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Care work for elderly people in different welfare regimes:  
the cases of Italy, Germany and Denmark

This paper presents a comparison of the incidence of immigrant labour force doing care work for frail elderly people in three Western European states: Italy, Germany and Denmark, relating it to the role of women within households and in the labour market for each one of these three nations, where different policies about dependency in old age are operating. These three states are chosen as case-studies representing different welfare models in Western Europe: Christian democratic residual, corporatist and social democratic, where Italy is an example of Christian democratic residual welfare state, Germany of a corporatist one and Denmark of a social democratic one. The terminology chosen derives from an adaptation of the most quoted typology: liberal, conservative-corporatist and social democratic welfare regime, formulated by Gøsta Esping-Andersen (1990), who put both Italy and Germany among the conservative-corporatist welfare states.

We will put to comparison facts and data<sup>1</sup> about care for the elderly in these three advanced nations, and confront some theoretical questions. First of all, we must account for the chosen typology and terminology.

**Two, three or more welfare state models?**

For the purpose of my research the relevant dimensions are really inspired by the typology proposed by Diane Sainsbury (2001). Sainsbury describes two idealtypes of family and working life configuration, where the primary elements in the fabric of society are on one side the individual (or a couple composed by equals), and on the other the unit composed by a man leading his dependents, also called The Family. Commitment to either vision is, in my opinion, the truly basic motive of

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<sup>1</sup> We will rely on secondary sources. Data that would be fit for this analysis but were not at the public disposal are the different waves of the European Household Panel (EHCP), and of the Labour Force Survey (LFS), still under embargo. The international project MTUS, on time use surveys, is developing a dataset with comparable data, but the data presently at the public disposal are not very recent.

the political forces acting in favour of different social policy models in a number of fields of contemporary social politics. Sainsbury traces a simple dichotomy between the “male breadwinner” model versus the “individual” model: their dimensions are showed in the following table.

<b>Dimension</b>	<b>Male breadwinner model</b>	<b>Individual model</b>
<i>Familial ideology</i>	Celebration of marriage Strict division of labour Husband = earner Wife = carer	No preferred family form Shared roles Father = earner/carer Mother = earner/carer
<i>Entitlement</i>	Differentiated among spouses	Uniform
<i>Basis of entitlement</i>	Breadwinner	Citizenship or residence
<i>Recipient of benefits</i>	Head of household	Individual
<i>Unit of benefit</i>	Household or family	Individual
<i>Unit of contributions</i>	Household	Individual
<i>Taxation</i>	Joint taxation Deduction for dependants	Separate taxation Equal tax relief
<i>Employment and wage policies</i>	Priority to men	Aimed at both sexes
<i>Sphere of care</i>	Primarily private	Strong state involvement
<i>Caring work</i>	Unpaid	Paid component

*Dimensions of the two models of social policy*  
*Source: Sainsbury (2000, 124; 1994, 153).*

In recent decades, the process of commodification of the population’s labour force, has drawn women into the quest for a dependent job, not only women who belong to the lower strata, as at the time of the industrial revolution in each country, but also those who come from the middle class. It is basically this process that is giving the fundamental push to shift from the first model of society to the second, a process that is contrasted by the desire of men to control women, by fortifying in different ways the institution of “The Family”, that is the male breadwinner model. The current state of affairs in each country is the result of these two opposite forces. The tension towards an individual model is expressed by states’ interventions constructing a public welfare net, with the provision of services for people in need of care: the children, the frail elderly and the sick, a provision that pertains to the women’s role. In the welfare states with socialist inspiration there are even publicly organised canteens in the People’s Houses, as in Denmark, “defamilializing” preparation of meals for a small price. Furthermore, expansion of the welfare state enhanced participation of women to the workforce, since the caring jobs created by the state are predominantly applied for by women (Stryker and Eliasson 2002).

The ideology of the welfare state is exactly the opposite of the subsidiarity principle (that the E.U. has adopted in the Maastricht treaty intending to inscribe it at the constitutional level<sup>2</sup>): needs must be met in a social way, in order to guarantee equality (Borchorst 1994). Again, this is another

<sup>2</sup> The principle of subsidiarity, theorized in official documents of the Vatican, is inscribed in the German Constitution.

expression of the tension towards the individual model. A very interesting notation by Esping-Andersen recognized the validity of a simple dichotomy: “Northern countries’ welfare states confirm themselves to be the only ones capable to defamilialize. In liberal and continental regimes, the burden of care responsibilities carried by the families seems to be more or less the same, regardless how it is measured” (2000, 112-113). Lesemann and Martin, editors of a book about assistance to the elderly with contributions from all over Western Europe, write in their introduction at the beginning of the Nineties: “the wife is the first to assume the role of assistant; if there is no wife, the daughter will do it, then a daughter-in-law follows. Then extended family members (if there are), sons, female friends and male friends. We can calculate that in between 70 and 80% of the cases, help comes from women. Not completely absent, men intervene especially when they are the only child, or when the family is composed only by men. In conclusion, it is right to conclude that when one talks about family, essentially women are meant, first of all those unmarried or without children” (Lesemann and Martin 1994, 241).

The Scandinavian countries are undoubtedly different from the other Western European countries: they are much more oriented to be a society of individuals, with women taking for granted to be able to pursue a career, while Italy and Germany should be put in the same male breadwinner model or familistic idealtyp. Italy is a paradigmatic case of breadwinner model, but there as an ample body of research stressing the continuing importance of the breadwinner model also for Germany<sup>3</sup> (the latest: Abrahamson 2005). Data from surveys on opinions about gender roles also corroborate this statement. Eurobarometer 44.3, gathered in 1996, apparently did not show a very big difference in the general question of felt legitimacy of female participation to the labour force in the three countries. But the answers to a question with which the two sexes are pitted against each other revealed that a favour for discrimination of women in favour of men was diffuse among German and particularly Italian respondents. Even Italian and German women (again the latter in less proportion) agreed to give priority to men in the paid work sphere.

<i>I tend to agree that it is just as important for a woman to have a job than it is for a man</i>	Men	Women
Denmark	91	92
Germany	80	87
<i>West</i>	76	84
<i>East</i>	94	98
Italy	87	89

*Views by women and men about employment, 1996*  
Source: Plantega and Hansen 1999, p. 366.

<sup>3</sup> Sainsbury (1999) writes about the importance of the tax system to encourage or discourage participation to paid work by women: for example in Germany the tax system, based on splitting the income of the married couple, favours particularly men with a high income married to a housewife, and discourages their wives’ search for work.

Note the big difference between the two parts of Germany: in the former GDR the respondents' agreement with participation of women to the labour force was at the maximum level, reflecting everyday reality in the socialist system (Rudd 2000).

<i>I tend to agree with the following statement: when jobs are scarce, men should have priority over women</i>	Men	Women
Denmark	8	11
Germany	37	26
<i>West</i>	39	29
<i>East</i>	32	17
Italy	48	38

*Views by women and men about employment, 1996*

*Source: Plantega and Hansen 1999, p. 366.*

The picture looks analogous if we look at recent data, like the “Family and gender roles” latest waves of Issp in 1994 and 2002 (though Denmark did not participate in 1994 nor Italy in 2002). In the following tables, adhesion to traditional gender roles reveals to be a declining feature in Germany – and in Italy as well, judging from the social climate<sup>4</sup>. These societies are nevertheless still far from each other in terms of the dominant concepts.

<i>A man's job is to earn money; a woman's job is to look after the home and the family</i>	Men 1994	Women 1994	Men 2002	Women 2002
Denmark	-	-	15,4	12
Germany	34,7	29,8	24,2	19,6
<i>West</i>	40,2	34,1	26,1	20,6
<i>East</i>	11,1	11,3	14,9	14,5
Italy	38,9	27,9	-	-
<i>North West</i>	33,6	28,4	-	-
<i>North East</i>	36,8	25	-	-
<i>Centre</i>	33,7	22,6	-	-
<i>South and islands</i>	45,9	32	-	-

*Opinions about gender roles. Sources: ISSP 1994 Family and Changing Gender Roles II, ISSP 2002 Family and Changing Gender Roles III<sup>5</sup>*

<sup>4</sup> The most recent Italian data about gender roles that I am aware of have been gathered only among 15-29 years old. The most significant question was: “Is it right that the man should be the master at home?” answered positively by 18,7% of the male and 3,7% of the female, a question, admittedly, difficult to compare with the Issp questions (Leccardi 2002, 232).

