunities for children of all social backgrounds” (Andersson et al., 2004), throughout the 1990s, “decision-making power has been increasingly transferred from the state to the municipalities. This has led to a situation where child care, which once operated according to the same rules across the country, can vary substantially across

municipalities” (Andersson et al., 2004). Originally, when instituted in the 1970s, childcare services were centralized and considered to be linked to economic growth since they could allow women to participate into the labor force. “While in 1975 less than 20 percent of children under the age of seven were enrolled in a public day-care institution, this number had increased constantly to almost 75 percent in 1997” (Andersson et al., 2004). While in the 1970s and 1980s, the costs were covered for the major part by the state and the municipalities and only for a small part by parents, after the 1990s economic downturn, public budgets for childcare were cut and the parents’ expenditure increased. Moreover, in that same period the decentralization to municipalities occurred. However, such a decentralization did not have an impact on childbearing meaning that, “despite some regional variation in the quantity, quality, and price of day care, the overall coverage with affordable, high-quality childcare opportunities is apparently at a sufficiently high level to allow parents to make their fertility decisions relatively independently of the specific characteristics of their local area” (Andersson et al., 2004). Moreover, it should be considered that in an efficient system like the Swedish one, any lack in the childcare service provision by any municipality is compensated by the remaining family policies. Moreover, besides care for preschool children, local governments also provide before- and after- school care for children up to ten years old. And, as pointed out by Björklund (2006) “in most local communities, the structure of the fees for before- and after-school care also created a kind of speed premium. In general, families with more than one child in public day care at the same time were offered much lower fees for the second child and for subsequent children”.

3.2.5 Cash benefits

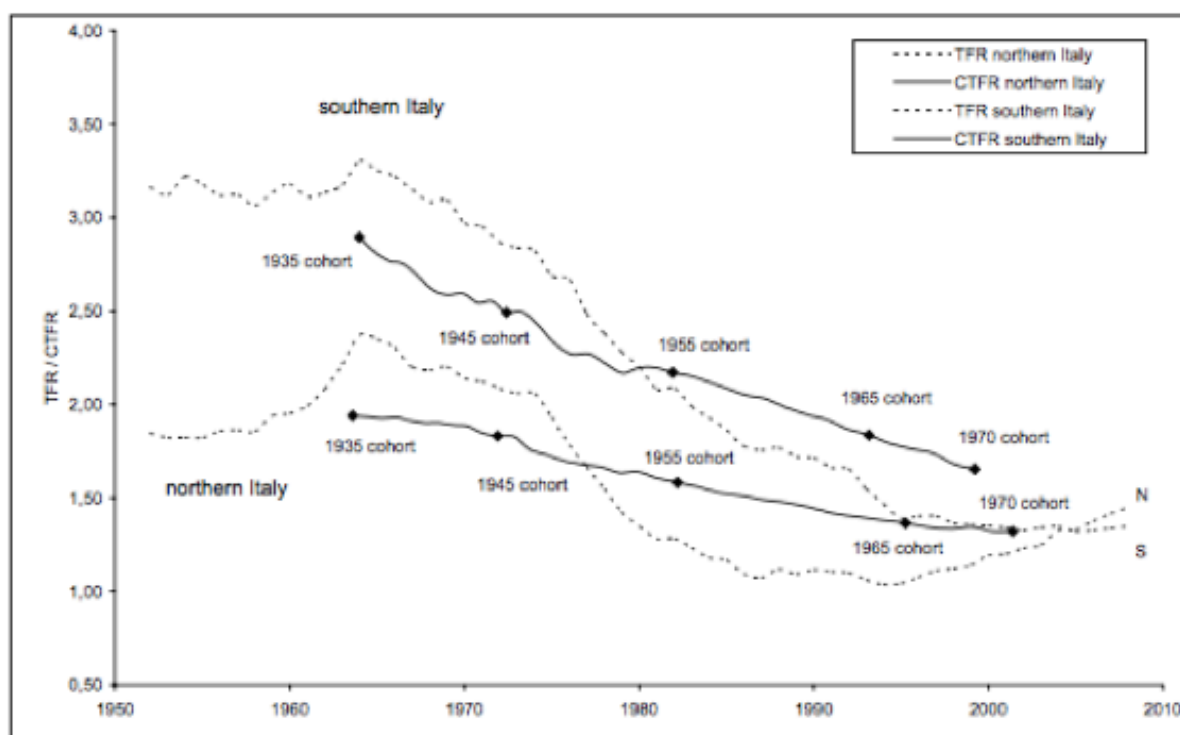
Regarding tax benefits granted to parents, Sweden introduced in 1948 the universal child allowance, which consists in a non-taxable fixed amount per child granted to the mother. This benefit increased over time and also according to the number of births in a family. Indeed, a higher amount is foreseen for third and subsequent children. In addition to such an allowance, families can also become eligible for means-tested housing allowances and social assistance benefits (Björklund 2006). Generally speaking, child allowances in Sweden do not differ much from those in place in other developed countries. However, while they can be helpful in alleviating some direct costs of childbearing, they are not directly linked to the promotion of childbirth. Indeed, “in the Swedish context, childbirth is supported by providing an infrastructure that allows women and men to pursue their individual life goals in terms of family and professional life” (Andersson, 2005).

3.3 Italy

3.3.1 Fertility trends

Unexpectedly, fertility decreased massively in traditional and family-oriented Mediterranean countries such as Italy, which registered a TFR below 1.3, a level considered to be critical, in 1993. Indeed, since Italy has had a fertility level below 1.5 for over 25 years, it is considered to be a country with persistent very low fertility levels. After World War Two, Italy was subject to a baby boom that allowed TFR to peak to a level of 2.7 in 1964. However, ever since the 1970s, the number of children started to decline and the replacement level of 2.1 was no longer reached since 1977. The decline continued steadily plummeting to its lowest point in 1995 with a TFR of 1.18. Subsequently there was a slight increase. In 2000, the average number of children per woman was estimated to be at 1.24. It oscillated around 1.4 for the subsequent years, until 2013 when it went back to a level of 1.3. In 2015, the TFR was 1.37. However, it is important to note that this slight increase in TFR was characterized by distinct regional patterns (Caltabiano et al., 2009). Indeed, while in northern Italy the fertility level has reached the level of the early 1980s, in many southern regions fertility has continued to decline. For instance, “in 2005 TFR in Sardinia was around 1.0” (Caltabiano et al., 2009). However, not only period fertility, but also cohort fertility displays an alarming decline. Moreover, cohort fertility shows that “the postponement of reproductive activity to over thirty, [...], is not compensated by the fertility of cohorts after the thirtieth birthday. The average number of children decreases in all orders [...] and the overall number of offspring, in the space of little more than ten or so generations, falls from 1.9 (born in 1950) to 1.6 (born in 1963)” (Caltabiano et al., 2009). The task for subsequent cohorts to compensate for the current fertility deficit is incredibly difficult given that some studies have shown that younger cohorts, especially coming from the southern regions, have a “permanent fertility deficit” (Caltabiano et al., 2009). Alarming, the low fertility experienced in Italy in the recent decades may have devastating effects over population's structure and society's equilibrium. Indeed, “a TFR of 1.3 implies an average annual reduction rate of 1.5% in a stable population with an average age at childbirth of 30. This scenario means that the birth cohort and the population halve every 45 years” (Caltabiano et al., 2009). Taking into account the speed of this population change it would be extremely difficult for the society to adapt (Caltabiano et al., 2009).