<sup>5</sup> Data references: International Social Survey Program (ISSP): FAMILY AND CHANGING GENDER ROLES II, 1994 [Computer file]. ICPSR version. Koeln, Germany: Zentralarchiv fuer Empirische Sozialforschung [producer], 1997. Koeln, Germany: Zentralarchiv fuer Empirische Sozialforschung/Ann Arbor, MI: Inter-university Consortium for Political and Social Research [distributors], 1997.

<i>Being a housewife is just as fulfilling as working for pay</i>	Men 1994	Women 1994	Men 2002	Women 2002
Denmark	-	-	37,9	42,3
Germany	43,1	42,5	43,6	25,3
<i>West</i>	48,7	47,6	46,4	25,7
<i>East</i>	19,3	20,5	30,2	23,5
Italy	32,8	22,3	-	-
<i>North West</i>	25	28,3	-	-
<i>North East</i>	36,5	23,1	-	-
<i>Centre</i>	26,7	15,5	-	-
<i>South and islands</i>	39,7	21,5	-	-

*Opinions about gender roles. Sources: ISSP 1994 Family and Changing Gender Roles II, ISSP 2002 Family and Changing Gender Roles III*

Eastern and Western Germany are slowly converging, with Western German women dropping their support to traditional gender roles, without reaching the Eastern German women's levels of refusal, that it is still under Danish levels – though answers to the second question reveal a surprising high Danish agreement with equal satisfaction for women in work and in being a housewife, especially for Danish women, who are rarely housewives. Surprisingly, Italian data of 1994 showed a less traditional opinion about gender roles than German ones of the same year<sup>6</sup>. Italian regional data reveal the expected traditionalism of the South and of the islands, while the Centre has the lowest level of Italy among women. The North East and the North West give different opinions, but with rather incoherent patterns, if we confront men and women across the two questions. The absolute number of this analysis are not very high, though: sample size for Italy is 1018.

We must conclude that the proportion of opinion in favour of traditional gender roles was (and presumably is) quite similar between Italy as a whole and Western Germany. Apart from the regional differences, a common heritage of Christian Democratic rule modelling the relationship between the state and the family unites Italy and the German Federal Republic (in the former German Democratic Republic, where traditional gender roles do not have legitimation, lives only 17% of the population). This clustering together of Italy and Germany is found again in a more complex model: Esping-Andersen's tripartition, which is based on the dimensions showed in the following table<sup>7</sup>.

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International Social Survey Program (ISSP). INTERNATIONAL SOCIAL SURVEY PROGRAM: FAMILY AND CHANGING GENDER ROLES III, 2002 [Computer file]. ICPSR version. Cologne, Germany: Zentralarchiv für Empirische Sozialforschung [producer], 2004. Cologne, Germany: Zentralarchiv für Empirische Sozialforschung/Ann Arbor, MI: Inter-university Consortium for Political and Social Research [distributors], 2004.

<sup>6</sup> In Eurobarometer 59, 2003, all three countries have questions about gender roles, but while the unweighted results show a surprising enhancement of Italian adhesion to equality, weighted scores give an indistinct picture of the three countries, reducing (halving for Denmark and Italy) the support to gender equality in all of them.

<sup>7</sup> Huber and Stephens (2001), who analyze the development of welfare states with a path dependency approach, use the same tripartition, merely changing the name of the "conservative-corporatist" category in "Christian democratic".

<b>Dimension</b>	<b>Liberal</b>	<b>Social democratic</b>	<b>Conservative</b>
<i>Role of the family</i>	Marginal	Marginal	Central
<i>Role of the market</i>	Central	Marginal	Marginal
<i>Role of the state</i>	Marginal	Central	Subsidiary
<i>Welfare state: social unity of solidarity</i>	Individual	Universe of the individuals	Kinship Corporations State
<i>Welfare state: prevalent place of solidarity</i>	Market	State	Family
<i>Welfare state: degree of decommodification</i>	Minimum	Maximum	High (for the male breadwinner)
<i>Welfare state: modal examples</i>	Usa	Sweden [Denmark]	Germany, Italy

*Dimensions in the three welfare regimes*  
Source: Esping-Andersen (2000, 146).

It is a typology that does not take into consideration unpaid work at all, in a framework where the economic value of unpaid work is negligible, as the following quote reveals: “To support housewives, male earners must rely on high net take-home pay”<sup>8</sup> (Esping-Andersen 1990, 227). The analysis of decommodification in Esping-Andersen’s terms, that is of its extent by means of welfare provisions, has been deemed incomplete: “Feminist analysis”, writes Jane Lewis (1997, 166), “has showed that this question could only effectively be asked of men and that the measures used captured merely men’s behaviour”<sup>9</sup>.

But let us nevertheless look at this proposal, the most debated. While it is not controversial to situate Denmark in the socialdemocratic (or “institutional” in the words of Richard Titmuss) regime, the clustering together of Italy and Germany in the same “conservative regime” slot by Esping-Andersen leaves the Italian scholar quite perplexed because there is too much difference between the German and the Italian welfare states. Germany is a much richer country, with reliable welfare provisions for a much greater number of people (including students, disabled, and the frail elderly, with an insurance covering the risk of disability, as we shall see in detail), good services organized by public authorities (though child care provisions are prevalently cash benefits) and with much stronger social movements pushing for social and economical innovations, while in Italy the

<sup>8</sup> It is worth reporting the whole phrase: “To support housewives, male earners must rely on high net take-home pay; to support the welfare-state clientele, the employed will have to pay heavy taxes. And this is where the greatest potential for a conflict-axis appears”. The idea of the welfare state as a socialization of risks in case of being unemployed, have disabling accidents, getting old, is completely lost. This is indeed the picture of a society of individuals, but of very short-sighted ones.

<sup>9</sup> Korpi (2000) has included gender inequality analysis, but in the end has basically confirmed Esping-Andersen’s tripartition.

public welfare provisions are very small, mainly delegated to the local governments, that have very variable resources and capacity across the country, and where the Catholic culture, on the rampage in the latest years, still organizes a big portion of the assistance to people in need (though with public funding). The overall level of the Italian welfare policy would fit more into Titmuss' residual model and Esping-Andersen's liberal regime (the synthetic indicators in *Three Worlds of Welfare Capitalism* show in fact that Italy is very close to the liberal regimes' lowest level of provisions), were not for the fact that the social doctrine of the Church is more influential than a liberal stance as ideological motive for the current state of things<sup>10</sup>. Therefore my denomination of Italy as a "residual" welfare state, not of the liberal cluster (in Esping-Andersen's terms) but rather of a Christian democratic type. These observations of course apply also to the simple dichotomous model elaborated by Diane Sainsbury.

Ferrera (1996), Trifiletti (1999), León Borja (2001) and others have already defined a peculiar type of welfare state for Southern European countries in general, significantly called "gathering breadcrumbs" by Trifiletti. The reply by Esping-Andersen (2000, 154 ff.) defending his "three worlds" is based on quantitative analysis, that can be influenced by the choice of indicators: to my opinion it does not bring sufficient evidence of the closeness of the Continental and the Southern European models. Another argument in the same book (p. 117) is that Southern European countries do not penalize dual earner families, therefore they can be grouped together with more active states, like the Central European. The real question indeed seems to come down to which indicators the researcher judges most valid.

Let us then take a closer look at the elderly care sector. Social care services for children and for the frail elderly were taken into consideration by Anttonen and Sipilä (1996) to elaborate a typology of welfare states for the 14 nations examined: E.U. and Scandinavia. These two researchers identified four clusters: the Nordic countries had abundant (that is, above the mean) public care for both categories, while another group of countries, Germany included, had scarce social services for both; a group that included Italy had abundant services for children but not for the elderly, while the last group had the opposite situation: scarce services for children and abundant for the elderly.

But it is really still so? Are Germany and Italy so close in respect to elderly care? Are public provisions the ultimate touchstone to compare the situation of the elderly and assess a similarity? This picture is corrected by the same authors, pointing out that in Germany there are religious organizations and private care services that partly relieve families of the care burden.

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<sup>10</sup> The different development of welfare states has been read by Siaroff (1994) as depending on the influence of social democratic parties that contrasted the Christian Catholic parties who defended the subsidiarity principle, while the Protestant side has been less militant on this subject, privileging individual rights.

In Esping-Andersen's work, too, we find a synthetic table with a very different picture in the continental regime and in the Mediterranean Europe (though data have gotten rather old).