Figure 15. TFR and CTFR (lagged by mean age at childbearing), Northern and Southern Italy



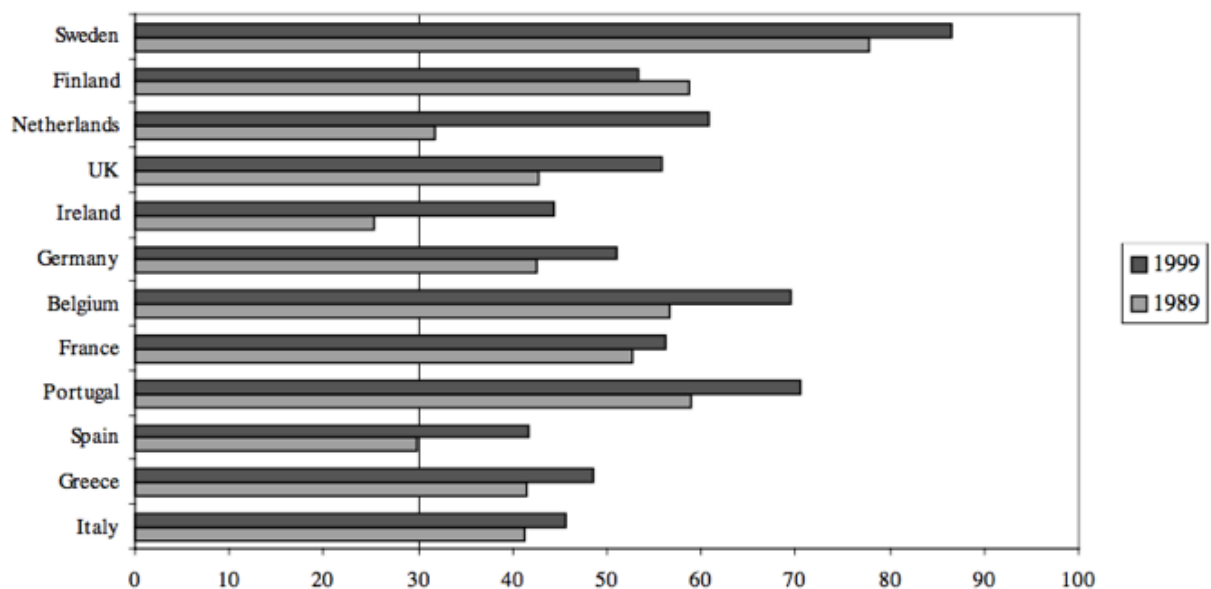
Source: Caltabiano et al., 2009

3.3.2 A 'Sui Generis' Welfare State Model

Italy has been considered for a long time as part of the Corporatist/Conservative Welfare Regime together with other continental European states such as France and Germany. However, many have argued that, especially concerning family policy, Italy should be regarded as belonging to another category, namely that of Southern European States. Indeed, Flaquer (2000), considers Southern welfare states as “a via media with respect to other systems of social protection, as they encompass elements of both Bismarckian and Beveridgian traditions”, as all Southern European countries have social security schemes characterized by high fragmentations, resulting in a blend of ‘occupationalism’ and universalism (Flaquer, 2000). (Fagnani, 2006) Because of this hybrid nature, the Italian Welfare State is characterized by marked dualism. There exists a differentiation between those who have a secure job position, which guarantees protection in the case of unemployment and the access to pensions and other benefits through the payment of contributions, and those who struggle to get into the work force in the first place. Alarming, such a

division between insiders and outsiders corresponds to a gender and generational division as well. Indeed, women and youngsters have difficulties in entering and/or remaining in the labour market for long enough to reach the required minimum level of contributions. Consequently, it seems that the Italian welfare state “contributes to the upholding of the patriarchal features of Mediterranean welfare systems” (Flaquer, 2000). The difficulties that women face in getting and maintaining a job, the rigidity of the Italian labour market, a traditional view of gender roles within the family and the lack of adequate family policies result in Italy being one of the European countries with the lowest rate of women’s participation in the labour market. This, coupled with high female unemployment, produces very low employment for women (Flaquer, 2000).

Figure 16. Employment rates of mothers with children under six



Source: OECD, *Employment Outlook*, 2001

3.3.3 Family Policies and ‘Familialism’

As Flaquer (2000) puts it: “family policy [in Italy] is not so much to be found in the structure of welfare schemes for families, but in the assumption that families are crucial in providing support and services for dependent people”. Indeed, the family is perceived as a provider of income and resources and the underlying principle is that of ‘family solidarity’ (Flaquer 2000). And, while it may seem contradictory that a state in which family is valued so highly does not have provisions and protection schemes for families, it should be noted that precisely through its inaction, the state reaffirms the ideological assumption that family is the main provider in society (Flaquer, 2000).

Despite the centrality of the family, the Italian state has in place some kind of policies, such as paid leave and, to some extent, childcare services. Noticeably, cash benefits and child allowances are almost totally absent in the Italian family policy package. Italy provides a maternity leave that lasts five months with a compensation of the 80% of the original salary for women registered at The National Social Security Institute (Istituto Nazionale Previdenza Sociale – INPS). Such a provision applies to both part-time and full-time workers. The National Social Security Institute also grants a flat rate benefit to those women who are registered but have no access to maternity leave because unemployed or irregular workers. At the same time, those mothers who have no employment record and are not registered to INPS get a government assistance grant. On the other hand, fathers do not have a paternity leave. There is, however, a parental leave granted to both parents. Each parent can leave for six months, but the leave cannot surpass eleven months per child, with six of those eleven months covered by a 30% compensation of the salary and the remaining unpaid (Ray, 2008). It is also important to note that self-employed mothers and fathers are only partially covered by such provisions. Regarding childcare provisions, Italy scores low in availability with respect to the other European countries, especially for children under three.