	Public expenses in services to families (% on BNP) 1992	Public child care as % of children under 3 years (1980's)	Home assistance in % of elderly people 1990
Socialdemocratic regime	1,85	31,0	19,5
(Liberal regime)	0,21	1,9	4,3
Continental regime	0,37	9,2	4,3
Mediterranean Europe	0,09	4,7	1,3

*Defamilization in different regime types*

Source: Esping-Andersen 2000, 110 (various sources, elaborations on Oecd data)

Let us then come back to the question of choosing a typology in the conclusions, after having examined our countries' frail elderly care organization in detail. Before this, a last theoretical section, where we will discuss some important points regarding the concept of "decommodification".

**Issues about decommodification**

The debate about welfare regimes has underlined the importance of examining not only state policies that decommodify services, thus partially liberating the lowest social classes from market dependency, but also the incidence of unpaid work performed essentially by women within family, kinship and also friendship's networks: we should not overlook this third possibility (that is family, kinship and network besides the state and the market) to fulfil the individual's needs. This tripartition mirrors the three modes of economic exchange of Polanyi's categorization: market exchange, redistribution and reciprocity – or rather of his vulgate, since in fact Polanyi spoke also of a fourth mode, "householding" (that includes slave labour) (Polanyi 1974). The first three modes pertain to the relationship among basic social units, while householding represents the economic aspects within the basic social unit. Polanyi's categorization has its roots in the Marxian analysis of labour as a commodity, from which a profit – the *primum mobile* of the contemporary mode of production – can be extracted, and he shares the same Marxian opposition to this mechanism, looked upon as a danger for the well-being of society. This is the original inspiration for Esping-Andersen's concept of decommodification.

An interesting debate started in the heyday of the second wave of the women's movement: it was about finding the correspondent to "profit" that is extracted in the economical exchange within the family: orthodox Marxists have denied its existence, but at least one strain of contemporary Marxism (the world-system theory) recognizes the importance of "semi-proletarian" households for



the extraction of a bigger labour surplus from workers, when they are replenished by a non-capitalist sector with goods and services for self consumption (Wallerstein and Smith 2003, Moulier Boutang 2002). The “free wage-earning worker” is just a species of the “subordinate employee” genus, that includes other species as the “slave” and the “semi-proletarian”: all of them can be exploited by capitalists in the same way; the choice of who will be put to work regards just the relative price of each, variable with the circumstances. There is no clear tendency towards a diffusion of free labour: it all depends on the relative price of a worker, of a slave, or of a semi-proletarian who can count on his/her relatives for sheer subsistence. Free meals do exist: they are provided by wives, daughters, slaves and Nature.

The feminists in the Seventies put it in this way: “If every worker would ask in his share of salary-goods necessary for survival: cooked meals, laundry, tailored and repaired suits, home cleaning services, etc., the value of these means of substance would be so high to lessen considerably the plundered surplus” (Del Re 1979, 17). Some, as Christine Delphi (1998), would even argue that the surplus would completely disappear, and this event becomes more and more likely as the cost of labour grows in developed societies. Domestic mode of production, as she calls it, are the shoulders on which the capitalist mode of production prospers, and its central institution is marriage, aimed to extract work without reward from a part of the population, married women *in primis*, but also cadets (whose exploitation is temporary). Marriage contract, in sum, is a work contract, where the bride is bound to be poorly rewarded in kind for the work she is obliged to furnish.

In this frame of reference, the “decommodification/commodification” debate about the position of women looks somewhat theoretically confused. The main point, correctly addressed by feminist researchers (Lewis 1992 and 1997, O’Connor 1993, Orloff 1993, among others) is that the alternative to commodification is not a single one, but a choice between state’s intervention or recourse to family/kinship/network on a reciprocity base: decommodification can translate in redistribution, reciprocity or householding. If the subject of the story is a male worker, his “decommodification” in general might mean increasing just the “householding” workload of his wife, or the “reciprocity” workload, also normally performed by females, and not just “redistribution” with the use of services organized by the welfare state. In general decommodification can easily translate in an increased exploitation of women by men within families.

Feminist researchers argue that Esping-Andersen’s description of welfare regimes – though he clearly states that the sense in which he uses “decommodification” equals “redistribution by the state” – lacks every consideration for the family, as the third pillar of economical exchange besides the state and the market. What the wife would need instead, in general terms, is *more*

commodification of the workload that she has to perform unpaid<sup>11</sup>. In particular, if the state organizes this workload and establishes kindergartens, pre-schools, care for the frail elderly and handicapped, women will be hired as labour force, and get a salary for what they performed for free (effectively redistributing the caring tasks). But my point is that what is happening here is not an expansion of the market (which does expand, but only indirectly with the use of the salary received): what is commonly called commodification of the labour force that works for the state, is not proper commodification because the logic in the state apparatus is redistribution, not profit (though profit support is a major motive of states' action). In this conceptual framework, the expansion of the welfare state (that draws its labour force mainly from women) does not mean the "commodification" of women's labour and tasks at all, even if the exchange they make as workers is labour power against money: this money comes from the state (primarily from taxes) and is not given with a profit motive. What we really talk about is the socializing of the costs of some services. In this case the exchange that women make as carers is free time obtained with services paid with money from taxes (commonly with a fee for users, too), but not necessarily with "commodifies" services, that is services offered to make a profit. Both these possibilities are indicated in the concept of "defamilialisation" by Ruth Lister, defined as: "The degree to which individual adults can uphold a socially acceptable standard of living, independently of family relationships, either through paid work or social security provision" (quoted in Kilkey and Bradshaw 1999, 154). That women, or rather women's work, need to be "commodified" to move on from their subordinate role as unpaid caregivers is a statement that I do not consider correct, even taking into account the general progressive role of market economy in regard to women's status.

A second theoretical point that I would like to make is a critic of the vulgate of Polanyi's categorization, in which the labour performed inside the family is considered to be offered on a reciprocity basis. What can be observed in reality is an exploitation of the female workforce (wife, but in more traditional families also female children) in favour of the male (husband and children), an exploitation that is normally experienced by the women as gratifying because it fulfils their socially expected role: education usually moulds females into this role as unpaid caregiver and society rewards them psychologically. The intergenerational exchange, too, can be a one-way conferring of goods and services by the older generation to the younger, more than a true reciprocal relation: this is what probably happens in the about 10% of the families with a elderly member who earns more than the others, as emerges from an international comparison by Pollastri (1996)<sup>12</sup>. A

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<sup>11</sup> For a deeper reflection on what commodification of care can mean see Ungerson (1997).

<sup>12</sup> Nevertheless Pollastri shows that within families in Italy the recipients are mainly elderly more than 75 years old and young people between 15 and 35 years old. Compared to Western Germany, in Italy not only workers but also pensioners have quite a strong redistributive role, with a high percentage of subjects who receive from them.

more reciprocal exchange is normally what happens within friendship's and neighbourhood's networks, where the relations are usually truly on a peer level. It is therefore confusing to name all the exchange that is not organized by the state nor happens in a market as "reciprocal", when in fact only little of it is really so – Polanyi's real analysis, with four categories: three modes of exchange among social units and one mode of exploitation of subordinate labour force rewarded with subsistence in kind, should be resumed in its entirety.

A note on the definition of exploitation: this is no easy task. My persuasion is that exploitation can happen not only in the profit sector, but also in activities collectively organized (redistribution) or in non-market private exchanges (reciprocity mode of exchange), and as already said within families, too. It is not possible to give an exact definition; exploitation seems to me a matter of degree, attestable measuring what is given and what is received in exchange, and by judging the resulting proportions. And what happens in the exchange is not even measurable in strict terms: the working conditions matter a lot, as the presence of disparity in the quality of living in society as a whole.

Let us now look in detail to what is commodified, what is distributed and what is exchanged on a base of reciprocity or extracted as free labour in a householding economical model in the care for the frail elderly in our three countries.

## Indicators in comparison

We will start with some opinions about the elderly and the welfare state. Eurobarometers in 1992 and 1999 have investigated what the Europeans of the Union think of public/private/familial care for the elderly, whether expenses should be socialized (“redistribution” mode of exchange) and who should be responsible to take decisions.