Table 4. Proportion of young children using child-care arrangements

<i>(private and public, various types)</i>			
	<i>Year</i>	<i>Aged under 3</i>	<i>Aged 3-6</i>
Finland	1998	22	66
Norway	1997	40	80
Sweden	1998	48	80
Denmark	1998	64	91
Netherlands	1998	6	98
UK	2000	34	60
Ireland	1998	38	56
Germany	2000	10	78
Austria	1998	4	68
Belgium	2000	30	97
France	1998	29	99
Portugal	1999	12	75
<i>Italy</i>	<i>1998</i>	<i>6</i>	<i>95</i>
Spain	2000	5	84
Greece	2000	3	46

Source: OECD, *Employment Outlook*, 2001

While the availability of childcare for children over three is rather widespread across Italian regions, because children formally enter in the schooling system, for children under three there are marked differences across regions, with a greater proportion enrolled in the North rather than in the South.

It is important to note that, not only the number of children accepted per structure but also the weekly hours of childcare services are not compatible with full-time work, which is the predominating type of contract in the Italian labour force. Indeed, part-time work is not very common in Italy. However, as reported by Del Boca (2002) “the low proportion of part-time does not seem to be coherent with self-reported preferences. A large number of Italian women who are unemployed or out of the labour force report that they would actually prefer to work part-time”. Del Boca (2002) believes that the reasons for the absence of part-time should be found in the power of the unions, that “have traditionally opposed part-time employment fearing that potential divisions of the workforce (in terms of working arrangements, demographic characteristics, etc.) could reduce workers’ cohesion. At the same time, [...] social contributions paid by employers are proportional to the number of employees, not their hours worked, which makes the employment of two part-time workers more costly than one full-time employee”. Finally, it should be noted that the service sector, which traditionally allows a higher degree of freedom with regards to working schedules, is not that developed in Italy with respect to other countries (Del Boca, 2002). Nonetheless, improved family policies would have a significant impact not only on fertility, but also on women’s labour force participation. As reported in a study by Del Boca et al. (2009), “an increase of 10% in high quality part-time opportunities would increase the probability of working for better educated women from 79 to 84%, and from 53 to 63% for those with fewer years of schooling. Similarly, childcare availability has a positive effect on the probability of working, stronger for women with primary or secondary education. An increase of 10% in childcare availability increases the probability of working from 53 to 67% for the less educated group, and from 79% to 86% for those with tertiary education”. However, it should be noted that lacks in childcare services are partially compensated by the Italian families. Indeed, del Boca (2002) found that “the number of children under three under grandparents’ care is 45.7% in households where the mother works and 16.9% in households where the mother does not work. Among children between three and six years of age, the proportion of children under grandparents’ care is still very high: 39.9% when the mother works and 13.6% when the mother does not work”. However, it should also be noted that family support does not stop at child caring. Indeed, in absence of universal child benefits and child allowances, families provide income support to their children while they are looking for ‘protected jobs’. This support includes monetary transfers and explains why children tend to live with their parents even as adults. “The proportion of Italian children in the age group of 20-29 living with their parents is more than 70% while in other European countries [...] it is about 30-35%” (Del Boca, 2002).

Table 5. Percentage of Children 20-29 living with their parents in 1987 and 1995

<i>Country</i>	<i>Italy</i>	<i>France</i>	<i>Spain</i>	<i>Greece</i>	<i>Denmark</i>	<i>Sweden</i>	<i>UK</i>
<i>Year</i>							
1987	60	34	49	41	32	29	30
1995	71	33	59	49	29	23	31

Source: Eurostat, 1997

Source: Del Boca, 2002

Moreover, very often parents also assume responsibility for providing loans for housing purchases (Del Boca, 2002). Over time, this phenomenon has created an unfair distribution of resources across generations, where the elderly is entitled to home-ownership and large pensions. And, while this implies that families that managed to accumulate property will transfer it to the next generations, it also results in a greater difficulty for youngsters to start a family and an increase in inequality in the long-run (Flaquer).

3.4 France

3.4.1 Fertility Trends

Fertility in France has always followed a rather high trend. During the baby boom years, it peaked at 2,89 in 1963 and in the period 1960-1976, it oscillated between 2,85 and 2,01. Subsequently, fertility started a steadily decrease and, between 1977 and 2005, it remained below 2. In the years 1993 and 1994, fertility reached the minimum value of 1,73. In 2006 fertility increased to 2 and it has ever since remained rather constant, reaching 2,01 in 2015. It is worth noticing that, despite the economic crisis that started in 2008, France has been one of the few European countries to maintain a high level of fertility.

3.4.2 Between State Familialism and State Feminism

Despite its intricacy, the French welfare State, as well as the Italian one, has been considered by researchers as a mixture between a Beveridgian Welfare state, based on universalism and funded through general taxation, and a Bismarckian Welfare State based on fragmentation and contributions. And, according to researchers, such a duality can be found also in the family policy package, which

can be considered a blend of familism, mirroring the Southern European reality, and universalism aiming at gender equality, according to the Scandinavian model.

Historically speaking, “the present social security system, including statutory health insurance, officially came into being with the Ordinance of 4 October 1945 which aimed to cover all the so-called ‘social risks’. A reform of the organization of social security took place in 1967. It was separated into four branches: health insurance (which represents the largest share of expenditures devoted to social protection), pensions, family allowances, and insurance for work-related accidents and occupational illnesses” (Fagnani, 2006). It is important to note that, through time, the family policy branch of the Social security system has avoided retrenchment and cutbacks. The reason for this can be found in the importance that France has always given to family and fertility growth which can be traced back to the French revolution. Indeed, according to Revillard (2006), family in France has been granted a political importance due to its “demographic impact, to its role in social reproduction, and to its role as a symbol for representing the political order”. The need for the State to regulate the family was motivated by the willingness to have a “bureaucratic management of families” in competition with the Church for social control. Consequently, the Civil Code instituted by Napoleon, gave a legal regulation of the family that presented a gendered division of labor and a subordination of the wife to the husband. However, around the same time, women were encouraged to be part of the organized labor force, which triggered the birth of a legislation that aimed at the “protection of working mothers” (Revillard, 2006). Hence, as many have noted, France presents a real paradox in the sense that, while on one side great importance is given to the family, on the other side women have always been encouraged not to stay home but to actually seek work and be part of the labor force. The protection of working mothers included measures that were not taken in order to reach gender equality, but to encourage fertility while at the same time preserving women’s labor force (indeed the main target of such measures were working-class mothers). For instance, “in 1909, a legally ensured mother’s leave of eight weeks (to be taken consecutively before and after giving birth) was created, with a guarantee for the mother to retrieve her job after giving birth. The Strauss law, voted in 1913, created a *compulsory* post- natal leave of four weeks, with a daily allowance (that was a measure of assistance, and not insurance, and did not compensate for the lost wage). The law on social insurances of 1928–1930 represented the switch of protective legislation for mothers from assistance to insurance, with the creation of a maternity insurance, whose entitlement was based on the waged work status of the mother or derived from that of her husband. The insurance covered the medical fees, and ensured mothers an allowance to compensate for the lost wage for six weeks before and six weeks after giving birth” (Revillard, 2006). Another measure which was instituted around the middle of nineteenth century, was the creation of public preschools, with the goal to secularize the

education of young children. Regarding cash benefits to families, an initial family allowance was granted voluntarily by employers to the husbands. It was subsequently made compulsory in 1932. Moreover, the three children family model was promoted through the introduction of the “homemaker’s allowance (*Allocation de mere au foyer*), created in 1939 and turned in 1941 into a ‘single-pay allowance’ (ASU, *Allocation de salaire unique*), which was maintained in 1946 after the war. The ASU is an allowance provided to mothers staying at home full-time caring for their children. Combined with family allowances it represented in 1947 (at its peak), 90 per cent of a workwoman’s pay for a family with two children, and 150 per cent of a workwoman’s pay for a family with three children” (Revillard, 2006). However, from the 1960s onwards, new trends started to question such a familialist model. Indeed, factors such as a rapid increase in women’s labor market participation from all social classes; a crisis in the traditional institution of marriage demonstrated by an increase in divorce rates and a decrease in marriage and fertility; the rise of feminism and women’s movements against traditional social norms and fixed gender roles and the fact that women were for the first time perceived as a political stake by politicians, contributed to a focus on women’s condition. The first governmental body dedicated to women’s interests, the “women’s bureau (*Comité du travail féminin*)” was created in 1965 within the department of labor, followed by the appointment of a secretary of state in charge of ‘women’s condition’ (*Secrétaire d’Etat à la condition féminine*), Françoise Giroud, in 1974. Hence state familialism faced the rise of a potentially conflicting ideology, state feminism” (Revillard, 2006). In general, it should be noted that with the beginning of the Fifth Republic in 1958, the conversation was very much on women’s paid work and labor force participation.

3.4.3 Cash Benefits

France has a well-developed and intricate system of allowances that “provides families with a rich array of universal cash benefits which aim to lighten the financial burden for families irrespective of their income. These measures are successful in reducing the poverty rate among families, in particular lone parent families” (Fagnani, 2006). Among the various cash benefits available to families, we can find The Child Benefit, which represents the main and oldest cash transfer to families. In 1932, it was directed to all salaried workers, but, subsequently, in 1975, a law made all families eligible, independently from whether parents had a job or not. Generally, family allowances are not income-related and not taxable. In accordance with the aforementioned long-standing historical natalist approach, families with only one child are denied family allowances. However, as means to fight child poverty, families with just one child are entitled to other means-tested benefits if the child is under three years of age (Fagnani, 2006). As highlighted by Fagnani (2006), “the principal institution

in charge of family policy is the National Family Allowance Fund (CNAF), which covers around 90 per cent of all recipient families. Theoretically, the social partners (including family organizations) represented on the Executive Board of the CNAF periodically determine the orientations for intervention in family policy. In practice, decisions are made by the Government, whether approved or not by the Executive Board. It is solely at the local level that the Executive Boards of the CAFs have any real decision-making power, and in particular, a margin for maneuver in the provision and development of childcare services”. Regarding tax benefits, to encourage childbearing France has instituted the quotient familial that operates as follows: “the number of children is taken into account in calculating the tax liability, the total household income is divided by the number of family members, the relevant and progressive tax rate is applied to this income per adult equivalent (one ‘share’ for an adult, one ‘half-share’ for the first and second children, one ‘share’ for the third and subsequent children), and the resultant sum then multiplied by the number of family members. At the same income level, a family with three children will pay less than a family with only one child” (Fagnani, 2006). Finally, in 1985 the government has introduced the Allocation Parentale d'Education (APE, Child Rearing Benefit), a flat-rate benefit available for the parents (but in reality, for the mothers since about 98% of the beneficiaries are women) who would leave work to stay home with their child under three years of age, starting with the third child. Subsequently, in 1994, the reach of such a policy increased, since having a second child was the condition necessary to opt out of work. In 2004 the APE has been substituted by the Prestation D'Accueil du Jeune Enfant (PAJE), which is merges different allowances in a single cash transfer but does not substantially change the provision of the APE. As reported by Fagnani (2006) “this scheme has been successful among low paid or low qualified mothers”, who for a matter of salary were incentivized to stay home rather than work. Nonetheless, it is interesting to note how contradictory French policy appears, since while it promotes measures that result in keeping mothers away from work, at the same time it implements measures aimed at working parents. Another result of the APE was that, “since the nineties, the increase in funds allocated by the CNAF towards crèches has been modest when compared with the much higher funding allocated to childcare carried out by individuals and to the APE” (Fagnani, 2006).