<i>Who Should Mainly Pay for the Care of Older Parents?</i>	<b>Older people themselves</b>	<b>Children</b>	<b>State/Community</b>	<b>Everyone equally</b>	<b>Other/Don't know</b>
Denmark	5.4	2.0	87.8	1.8	3.0
Germany	19.0	11.0	46.4	18.1	5.3
Italy	11.9	23.5	41.5	16.4	6.7
EU 15	14.0	17.1	47.7	14.7	6.4

<i>Who Should be Mainly Responsible for the Care of Dependent Older People?</i>	<b>Local/national government</b>	<b>Private companies</b>	<b>Associations</b>	<b>Don't know</b>
Denmark	86.6	10.2	1.8	1.4
Germany	53.1	11.4	29.4	6.1
Italy	63.4	11.1	18.6	6.9
EU 15	72.4	7.2	14.3	6.2

<i>The Best Person to Decide on Appropriate Services for Older People Needing LTC</i>	<b>Relative or close friend</b>		<b>Older person</b>		<b>Service provider</b>		<b>Another professional (doctor)</b>		<b>Don't know</b>	
	<b>1992</b>	<b>1999</b>	<b>1992</b>	<b>1999</b>	<b>1992</b>	<b>1999</b>	<b>1992</b>	<b>1999</b>	<b>1992</b>	<b>1999</b>
Denmark	24.8	29.7	48.1	44.4	9.0	12.5	17.0	11.4	1.0	1.9
Germany	20.0	23.9	45.4	48.1	3.7	5.2	28.5	20.0	2.3	2.8
Italy	30.9	37.8	18.2	20.9	7.5	6.6	42.2	32.8	1.2	1.9
EU 12 (1992)	28.4	31.2	33.5	37.8	5.6	5.3	29.7	23.1	2.9	2.5
EU 15 (1999)										

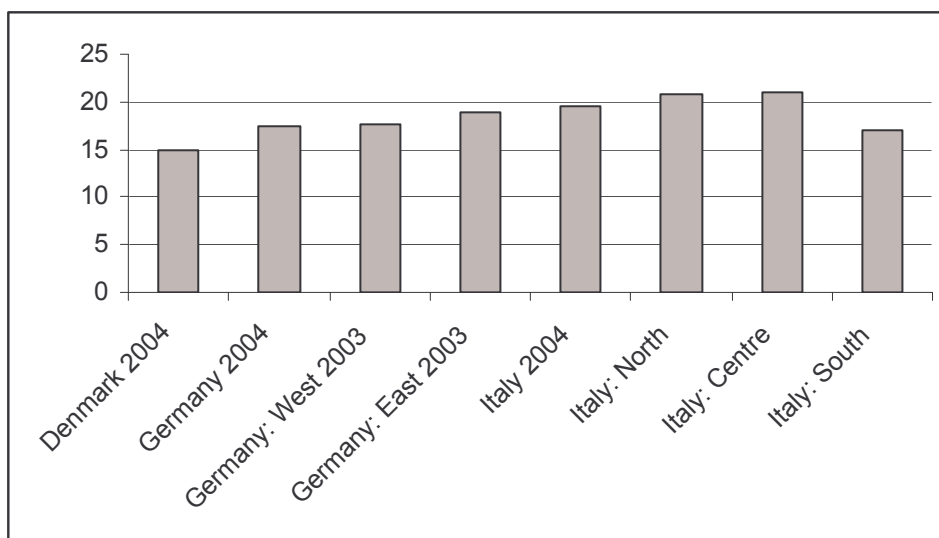
*Eurobarometer 1999: opinions about elderly care (percentage)*

*Source: Walker 1999; 31, 33, 36-37*

The results show a big support to the “European” model of socializing expenses and pooling risk, and a progressive acceptance of the centrality of the person in care. The countries’ analysis shows

indeed a more similar stance of Italians and Germans: the role of the state, of the local governments or communities is the most frequent answer in all three cases, but Danes are convinced of it in a much bigger percentage. Germany and Italy differ in the importance given to the individual versus the family: the prevailing proportions for these two categories in the first question are inverted, Italians are more family-centric and Germans more individualistic. Trust in professionals to decide on appropriate services has collapsed over time, but curiously in Denmark in 1999 people have answered less in favour of the older person him/herself and more in favour of relatives or friends, and even service providers.

Now let us look at some structural indicators: first of all the composition of the population and of the workforce.



Denmark 2004	14,9
Germany 2004	17,5
Germany: West 2003	17,7
Germany: East 2003	19
Italy 2004	19,5
Italy: North	20,7
Italy: Centre	21,0
Italy: South	17,1

*Percentage of population older than 64 years*

*Sources: Danmark Statistik, Istat, Statistisches Bundesamt Deutschland*

	<b>1994</b>	<b>2004</b>
<i>Denmark</i>	11.5	10.9
<i>Germany</i>	11.2	13.8
<i>Italy</i>	12.3	14.4

*Proportion of population aged 65-79 years - Source: Eurostat*

	<b>1994</b>	<b>2004</b>
<i>Denmark</i>	3,9	4,0
<i>Germany</i>	4,0	4,2
<i>Italy</i>	3,8	4,8

*Proportion of population aged 80 years and more - Source: Eurostat*

Italy is the country where the proportion of the aged is bigger – though in the South it is less than in Germany – followed by Germany. This measure is connected to the fertility rates: among these countries Italy has the lowest (though not the lowest in the E.U.) rate: 1,33 per woman in 2004 (Eurostat). Germany comes quite close: 1,37, with 1,4 in the West and 1,2 in the East, while Denmark’s rate is higher: 1,78. This difference could translate in more time usable to care for the frail elderly within the families, since children are less. Divorce rate is also lowest in Italy, by a factor of 4 in relation to Denmark and of 3 in relation to Germany, a fact that indicates that families have more internal resources, too.

In Italy mean family size is 2,5, but in the North it is 2,3 and 2,8 in the South (islands excluded). The “long family” is a peculiar Italian phenomenon, and it is reflected in these data, that are higher than the other two countries: average family size in Denmark is 2,2 persons, in Germany 2,12: the more individualist country, according to the opinion surveys, is not the one with the smaller mean family size. “Long family” is an expression related to the Italian youth’s inclination to keep living with the parents for much longer than the other European countries’, but also the elderly are living more with their children. A table with data from the European Household Panel shows the different percentage of elderly people living on one’s own or in couple in recent time. In all three cases, it is the striking majority, with the usual rank of Italy as the more “familistic” country, with a difference of 20-30 percentage points with the other two countries, that are less distanced from one another.

	<b>Over 80</b>	<b>Over 70</b>
<i>Denmark</i>	98	97
<i>Germany</i>	-	87
<i>Italy</i>	66	67

*Percent of elderly who live alone or in a couple (2001)*

*Source: European Household Panel, published in Pesaresi and Gori (2005, 58)*

Employment rates show quite a different situation in the three countries: female employment is growing in all of them, though it differs notably. The distances among the countries are diminishing, but not very much. While Italy and Germany have almost the same employment rate for males, Denmark has about 10% more. The only diminishing indicator is male employment in Germany.

	<b>Female 1994</b>	<b>Female 2004</b>	<b>Male 1994</b>	<b>Male 2004</b>
<i>Denmark</i>	66,9	71,6	77,5	79,7
<i>Germany</i>	55,1	59,2	74,1	70,8
<i>Italy</i>	35,4	45,2	67,7	70,1

*Employment rates<sup>13</sup> (15-64) - Source: Eurostat*

	<b>Female 1994</b>	<b>Female 2004</b>	<b>Male 1994</b>	<b>Male 2004</b>
<i>Denmark</i>	8,5	5,6	7,1	5,1
<i>Germany</i>	11,4	10,5	5,9	8,7
<i>Italy</i>	14,6	10,5	8,3	6,4

*Unemployment rates<sup>14</sup> (15-74) - Source: Eurostat*

Danish levels of male and female unemployment are nearly the same and converging, while German and Italian male unemployment rates are notably less than female. Here, too, distances are diminishing. In these states therefore the level of female participation to the workforce is very different. Taking into account the magnitude of the informal sector in Italy – estimated at more than 20% of the GDP, while for Denmark the estimate is around 5% and for Germany again somewhere in the middle (European Commission 1998, 5) – this low activity rate for females can be corrected upwards, but still without reaching the other countries.

The German Mikrozensus (2004) sees a reduction in the activity rate of men and women: in Western Germany working women are 44,4%, less than but close to the Eastern percentage: 46,7%. These most recent data show also that now unemployment has grown to 8,5% in the Western part and 18,4% in the Eastern. According to data for 2000, in Eastern Germany, the maternal labour market participation rate (about 70%) is much higher than in the West (51%). This can be related to a more developed network of public childcare: in 1998, 36% of all children under three were in childcare, compared with 3% in the West (Bundesregierung, 2001). In Denmark this rate is over 60%: public child care centres are provided more extensively here than in any other European

<sup>13</sup> In the Eurostat measures equals the proportion of people who have worked for money for at least one hour during the reference week, or that hold a job from which they were temporarily absent.

<sup>14</sup> The unemployment rate is measured by Eurostat as a percentage of the labour force, that is the population employed and unemployed that has actively looked for a job in the four weeks' period, before the reference week and including it.

country. In Italy in 2003 only 8.5% of children under three are in public (municipal) care: 13,6% in the North-East and 2,4% in the South.

We have gathered some data on the welfare state in terms of expenditures, too<sup>15</sup>. The three countries are again on a well defined ladder with nearly equal distances: 10204,5 euro is the Danish expenditure, 7787,6 the German and 5749,3 the Italian (Eurostat 2002). These data become less distant but equally ordered if we look at PPS<sup>16</sup>: 8095,4 euro for Denmark, 7291,7 for Germany and 6266,3 for Italy.

The breakdown of this amount for the different kind of expenditures is reported in this table.

	<b>Social protection benefits</b>	<b>Sickness/health care</b>	<b>Disability</b>	<b>Old age</b>	<b>Survivors</b>	<b>Family/Children</b>	<b>Unemployment</b>	<b>Housing</b>	<b>Social exclusion</b>
<i>Denmark</i>	7862	1644	1012	2960	3	1050	726	182	286
<i>Germany</i>	7029	1990	541	2872	109	750	595	52	121
<i>Italy</i>	6030	1573	370	3104	628	237	105	3	10

*Social benefits per head of population by function in 2002 (PPS) - Source: Eurostat*

If we translate this into percentages, we will find that Italy gives more than half of its expenses to old age pensioners, but this corresponds to a bigger proportion of the elderly than the one found in the other countries (not to go any deeper in a very lively debate about public expenditure for pensions in Italy). Its relative spending is bigger for survivors (also an expression of the male breadwinner model) and decisively negligible for housing and social exclusion. Denmark and Germany are quite similar in their choice of public spending.

	<b>Social protection benefits</b>	<b>Sickness/health care</b>	<b>Disability</b>	<b>Old age</b>	<b>Survivors</b>	<b>Family/Children</b>	<b>Unemployment</b>	<b>Housing</b>	<b>Social exclusion</b>
<i>Denmark</i>	100	20.9	12.9	37.6	0.04	13,4	9.2	2.3	3.6
<i>Germany</i>	100	28.3	4.8	40.9	1.5	10.7	8.5	0.7	1.7
<i>Italy</i>	100	26.1	6.1	51.5	10.4	3.9	1,7	0.05	0,17

*Social benefits per head of population in 2002 (percentage) - Source: Eurostat*

	<b>Social protection benefits</b>	<b>Sickness/health care</b>	<b>Disability</b>	<b>Old age</b>	<b>Survivors</b>	<b>Family/Children</b>	<b>Unemployment</b>	<b>Housing</b>	<b>Social exclusion</b>
<i>Denmark</i>	111.8	23.4	14.4	42.1	0.04	14.9	10.3	2.6	4.1
<i>Germany</i>	100	28.3	4.8	40.9	1.5	10.7	8.5	0.7	1.7
<i>Italy</i>	85.8	22.4	5.3	44.2	8.9	3.4	1.5	0.04	0.14

*Social benefits per head of population in 2002 (percentage, Germany =100) - Source: Eurostat*

<sup>15</sup> Total expenditure on social protection per head of population contains: social benefits, which consist of transfers, in cash or in kind, to households and individuals to relieve them of the burden of a defined set of risks or needs; administration costs, which represent the costs charged to the scheme for its management and administration; other expenditure, which consist of miscellaneous expenditure by social protection schemes (payment of property income and other).

<sup>16</sup> Purchasing power standards, with measures standardized around the E. U. mean.



It has been repeatedly stressed that these measure of expenditure are not entirely reliable to rank countries because the fiscal system might give advantages that are also a part of the welfare system, so we must keep this in mind. It is very complicated to create synthetic measures that include provisions other than expenses, because they are conferred by a multiplicity of different public authorities (so we will not attempt to do it).

What are the institutional responses to the growing need for elderly care because of population aging in the three states? First we will trace a picture of institutional elderly care, women’s burden, and the labour market to assist elderly people, then we’ll reach our conclusions.

Starting point can be these data gathered by Esping-Andersen, to confront them with the data newly gathered about the most recent period.

	% of elderly over 65 in institutional care (1985-91)	% of elderly over 65 receiving home help (1985-92)	% of elderly living with children (around 1985)	Young unemployed living with parents in % of the total (1991-93)	Women’s unpaid weekly working hours (1985-1990)
Denmark	6	20	4	8	24,6
Germany	6	3	14	11	35,0
Italy	2	1	39	81	45,4

*Welfare responsibility on families*

Source: Esping-Andersen (2000, 112), Anttonen and Sipilä (1996, 92) (OECD data)

This table shows a very clear picture of women’s work for the family: Italians worked more, nearly double as much as Danes. There were bigger families with more people in need in Italy, followed at a long distance by Germany. In German and Danish families the presence of the elderly was at a much lower level than in Italy. We can already notice that the presence of the elderly in families is now not much different, declining only slightly (see table at the bottom of page 14). And in Germany and Denmark the proportion of the elderly both receiving home help and living in institutions was bigger: professionalization and socialization of care work was already much more advanced.

**Institutional elderly care**

Residential care is not spread at all in the three countries: there are explicit policy objectives to help the elderly to stay at home as long as possible<sup>17</sup>. In Italy the percentage of men and women over 60

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<sup>17</sup> The agreement of the population is strong: “The vast majority of the general public (four out of five and nine out of ten of those that express an opinion thought that older people should be helped to remain in their own homes. The only

years old living in old people's homes in 1991 (census year) was 120.000, that is 2,1% of this age class, more concentrated in the North (Bonarini 2002). About 40% are people who never married. Married men have a minor chance than married women to be living in old people's homes, while separated and divorced men have a higher chance than separated and divorced women. In 1999 according to Istat the absolute number of people more than 65 years old in residential care (35% of which is public) was 221.342, but still 2% of the corresponding age class, while according to data from the Ministry of Health in 2002 there were 172.000 elderly in residential care, therefore less than 2% of people more than 65 years old. The North has still the biggest concentration: nearly three times more elderly are in institutional care than in both the Centre and the South, while the share of the Northern population is 45%.

In Denmark the number of old people's homes has been shrinking since 1988, when the government decided to change the policy substituting the institutions with apartments especially designed for the life of people in need of different forms of help. The administration of the institutions must refer to a Council of the Elderly elected in every municipality, in charge of controlling living conditions: everyone above 60 years old can be eligible and votes. In Germany there is a similar organ at the level of the single institute (we'll talk about it later). In Italy there are no such organs, and scandals of discovery of terrible living conditions in private institutions periodically appear in the press.

Danish municipalities have the duty to give special housing to dependent people over 67 years old, if they require it after hospitalization. If the municipalities are not able to do it, they must pay a fine to the province (Commission des affaires sociales 1997/1998). Only 5224 Danes are living in institutions and receiving help; in 1997 the quota of people at least 67 years old was about 5%, that is a slowly declining portion. The explicit principle of keeping the person in his or her home, resorting to nursing homes only for very dependent people, brought to the establishment of day care centres. This public care system is financed by general revenues (as for the whole health service) for 80% of its value. Home helping, together with special housing, is the most important Danish policy for the frail elderly. The law on public care of 1987 stated that home help was to be given for free independently of the financial situation or of the presence of family. A survey of recipients of home help in 6 Danish municipalities has showed positive judgments by 4 out of 5 recipients, while only one in twenty reports negative experiences. The number of hours should be increased, according to the interviewees, and the number of carers reduced (*6-kommunerapport* 2004).

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countries where in more than one-fifth chose the residential care option were Denmark and Portugal", both 27 per cent in 1992. In 1999 the Danish percentage fell to 23% (Walker 1999, 27). In Denmark the principle of helping somebody to help him/herself, and not having the home helper to substitute the old person was recently confirmed by law on social service of 1998, but research shows that it is difficult for home helpers to comply, since for them it is must faster to do everything by themselves (Swane 2004).

In Germany the number of the elderly at least 65 years old living in institutions was 570.000 in 1999, 5% of all the elderly, therefore it is slowly declining, too.