3.4.4. *Childcare Services*

The expansion of public childcare services started between 1974 and 1980, when the nurseries and the family day care grew by 72% (Revillard, 2006). Indeed, “in the context of an acute labor shortage (there was a growing demand for qualified women to occupy jobs in the tertiary sector) policy-makers became increasingly receptive to the arguments of early childhood specialists in favor of crèches:

local Family Allowance Funds obtained additional funding to take partial responsibility for the running costs of public childcare services, including crèches, and to improve the quality of care for infants and young children” (Fagnani, 2006). It should be noted that the presence of Family Allowances Funds clearly eased the growth of childcare structures since “These bureaux took over the responsibility for developing the public day-care system by means of allowances awarded to local day-care centers. The fraction of social spending, within family policy, devoted to non-parental childcare increased significantly from the 1970s onward: 2 per cent in 1970, 12 per cent in 1980, 25 per cent in 1990, and about 30 per cent in 1998” (Revillard, 2006). It would seem, then, that the pre-existence of structures put in place with a familialist aim have been transformed into an asset in favor of women’s integration in the labor market. At the same time childcare services were expanding, in 1977, a law allowed childminders to register as proper employees. These figures “can care for up to three children in their own house, and they can also be regrouped in a family day-care centre” (Revillard, 2006). Such professional figures were created in order to allow parents more choice in terms of childcare availability, creating a more flexible form of child caring, cut rising unemployment by investing in the care sector and regularize the informal economy of caring. Moreover, two allowances were also created in order to encourage parents to hire childminders: the allowance for childcare at home (AGED, *Allocation de garde d’enfant à domicile*) in 1986, and the allowance subsidizing the employment of a licensed mother’s assistant (AFEAMA, *Aide à la Famille pour l’Emploi d’une Assistante Maternelle Agréée*) in 1990” (Revillard, 2006). In 2004, the AGED and the AFEAMA have also been substituted by the PAJE.

3.4.5 Parental Leave

In France, a maternity, a paternity and an adoption leave are available. The maternity leave consists in a maximum of sixteen weeks that mothers can decide whether to use to a full extent or not. They are obliged to leave for at least eight weeks and there are circumstances (such as the birth of twins) that may increase the leave (Ray, 2008). Paternity leave consists in eleven consecutive days of leave to which fathers can add other three days of family leave to reach a total of fourteen days of leave while the adoption leave consists of ten weeks (Ray, 2008). Maternity, paternity and adoption leave are paid at the usual wage. The aforementioned PAJE can be considered as a sort of parental leave that allows parents to take care for their child by dropping out of work or working part-time until the child is three. However, also another instrument called Shared Child-rearing Benefit (PreParE) allows parents to stop working or work less in order to take care of their child. The length of this benefit increases with the number of children and the amount payed depends on whether the parent has left work or only reduced his/her working hours.

3.5 Current situation and Future Challenges

As reported by Chesnais (1996), in the light of this analysis it could be possible to classify Western European countries in another typology, the one of 'nations of families' and 'nations of individuals', depending on the type of public policies directed to families. While in the 'nation of individuals' the main focus of public policies is oriented towards individuals, who are entitled to benefits independently from their social status, on the contrary, in the 'nations of families', the individual is considered entitled to benefits only in relation to his/her role in the family. However, it could be argued that this typology represents a simplification of reality since it should be considered that there is no uniform definition of family and its conception varies a lot across countries. For instance, while in Italy the family is conceived as extended and comprehending a wide array of relatives, in Sweden the nuclear family, usually arranged in non-traditional ways, is more common (Chesnais, 1996). Moreover, in this typology, countries such as Italy and Germany can both be considered to be part of the 'nations of families', despite the fact that German policies are usually more supportive to families than the Italian ones. At the same time, Britain and Sweden are considered to be nations of individuals, but, while in Britain the attention to the individual is motivated by a philosophy of non-intervention, in Sweden the State is the first promoter of welfare (Chesnais, 1996). Also, Gauthier (1996) reports another typology, which divides welfare states in four clusters depending on the objective of their family policies. Hence, "in the first group are countries defined as 'pro-family/pro-natalist'. These encourage families to have children principally by supporting women in reconciling work and family life. In the second regime, 'pro-traditional', the main concern is the preservation of the family, although governments take very limited responsibility for supporting it. The third type is termed 'pro-egalitarian', with its main aim the promotion of gender equality. In the last type, 'non-interventionist', the key concern is for families in need; social policies are typically means-tested and poverty-related, and women and families are left to reconcile work and child-rearing with little state intervention" (Del Boca et al., 2009). Despite the different attempts to classify welfare states and their policies, for what concerns the situation of women and the creation of policies that may help them in the conciliation of family and work, it should be highlighted the importance of breaking a cultural and political hegemony that imposes certain gender roles. As proved by France and Sweden, women's involvement in the political sphere (both by becoming policy makers and representing a political stake) has brought greater attention to their condition and interests. In Sweden, male political hegemony has been broken by a progressive inclusion of women. As reported by Chesnais (1996), "following the 1994 general elections the share of seats in Parliament (Riksdag) occupied by women was 41 percent, an international high-water mark. In the present social-democratic government, 11 of the 22 cabinet members are women. This is not a matter of tokenism; many of the female ministers

hold key positions, such as Deputy Prime Minister, Minister of Justice, and Minister of Foreign Affairs. The strong presence of women in political bodies means that their voice is heard and, through them, the interests of mothers and children are asserted". In France, reforms regarding 'women's issues' started to be implemented when politicians realized that women represented a political stake with specific interests and, ever since 1965, special bodies were created to promote women's participation in the work force and parity of opportunities between women and men (Revillard, 2006). Hence, it seems that a fundamental condition for women to reach emancipation would be being politically represented in order to add their issues to the conversation and allow their interests to be heard.

3.6. Conclusion

In this chapter, it appears that each country has implemented a unique family policy package depending on its history and cultural values. While in the case of Sweden, gender equality has always been a priority and the increase in fertility a side-effect, in France policies have historically been oriented towards natality and the gain of social control over the family, in an attempt to replace the Church. Conversely, in Italy the Church has played a strong role in defining the family as an institution and as the main provider of welfare, relegating the State to a secondary function. And, while it is difficult to assess the real impact of family policies on fertility, it appears clear that family policies can be used in order to 'correct' fertility trends such as postponement of first births, as in the case of the Swedish speed-premium. Furthermore, family policies do have an impact on women's condition. They may indeed empower women, allowing them to break the trade-off between work and motherhood, or they may penalize women, forcing them to choose between the two. Finally, it seems that women's empowerment seems to be the first step towards the achievement of higher fertility.

CONCLUSION

The answer to the question ‘can welfare policies successfully break the trade-off between employment and fertility’ is neither a single nor an easy one. The determinants of the low fertility trends that all OECD countries have witnessed are varied. Researchers have tended to link the phenomenon to the condition of women in the labor market and in society at large, and have advocated for a wiser use of welfare policies in order to, not only increase the levels of fertility, but also reach greater gender equality. It is possible to find structural and cultural conditions that have led to a decline in fertility. For instance, the integration of women in higher education and in the labor market, paired with a cultural change that has slowly eroded the traditional conception of the gender roles within the family and society, have been pivotal in the decline of fertility. Of particular importance has been women’s participation in the labor market. Labor market conditions have indeed played an important role in influencing fertility and the studies examined have highlighted how labor market conditions, the availability of part-time jobs and the entitlements to rights such as maternity leave, have contributed to help women in the conciliation between fertility and employment. Indeed, a number of family policies may be deemed as particularly importance for parents and, in particular, mothers. Amongst such policies we find cash transfers, both in the form of allowances and tax benefits; child-related leave entitlements (maternity, paternity, parental leave) and the provision of childcare services. These policies are those that help parents to be relieved by the burden of childbearing, and, for such a reason, are those that have proved to affect childbearing decisions. Different studies disagree on the intensity of the effect of each policy. However, it should be considered that it is rather difficult to assess the real impact of a policy package, especially on a variable such as fertility. That is, firstly, because the effects of policies are only visible in the long-run. Moreover, researchers have to face several methodological problems. Such problems range from formulating a satisfactory definition of the family policies one wants to study, to the difficulties deriving from using global measurements overlooking individual case studies. Finally, another difficulty is represented by the presence of many concomitant variations and side factors that may be hard to detect in assessing the effects of a policy. Regardless, these policies may constitute the space of maneuver for a state which wants to intervene in increasing fertility and, also, improving the situation regarding gender equality. The comparative approach undertaken in chapter three may be helpful to understand the strategy adopted by countries whose welfare state differs quite considerably. The analysis of the family policies of Sweden, France and Italy and their effect on women’s fertility and condition within society helps us understand how policies (or their lack) may be impactful. For instance, as shown, the presence of the ‘speed-premium’ in Sweden has, indeed, changed the pattern of childbearing, partially solving the problem of postponement of first births while at the same time

protecting women's labor position. The comparative analysis is also helpful in understanding the historical and cultural reasons that lay behind the approaches undertaken by each country. Thus, while in Sweden high fertility is a side effect of decades of policies oriented towards the achievement of gender equality in society, in Italy the lack of policies is motivated by the great importance attributed to the family, considered to be an institution and a welfare provider. Conversely, in France the picture is less clear-cut since, while on one side the state strives to reach a complete gender equality, on the other side it wants to assure a certain level of fertility by keeping women away from work through a series of policies such as the APE. In conclusion, it is important to stress that policies do have an impact on the life of individuals and that well thought family policies can indeed make a difference for women, helping them in the conciliation of childbearing and work. However, it should also be highlighted that some studies have suggested that a fundamental problem for women's interests is the lack of representation at the decision-making level and that only when women will reach positions of power policies centered on equal opportunities and work-family conciliation will be fully implemented.

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RIASSUNTO

Introduzione

Le politiche pubbliche e sociali rappresentano un importante strumento nelle mani dei governi per poter apportare cambiamenti alla società. È per questo fondamentale capire come e perché certe politiche risultino più efficaci di altre, soprattutto nel caso delle politiche indirizzate alla famiglia. Questa tesi si occupa dello studio dei provvedimenti che possano aiutare le donne a conciliare la partecipazione al mercato del lavoro con la maternità, comparando Svezia, Italia e Francia. Infatti, in un momento storico in cui si registra una bassa natalità in quasi tutti i paesi dell'OCSE, con alcuni paesi Europei che registrano una persistente bassa natalità, è importante cercare di capire, non solo il perché di questo fenomeno, ma anche come arginarlo. Infatti, una natalità bassa può avere gravi conseguenze a livello economico e sociale e, inoltre, potrebbe essere sintomo di un malessere generale legato alla situazione femminile, dato che molto spesso le donne si trovano a rinunciare o a posporre la maternità per poter privilegiare la carriera. La comparazione di tre realtà tanto differenti come Svezia, Italia e Francia sarà utile non solo per comprendere i diversi approcci al medesimo problema, ma anche per capire da quali contesti storici e culturali nascano certe politiche. Infatti, mentre in Svezia l'obiettivo primario delle politiche pubbliche è il raggiungimento della parità di genere, e l'incremento della natalità risulta essere un effetto secondario di queste politiche, in Italia la famiglia è considerata una vera e propria istituzione e 'welfare provider', capace di sopperire alle mancanze dello Stato. La conseguenza di questo approccio è che all'interno della famiglia i ruoli di genere sono rinforzati, in quanto alle donne rimane il ruolo di cura e assistenza mentre agli uomini spetta quello di 'bread-winner'. Infine, il modello francese è collocabile tra quello Svedese e quello Italiano, in quanto diviso tra l'importanza data alla famiglia e l'obiettivo di raggiungere la parità di genere.

Fattori determinanti per la fertilità e il ruolo delle politiche familiari

In conformità con quanto predetto dalla Teoria di Transizione Demografica, i paesi europei e il nord America sono entrati in una fase demografica caratterizzata da una bassa mortalità e natalità. Infatti, il tasso di natalità generale ha subito un declino considerevole, passando da 2.7 bambini per donna nel 1970 a 1.6 nel 2002. A livello Europeo, il declino è stato differenziato: i paesi del nord Europa hanno avuto un declino più precoce che però si è stabilizzato abbastanza presto, mentre i paesi del Sud Europa hanno assistito ad un declino più tardivo che però è tutt'ora in corso. Considerando che il tasso di natalità necessario per ottenere il cosiddetto livello di sostituzione (quel livello che garantirebbe la sostituzione della popolazione anziana con la popolazione giovane) è di 2.1 bambini per donna, nel 2015 l'Eurostat ha rilevato che il tasso di natalità generale nei 28 stati membri è stato

di 1.58. Nonostante una popolazione meno numerosa possa portare dei benefici a livello ambientale, in realtà un tasso di natalità basso dovrebbe preoccupare i governi nazionali. Infatti, la mancata sostituzione di una popolazione anziana aumenterà il tasso di dipendenza (il rapporto tra individui dipendenti e indipendenti in una popolazione). Ciò porterà delle conseguenze economiche dato che una riduzione della popolazione attiva comporta una riduzione nella crescita economica di un paese, e dunque una diminuzione del PIL. Inoltre, un numero limitato di lavoratori sarà costretto a sostenere un numero sempre crescente di anziani necessitanti di pensioni, sanità pubblica e servizi di cure, mettendo alle strette le finanze pubbliche del paese. Proprio perché un declino della fertilità può comportare tutti questi rischi, è importante cercare di capire quali sono state le sue ragioni. I ricercatori hanno identificato ragioni sia strutturali che culturali, che hanno eroso la fertilità nei paesi sviluppati:

1. Incremento dell'educazione femminile: il tasso di donne che raggiungono l'educazione terziaria è aumentato enormemente negli ultimi anni. La relazione tra un alto livello di educazione e la fertilità è stata per molto tempo considerata negativa, in quanto un alto livello di educazione incrementa il costo di opportunità per le donne nel fare i figli. Ciò nonostante, dagli anni '90 in poi, è stato dimostrato che la correlazione negativa tra educazione e fertilità in realtà non sussiste, infatti il declino di fertilità sembra essere più marcato per le donne meno educate. È comunque chiaro il fatto che un aumento del grado di educazione femminile porta ad un posticipo della gravidanza.
2. Incremento del salario e del costo di opportunità: secondo la teoria economica della fertilità, il numero di figli che una famiglia è disposta a fare dipende da i costi diretti e indiretti di ogni singolo bambino. Mentre i costi diretti sono rappresentati dai costi necessari al sostentamento del bambino, i costi indiretti sono rappresentati dal costo di opportunità che equivale al costo delle opportunità perse nel fare un figlio. Ovviamente più è alto il salario, più è alto il costo di opportunità. Allo stesso tempo, però un alto salario andrebbe a sopperire i costi diretti, creando dunque un conflitto fra un 'price effect' e un 'income effect'.

Questa teoria è affiancata anche dalla teoria di Easterlin, che invece suggerisce di tenere conto dei guadagni delle coorti di genitori. Infatti, dato che le decisioni riguardanti la fertilità vengono prese in base alla prospettiva e all'aspettativa dei futuri stili di vita, se i guadagni della coorte successiva sono sostanzialmente minori dei guadagni della coorte precedente, allora è meno probabile che la coorte successiva abbia un tasso di fertilità tanto elevato quanto quello della coorte precedente.

3. Condizioni del mercato del lavoro: è stato provato da diversi studi che le condizioni del mercato lavorativo sono estremamente importanti nell'incoraggiare o scoraggiare la fertilità,

e che la presenza o meno di bambini funge da elemento discriminatorio nell'assumere o meno le donne. Inizialmente, si pensava che ci fosse una relazione negativa tra la fertilità e la partecipazione al mondo del lavoro. Ma, negli ultimi anni, gli studi hanno dimostrato l'opposto: nel 2000 i paesi con una minore partecipazione delle donne al mondo del lavoro hanno registrato una minore fertilità. Il fenomeno è spiegato dal fatto che ogni paese fornisce alle donne degli strumenti per conciliare la vita privata con quella lavorativa, e tali strumenti influenzano le decisioni riguardanti la fertilità.

4. Composizione familiare: anche la composizione della famiglia influenza la fertilità. In generale i paesi dove prevale una struttura tradizionale della famiglia sono quelli dove la fertilità rimane più bassa. Il matrimonio non sembra dunque essere una condizione necessaria per avere un'alta fertilità.
5. Cambiamento culturale: la percezione della donna all'interno della società, del suo ruolo e dei suoi doveri è cambiata moltissimo nel corso del tempo. Per le nuove generazioni valori quali l'indipendenza, l'autodeterminazione e la libertà di disporre di una carriera sono cose fondamentali.

Per cercare di arginare il fenomeno della bassa fertilità, i governi possono implementare dei programmi di politiche pubbliche specificamente indirizzate alla famiglia. Tra le misure adottate che hanno una maggiore efficacia nel consentire alle donne di conciliare la maternità con le opportunità lavorative, abbiamo i benefici fiscali; i congedi di maternità e paternità e i servizi relativi alla cura del bambino. Ogni paese implementa misure diverse a seconda anche della percentuale di PIL destinata a tali spese.

Regimi di welfare e Politiche Familiari

I ricercatori hanno effettuato diverse classificazioni riguardanti il welfare state. La più autorevole è la tipologia delineata da Esping-Andersen, il quale ha diviso i welfare state europei in tre regimi: il regime liberale, il regime conservatore e quello social-democratico. La differenziazione deriva dai diversi percorsi storici e culturali che si trovano alla base di ogni regime. Questi percorsi influenzano i requisiti necessari per avere diritto al welfare, quali diritti sono garantiti e gli obiettivi ai quali i vari programmi di welfare ambiscono. Nella sua analisi, Esping-Andersen si focalizza sul concetto di de-mercificazione dei lavoratori. Facendo ciò, però, tiene conto solo della forza lavoro che in genere è prevalentemente maschile, essendo le donne molto spesso relegate a casa a svolgere lavoro di cura non pagato. Questa è la critica femminista apportata a Esping-Andersen da Lewis e Sainsbury, le quali sostengono che la sua tipologia trascura totalmente la donna e che, se essa venisse presa in considerazione, la tipologia di Esping-Andersen risulterebbe fortemente modificata. Per questo,

Lewis propone un'altra tipologia di welfare basata sul concetto di de-familiarizzazione, ovvero il grado di libertà dalla famiglia garantito alle donne dalle politiche pubbliche. La sua tipologia divide gli stati in tre grandi gruppi: gli stati fortemente basati sul modello dell'uomo breadwinner sono quelli con il grado minore di de-familiarizzazione, vi sono poi gli stati moderatamente basati sul modello dell'uomo breadwinner e quelli debolmente basati sul modello dell'uomo breadwinner. Sainsbury sostiene che i requisiti necessari per godere dei vari benefici di welfare sono essenziali per la de-familiarizzazione della donna. Gli stati, come la Svezia, che garantiscono alla donna l'accesso al welfare in quanto individuo (anziché moglie o madre), sono quelli che garantiscono non solo una maggiore eguaglianza ma anche una chance in più nella conciliazione tra lavoro e maternità. Riguardo poi lo studio delle politiche familiari nello specifico, i ricercatori affrontano diverse difficoltà nel cercare di capire il vero impatto di tali politiche sul livello di fertilità. Innanzitutto, non c'è una vera e propria definizione di politiche familiari. Inoltre gli studi effettuati tendono a tenere conto di misure globali, trascurando i casi individuali. Inoltre, nel cercare di misurare l'impatto di tali politiche sulla fertilità, si deve tener conto dei limiti rappresentati tanto dalle misure globali di fertilità quanto dalle misure delle coorti. Infine, è molto complesso cercare di capire il reale effetto delle politiche pubbliche quando queste interagiscono con variabili concomitanti e fattori collaterali, considerando anche il fatto che l'effetto delle politiche potrebbe non essere lineare. Infine, i risultati delle politiche pubbliche sono difficili da vedere, non solo in quanto agiscono a lungo termine ma anche perché non si può escludere che non siano solo le politiche a influenzare il comportamento ma anche il comportamento a influenzare le politiche. Gli studi che hanno cercato di accertare l'impatto delle politiche pubbliche sulla fertilità sono divisibili a seconda del metodo utilizzato nel raggiungimento del loro scopo. Sono divisibili in:

1. Studi che si focalizzano su prove empiriche basate sull'opinione pubblica e analisi statistiche descrittive;
2. Studi che si focalizzano sulla relazione tra fertilità e politiche pubbliche attraverso i percorsi storici degli stati;
3. Studi che si focalizzano su un'analisi a due variabili trasversale;
4. Studi che si focalizzano su un'analisi statistica a più variabili tramite l'uso di dati di micro e macro livello.

Gauthier ritiene che il metodo più affidabile sia l'ultimo menzionato, perché permette di isolare l'impatto delle politiche sulla fertilità rispetto ad altri determinanti. La maggior parte di questi studi ha dimostrato che i trasferimenti monetari e le agevolazioni fiscali riguardanti i bambini hanno un impatto positivo sulla fertilità. Gli studi che invece si sono occupati di definire l'impatto delle politiche legate più strettamente al mondo del lavoro, come ad esempio la presenza di congedi di

maternità e paternità, hanno dimostrato la presenza di una correlazione positiva ma debole, benché alcuni studi abbiano dimostrato l'assenza di qualunque impatto. Importante invece la correlazione tra il lavoro part-time e la fertilità, che risulta essere positiva. Positivo è anche l'impatto dell'esistenza di strutture ben funzionanti e organizzate che possano garantire la cura di bambini.

Politiche di welfare e il loro impatto sulla fertilità: un'analisi comparativa

L'analisi comparativa si basa sullo studio delle politiche sulla famiglia attuate in Svezia, Italia e Francia. Per quanto riguarda la Svezia, dopo un picco di fertilità raggiunto nel dopoguerra in coincidenza con il baby boom, la fertilità del paese ha cominciato a diminuire durante gli anni settanta per poi risalire a partire dagli anni ottanta. Durante gli anni novanta, in un periodo che coincise con una vera e propria crisi economica per il paese, la fertilità diminuì sensibilmente. Infine, negli anni duemila la fertilità ha ripreso a salire, rimanendo per adesso ad un livello abbastanza alto (1.88). Da notare che in Svezia il problema principale è il rinvio della prima gravidanza, in quanto il sistema svedese di politiche pubbliche è costruito in modo tale da favorire le donne che hanno già avviato una carriera stabile. Nell'analizzare le politiche pubbliche, e in particolare quelle incentrate sulla famiglia, è importante sottolineare come, in Svezia, l'obiettivo principale di queste politiche sia il raggiungimento di una piena uguaglianza di genere. Il fatto che tali politiche abbiano poi aiutato a favorire un'alta fertilità può essere considerato un mero effetto collaterale. Per quanto riguarda il congedo dal lavoro, in Svezia esistono maternità, paternità e un congedo disponibile a entrambi i genitori. È stato dimostrato da alcuni studi come la possibilità per i padri di assentarsi dal lavoro favorisca la fertilità della famiglia. Inoltre, un'altra misura introdotta per compensare il problema del rinvio della prima gravidanza, e incentivare le donne a fare altri figli senza penalizzarle, è stata l'introduzione dello speed-premium, un meccanismo che permette alle donne che hanno un secondo figlio entro 30 mesi dal primo di prendere gli stessi benefici ricevuti lavorando a tempo pieno prima della prima gravidanza. Questa misura è riuscita a cambiare il comportamento e la fertilità delle donne svedesi. Inoltre, in Svezia è disponibile un ottimo sistema di asili, che si distinguono sia per quantità e adeguatezza delle strutture che per qualità. I benefici monetari, infine, sono in Svezia abbastanza consistenti e a livello adeguato rispetto alla media Europea. In Italia la situazione è differente. L'Italia registra uno dei più bassi tassi di fertilità in Europa, avendo registrato meno di 1.5 per oltre venticinque anni. Il problema in Italia è di tipo culturale, dato che la famiglia è considerata alla stregua di un'istituzione e dunque come dispensatrice di welfare. Le politiche dirette alla famiglia sono quindi costruite considerando il ruolo dello stato come marginale. Infatti, benché l'Italia disponga del congedo di maternità (ma non di quello di paternità), non dispone di adeguate misure per ciò che riguarda gli asili e le strutture di cura dei bambini. I nonni risultano quindi essere importantissimi

nella cura dei bambini. La Francia può essere considerata un caso intermedio tra quello svedese e quello italiano. Infatti, in Francia, le politiche di welfare sono divise tra l'avere uno scopo apertamente incentrato sull'incoraggiare la natalità e il desiderio di ottenere una completa parità di genere. Per questo, benché ci siano numerose misure per permettere alle donne di conciliare la vita pubblica e lavorativa con quella privata, frutto di battaglie femministe iniziate a partire dagli anni settanta, vi sono anche misure pensate per disincentivare le donne dal lavorare. Per esempio, l'Allocation Parentale d'Education (APE) è un sussidio disponibile per quei genitori che decidono di lasciare il lavoro per stare a casa con i loro figli, a partire prima dal terzo e, successivamente, dal secondo figlio. Il panorama francese risulta quindi quasi paradossale, con misure molto spesso contrastanti e in conflitto tra loro.

Conclusione

In conclusione, le politiche pubbliche, anche quelle dirette alla famiglia, possono avere un impatto sulle vite degli individui. È importante considerare che le politiche pubbliche vengono pensate e implementate quando c'è un interesse forte da soddisfare o una problematica urgente da risolvere. Nel caso delle politiche che possano aiutare le donne a conciliare la loro vita lavorativa con quella familiare, è importante che le donne stesse siano rappresentate a livello politico o che, a livello di elettorato, indichino con precisione quali sono i loro interessi, per arrivare a un'emancipazione completa.