What is decisively growing in all countries is the proportion of the elderly receiving home help. Data gathered by Pesaresi and Gori (2003) about people over 65 years old show that Danish percentage has risen to 24,6% in 2000, German to 9,6% in 1996, while their estimate of the Italian share in 1999 is 3%<sup>18</sup>: this – still very low – number represents the elderly reached by home assistance organized by municipalities. If we include other kinds of assistance we find that in 2003, 24,4% of the Italian families with elderly people have received some form of public help (cash included), while 20% have recourse only to private help and 18,4% to informal networks, that are more diffuse in the South (Istat 2005, 292).

In Italy the chosen policy is conferring financial assistance: the “assegno di accompagnamento” (accompany check) for invalids (law 18/1980) and most recently the “assegno di cura” (care check) for people in need of care, introduced by the law 328/2000, means tested. The first pays a maximum of 400 euro to totally invalid persons (no means testing: it is the only financial assistance of this kind in Italy); 860.000 persons, more concentrated in the South, receive this financial help, and more than 70% are elderly, that is 6% of the people older than 65 years receive it. Services in kind and proximity assistance have been introduced only in the last 20 years. Before, the only recourse to the public sector that was possible was institutionalization.

To avoid recourse to residential services, local care check have been introduced (they are means tested and needs tested). The local care check for the elderly is meant as a way to ease the growing need with cash instead of care. From 1995 on it has been given out more in the Centre and the North (64% of municipalities in a recent poll) than in the South (12%). Vouchers are given out in around 12% of municipalities, as an experimental form to “buy” services from private or public providers (Gori and Torri 2001). In sum, the frail elderly in Italy are left to the family and the market, with almost no socialization of the risks of the old age<sup>19</sup>. Around the half of formal home services are private, and the majority of residential care is given by private no profit sector, where fees are nonetheless very high (Pesaresi and Gori 2003). The “assegno di cura” is a high incentive to black work (Gori 2001, 28). The informal market for care has unknown, though big and in the last years growing, dimensions, because of the peculiar Italian phenomenon of the “badanti”, immigrant (predominantly) live-in caregivers – we will talk about them later.

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<sup>18</sup> Data from the Ministry of Health point at 2,5% of this part of the population in 2002, but it does not include help provided by municipalities (Censis 2004, 286).

<sup>19</sup> Italian pensionists’ trade unions are advocating for the creation of a “National fund for not self-sufficient elderly”, promised with the law 328/2000 and with the financial law for 2001.

The typical German way for organizing care for the elderly is a compulsory insurance, that also translates in cash benefits, since they are normally preferred to the help in kind. In Germany elderly care was underdeveloped both in the East and in the West, until ten years ago a long-term care insurance was introduced, a measure called upon by the local authorities, whose resources were drained by the growing need of care of the elderly (Pavolini, 2001; BMGS 2004). Resources for people in need of care tripled, though in the current accounts there is now a small deficit (4%). The *Pflegeversicherung* has been introduced in 1995, financed with contributions from workers and employer – each pays 0.85% of the gross payroll (plus 0.25 if they have no kids and are born after 1940)<sup>20</sup> – and benefits the worker and his/her family. The beneficiaries at the end of 2003 were a total of nearly two millions (1.893.181) plus approximately 100.000 privately insured individuals. The two millions are divided between two thirds (1.279.000) receiving home help (one tenth from the public sector) and one third (612.000) receiving help in institutions. In 2000 the share of beneficiaries among elderly over 65 years old was 10,4%.

Besides the frail elderly, the beneficiaries are people in a situation in which they need care for at least six months: handicap, mental illness, consequences of accidents. The amount given, depending on three degrees of need of care, is not means-tested, and can either be received as in-kind benefits or cash benefits (or a combination of the two), that can be devolved to a member of the family or a friend who cares for the disabled person. People taking care of others are socially insured with contributions for pension and accident insurance, are trained, and can enjoy 4 weeks of vacancy, while the person cared for is taken in a rest home. The purpose of *Pflegeversicherung* is to fulfil a collective obligation of taking care of people in need<sup>21</sup>, and to help in keeping the person in need of long-term care at his/her home.

The money equivalent of services furnished by personnel of the social services is lower (665 euro cash instead of 1432 euro for services, that can be raised to 1918 euro for severe cases), but half of the beneficiaries nevertheless prefer this form, while 10% chooses a combination of the two forms, only 8,6% take only home help services and 30,5% transfers the sum to the institution where they live. At the beginning of 2000 the number of (former informal) carer insured was 500.000. Authorized institutions are 10.600 surgeries and 9165 nursing homes, plus 1428 institutions for short term assistance (in 2001); the share of the public sector is about 10% (relatively to this form, a share minor than the Italian of 35%). The old people's homes are governed by a board where also

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<sup>20</sup> So the total contributions amount to 1,7 of the gross salary, with an upper roof. Also pensioners must contribute, and there is a possibility of opting out for high income people, who must choose a private insurance.

<sup>21</sup> “Die Fürsorge für pflegebedürftige Menschen gehört zu den sozialen Aufgaben unserer staatlichen Gemeinschaft (Artikel 20 Abs. 1, Artikel 28 Abs. 1 S. 1 GG)“. Socializing does not happen in the concrete way of responding to needs but in the way of organizing it.

the residents have their representatives (third persons can be elected, like members of their family), and there are often quality controls by public authorities, established by law.

The assessment of the effects of such a measure are not all rosy: 97 % of registered Informal Carers are women. The following table shows the family relationship with the cared person.

partner	28%
child	22%
daughter-in-law	7%
sibling	2%
other relatives	4%
friend	3%

*Registered caregivers in Germany*

*Source: Jenson and Jacobzone 2000, 44<sup>22</sup>.*

The situation of the caregivers is certainly improved, because they would have given care because of its need, and not of financial incentives, and they would have given it without being socially insured nor taking advantage of the “holiday period”. But this mechanism tends to stop any possible evolution, nailing women down to do care work. This is what Jenson and Jacobzone write in an evaluation of the Ocse countries:

“In order to understand whether these care allowances reinforce or limit existing gender inequalities, three questions will be addressed for each public subsidy or benefit.

- Does the care benefit lead to increased incentives for women to substitute informal caring work for paid employment?
- Does the care benefit provide sufficient compensation for the economic consequences of performing informal caring work and reducing labour market participation? In particular, is the benefit short-term (an immediate monetary exchange), or long-term (by providing access to pension and other social rights)?
- Does the care benefit alter the structure of the formal labour market for care work?

The main conclusions are that public subsidies for home care do not appear to be a tool enhancing greater gender equality. Decisions about payments for care have been made in response to desires to alter the relationships among the four sides of the welfare diamond: state, market, voluntary sector and family. They do not seem however to have either increased the resources for informal care-giving or to have influenced participation in labour markets” (Jenson and Jacobzone 2000, 9-10).

## **Women’s burden**

In two of the countries women’s unpaid working hours have diminished: in Italy from 6:30 to (still) more than 6 hours<sup>23</sup>, in Germany from 5 hours a day to 4:11 as maximum (confront the table on

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<sup>22</sup> Presumably quoted from Ostner I. (1998): *Paying for Care: Repercussions for Women Who Care, the case of Germany*, Georg-August-Universität, Institut für Sozialpolitik, Gottingen, Germany.

<sup>23</sup> Men’s burden has grown, but not in the same measure as women’s diminution: from 1:20 in 1988-9 to 1:38 in 2002-3, while the time spent by women on housework has diminished from 6:57 to 6:22 (Istat 2005, 260).

p.16 with the following tables, though the ages are not the same, so the reduction is not precise). In Denmark on the other hand women's housework burden has grown by half an hour a day, 3:30 hours more every week, though it stays at the minimum level, because housework is performed more by Danish men (their burden has grown, too from 1987 to 2001).

In Italy data on time use (1988 and 2002) show a tendency to reduction of domestic work for women and a slightly more balanced distribution between the heterosexual couple. The biggest burden is still the presence of children, though the husband in these cases reveals himself to be not a relief but an aggravating circumstance: "The analysis of the workloads of single mothers confirms what already emerged in 1988-89: the absence of a partner lifts women of a non negligible part of the family workload (in mean nearly two hours less than women in couple with children). In other terms, even when the situation is the same regarding the number of children and the occupational condition, women in couple dedicate more time to housework" (Istat 2005, 262)<sup>24</sup>. Seventy-seven per cent of the housework is still performed by women, though 14 years before it was 85%. When the woman works, the percentage of the partition of domestic work shows only a small difference: for women 25-44 years old living in couple, paid work absorbs 6 hours and a half, about two hours less than employed men, while domestic work absorbs 5 hours, instead of 2 performed by men, with 2 and a half hours of spare time, while men have one hour more. The time dedicated to paid work and transportation to and from the working place are growing, while spare time diminishes by half an hour a day for both sexes<sup>25</sup>. In the North the division of housework is more equal than in the other areas.

	Women in couple total	Housewives in couple	Employed women in couple	Men in couple total
Free time	2:31	2:47	2:17	3:18
Meals, personal care, sleep	11:14	11:32	10:59	11:12
Work	2:24	0:02	4:15	6:04
Travel	1:19	1:11	1:24	1:38
Domestic work	6:22	8:18	4:57	1:38
Other	0:10	0:10	0:08	0:09

*Time use in Italy 2002-2003, women's age 25-44 - Source: Istat 2005, 260*

<sup>24</sup> A proper report on the most recent time use survey (2002) is still not available.

<sup>25</sup> Working time for women is growing of just 10 minutes per day, while transport time of 40 minutes, doubling itself. For men working time stays the same (just one minute more) and transportation time grows by 23 minutes.

	Women	Employed women	Men	Employed men
Free time	5:24	4:49	5:53	5:11
Meals, personal care, sleep	11:02	10:42	10:45	10:21
Work and study	2:05	3:52	3:35	5:05
Travel	1:18	1:27	1:27	1:31
Domestic work	4:11	3:11	2:21	1:52

*Time use in Germany 2001-2002, age 20-74 - Source: Eurostat*

	Women	Employed women	Men	Employed men
Free time	5:40	5:04	5:57	5:16
Meals, personal care, sleep	10:54	10:34	10:31	10:13
Work and study	3:35	4:45	5:02	5:58
Domestic work	3:30	3:34	2:26	2:30

*Time use in Denmark 2001, age 16-74 - Source: Bonke 2002, 260*

In Denmark, as in Italy, working time (comprised of study) has grown from 4 to 4:30 hours a day from 1987 to 2001. Housework has grown of half an hour, too, with a total of nearly 3 hours per day. There is no significant difference in the time spent either on housework or paid work plus study between the two sexes. Men use 5 hours for paid work plus study and 2½ hours for housework, while women spend 4 hours at work or studying and 3½ hours for housework. The difference in housework for the two sexes has become less than in 1987, when men used 1¾ hours and women 3. Women are doing far less part-time work and have shifted to full time work.

In Germany women have half an hour less free time than men, that for working women and working men reduces to about 20 minutes of difference. Domestic work is performed by women for nearly two hours more than men, and for employed men and women the difference is reduced to one hour and twenty minutes.

Unfortunately the most recent data on time use are not at the public disposal, so we cannot look in detail at what part of the unpaid work is dedicated to care for the elderly. Moreover, the differences in age make the following tables about time use in our three countries, elaborated from the publications quoted, totally impossible to comparable.

### **Labour market for elderly assistance**

We have come to the final question of the commodification of care. Comparable microdata on families' recourse to hired caregivers would have given the best picture, though a certain underrappresentation is to be expected, due to black work, especially where it is more diffuse. Only

for Italy we have useful data at the family level<sup>26</sup>: the Istat “Multiscopo” survey, asking questions about care received from different sources. In Italy informal care to families composed by at least one person older than 65 years has diminished in time: in 2003, 18,3% of these families have received help from members of the family or of friends’ and neighbours’ network, against 28,9% in 1983 (Istat 2005, 287)<sup>27</sup>. What has also changed in the same lapse of time is the recourse to paid domestic work<sup>28</sup>. The survey found that 9,7% of the families with an elderly member receive private help to mind the house and/or the person. In 2000 the quota that employed someone just to care for the elderly was 4,2% (317.000 families)<sup>29</sup> (Istat 2001, 251). Families with at least one person at least 65 years old that receive informal help are 18,3%, those who receive (also) private help 10%, (also) public help 6,8%, with a total of families that receive at least one form of help of 27,7% (Istat 2004, 291). The association «Viva gli anziani» polled 5.398 elderly at least 65 years old in seven cities, and found that 13,3% of them had hired foreign caregivers (Sarti 2004b); the Istat data show that the recourse to hired workers is more diffuse in cities, too. The Istat “Multiscopo” survey also found that persons whose mother is older than 65 and not living with them, declared to have someone living with their mother in order to care for her only in 4,3% of the cases, and only 2,5% had someone living with their fathers. Distance in the places of residence is not the only motive: only 21% live more than 50 km away from the assisted mother, against 15,6% of the interviewees whose mother is not assisted.

	1996	1997	1998	1999	2000	2001
Colf	7.4	7.6	6.9	6.8	6.9	7.2
Babysitter	1	1.1	1.7	1.4	0.9	1.2
Caregiver	1.8	2.2	2	1.8	1.5 <sup>a</sup>	2.1
One service at least	9.2	9.2	8.7	8.4	8.8	8.8

*Italian families resorting to domestics (percentage)*

Sources: Istat, *Indagini multiscopo sulle famiglie, 1996-2001* (quoted in Sarti 2004b, 20).

Notes: a: 7,4% among families with at least an elderly more than 74 years old.

In the three states, occupation rates for 15-64 years old in social and personal services (unfortunately the data cover both the private and the public sector) are lead by Denmark with 26,2%, followed by Germany with 21,2% and Italy in the back with 13,5% (Lucchetti, Soggi and

<sup>26</sup> See note 1.

<sup>27</sup> And 2,5% have received help only from municipalities and public institutions, against 1,9% in 1998.

<sup>28</sup> Statistics by Istat (2005, 292) show the same percentage, 10,5 and 10%, resorting to private help in 1998 and 2003, but there was no question about the amount of work required.

<sup>29</sup> Babysitters are hired by 1-2% of the families (Istat 2004, 291).



Lamura 2002, 99, source: European Commission). If we look at official numbers, foreign workers in Denmark are not overrepresented in this kind of work, even though there is an overrepresentation of men: their percentage is smaller and does not compensate for the underrepresentation of foreign women and women of foreign descent. They are especially employed in social service.

	Immigrants and their children <sup>30</sup> from non Western countries		Danes	
	Men	Women	Men	Women
Health services	2	6	2	10
Social work	4	16	2	22

*Percentage of employees, 1.1.2003*

*Source: Pedersen 2004, 194*

In Denmark there is no special presence of foreigners in home assistance or nursing home assistance, that, as we have explained before, is an almost exclusive public competence<sup>31</sup>: the employees by Copenhagen commune are respectively about 7% and 2% while the percentage of inhabitants with a non Western background is 19%. Only in cleaning work there is a clear preponderance of foreigners: just above 25% both in the public and private sector (though this percentage is not very high compared to Italy, as we shall see in a moment).

In Italy domestic work in general is more and more performed by foreigners. In 1999 regularized immigrant workers were 249.000, and Inps estimated them to amount only to 27,7% of the total immigrant workers.

	1992	1993	1994	1995	1996	1997	1998	1999	2000
Total	31,629	23,088	22,474	24,246	16,619	20,739	27,203	36,454	31,629
Domestic work	21,828	14,555	12,420	10,712	2,591	4,816	6,183	6,795	21,828
% domestic work	69	63	55.3	44.2	15.6	23.2	22.7	18.6	69

*Authorizations to entry in Italy to work*

*Source: Commissione per le politiche di integrazione degli immigrati (2000) (quoted in Sarti 2004b, 25)*

<sup>30</sup> Danish statistics group persons born in non Western countries together with Danish citizens with both parents born abroad in non Western countries. This is the group called "foreigners".

<sup>31</sup> And supposedly will stay so: "Resistances to the introduction of market elements are quite spread among nearly all interested subjects: they are diffuse among public operators, fearing a negative effect on their working conditions, they are diffuse among municipalities that fear a reduction of their control power, they are diffuse also among users, fearing about the quality of the service" (Pesaresi and Gori 2003, 463).

Then in 2003 a “sanatoria” (regularization campaign for people already working in Italy<sup>32</sup>) was launched, for only three categories of foreign workers: employees, domestics and “badanti”, that is caregivers for the elderly, a word especially re-invented for the occasion. The amount of applications was surprising: 140.000 “badanti” asked to be given a work permit, 190.000 domestics, altogether almost half of all the applications (702.000). Nearly half of the domestic workers and caregivers came either from Ukraine or from Rumania. At the end of 2002 immigrant domestics were 56% of the total, with 39,9% coming from Asia, 28,2% from Europe, 18,6% from the Americas, 13,3% from Africa, with Eastern Europe in dramatic growth.

The total estimation of domestic workers that official Italian sources made in 2001 was 1 million and 50.000. Many foreigners have regularized their position with the *sanatoria* of 2003, as the following table shows, but still 50% of that estimate is missing to the call<sup>33</sup>.

	Total	Of which not E. U. citizens		
		% foreigners	Total foreigners	% foreign women
1994	190994	26,8	51110	72,7
1995	192212	30,7	59006	72,8
1996	237593	46,2	109795	69,1
1997	241407	47,2	114176	74,1
1998	208407	45,6	95184	75,7
1999	247450	51	126297	77,2
2000	256539	53,2	136619	78,8
2001	261425	54,4	142196	78,8
2002	224402	65,7	147328	81,8
2003 (estimate)	588701	83,3	490678	NA

*Domestic workers in Italy - Source: Inps 2004, 21*

Data about the regional distribution of domestic workers show surprisingly that immigrants are more concentrated (66%) in the Centre, then in the North (57%, which is close to the national mean), and scarcely in the South and the islands (37%) (Inps 2004). It is surprising because Northern Italian women work more often outside the home, and in the North the concentration of the elderly is bigger, but it is true that they are more often living in nursing homes.

In Germany and Denmark on the contrary there is no possibility for a migrant to obtain a working permit for domestic work<sup>34</sup>, but in Denmark from the 1<sup>st</sup> May 2004 the citizens of the 10 new E.U.

<sup>32</sup> This is the most common way for immigrants to obtain a stay permit in Italy (Ambrosini and Abbatecola 2004).

<sup>33</sup> In Denmark, fiscal policies have been adopted from 1998 to combat black domestic work: the State subsidizes to companies about 50% of the work cost of home help to families. In 1998-2000 about 4.000 companies have used the possibilities, providing services to 300.000 families, but the flip side is that the program does not foresee measures for individual work (Pesaresi and Gori 2003, 149-150).

<sup>34</sup> In fact – except for possible recent changes – the countries who foresee such permits in the E. U are more the exception than the rule: Italy, Spain, Great Britain, Cipro and the new E. U. states (Hess 2005).

countries can stay in the country up to six months in search of a job, and they can also establish their own business. Legal channels are open also through the *au pair* agreement of the Council of Europe in 1969, and in Germany and Denmark *au pair* girls are taking the place of domestics: accorded annual permits are growing and amount to 1500 in 2004 in Denmark and 27.376 in 1999 in Germany, of which 13.900 from outside Europe. The *au pairs* come in growing numbers from Eastern Europe and are frequently exploited by the families with which they should exchange board and lodging and pocket money for a limited amount of work, a limit that is generally not respected (Hess 2005). After the Danish press (*BT*) turned its attention to the exploitations of *au pairs* – 10 hours of daily work instead of 3-5, for 2500 DKR of pocket money – “exchanges” with the Philippines were stopped by the authorities. These young women nevertheless help out families with small children, and cannot work in a family without them, according to the rules set by the Council of Europe, so it is unlikely that they should be employed as caregivers for the elderly.

	Residence permits
Philippines	475
Ukraine	198
Litauen	113
Poland	94
Rumania	84
Russia	82
Bulgary	68
Letland	57
Thailand	23
Brasil	13
Total	1500

*Au pair in Denmark 2004*

Source: Udlændigestyrelsen (quoted in DR Nyheder on line, 16.5.2005).

Only in 2002 German authorities established to give out up to 100.000 working permits to Eastern Europeans caregivers of people in need, with a maximum extension of 3 years, but only 1300 permits were accorded before the program was stopped.

Illegal migration occurs in these two countries as well. The estimates for Germany are as high as the Italians: hundreds of thousands for Italy and 500.000 to one million for Germany (Blaschke and Scuteri 2004), though German official sources do not confirm these numbers nor give alternative estimates (Worbs 2005). In Germany women illegally present on the territory are often performing live-in domestic work. Sources indicate that this happens almost exclusively in Western Germany,

where there is more capability to hire this workforce, whose demand is judged to be high<sup>35</sup>. In 2001 in Frankfurt a police operation in private houses found 200 women, predominantly from Slovakia, who were illegally employed as caregivers (Hess 2005).

In Denmark the political turn to the right has roots in the preoccupation about immigration, even if the phenomenon of *sans papier* is less pronounced than in the other two countries.

The three countries show different patterns of legal migration, too. Germany and Denmark have both declining trends, corresponding to a growing number of undocumented persons, especially in the last ten years. Now the biggest part of legal migration in Germany involves “diaspora Germans” who have come back from Eastern Europe: more than 2 millions of people of German origin have established themselves in the country between 1990 and 2000 (from 1993 with annual quotas of 100.000). Denmark, instead, has a presence of people receiving asylum that accounts for one third of all foreigners but is now restricting this possibility – Germany has stopped it altogether, and Italy has a negligible number of seeker who are actually granted asylum. In terms of percentage of foreigners in the total population in 2004, Germany leads with 8,8%, while Denmark has 6,3% immigrants plus 1,9% people with Danish citizenship but foreign mother and father, for a total of 8,2% and Italy follows with just 2,6% of the population.

## Conclusions

All the three cases under scrutiny have witnessed a shift from the traditional family (male breadwinner, wife carer) towards a modified model, with women taking up paid work outside the home in crescent numbers, especially in the service sector.<sup>36</sup>

Care for the frail elderly, a task ideologically reserved to the women of the family, has been taken upon itself by the welfare state only in Denmark, while in Germany the state has settled the rules for sharing the risk among the population, and the majority of the beneficiaries has chosen simply to get the money and not the services. In Italy, where the main social policy instrument is still a (low and means-tested) check to the person in need of care, families provide care privately, or hire private helpers, very often immigrant women. Data on occupation and time use show an increasing use of women’s time in the labour market and transport, and diminution of housework does not compensate for this: spare time also diminishes, though Italian women’s activity rate stays at the bottom. Public organization of care does not arise automatically from the existence of an interest group: the elderly are a bigger proportion of the population in Italy, but the public just gives low

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<sup>35</sup> Cyrus, Norbert (2004): *Aufenthaltsrechtliche Illegalität in Deutschland. Sozialstrukturbildung - Wechselwirkung - Politische Optionen*. Bericht für den Sachverständigenrat für Zuwanderung und Integration. Oldenburg, quoted by Worbs (2005, 10).

<sup>36</sup> See Meyer (1994) for Germany.

cash transfers<sup>37</sup>. The Italian state has facilitated the further commodification of the care for the elderly by including in the “sanatoria” a special category of caregivers for the elderly. This commodification was made possible only by the low salaries paid to foreign women, who come from countries where the wage differentials make emigration worth it even with subminimal wages. Low wages and bad working conditions have even brought authors as Bridget Anderson (2000) to conclude that domestic work by immigrants should be ascribed to “householding” instead of considered as an opening up of a new “market”, since the conditions are slavery-like. Qualitative work, of the type undertaken by the research on the University of Bologna<sup>38</sup> is needed to assess it.

The German case hints at the fact that care needs tend to be satisfied individually with the labour force on offer at the lowest price<sup>39</sup>, unless their fulfilment is organized in a compulsory and socialized way: illegal migration (that is manpower completely subject to the employer, since it has no rights, nor even the one of staying in the country where it works) is difficult to control if it stays mainly within private houses to live and to work with no prescribed vacations and daily limits. Once this situation is established, it becomes difficult for the state to criminalize upper and middle classes, sending police to search for “illegal helpers” in private family houses (though this has happened in Germany and in sporadic cases in Italy). Where the need, as in Denmark, is already fulfilled in a social way, then obviously the demand for cheap labour disappears from the families, eventually shifting to the employers in elderly care services, who are either public, or private, but more easily subject to controls than families. Countries with strong controls as Denmark give less possibilities to the developing of a black market, in Germany the situation is intermediate, in Italy lack of controls (that are concentrated on the streets) translates in a “flood” of immigrant workers, who are illegal also because of the difficulties in using official immigration channels to work. And in turns the black market becomes then necessary to families to take care of their elderly: in the latest years Italy has registered a diminution of the hours dedicated to informal help to the elderly (Istat 2004, 286).

So the question if different levels of public welfare encourage the recourse to private hiring of care workers in the families can be answered positively (though data about Germany are admittedly scarce). No retreat from the “decommodification” associated with welfare states has been discovered: on the contrary public intervention seems growing – if anything else, because in Germany care has started to be considered as work to be socially insured, if not directly paid.

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<sup>37</sup> This conclusion matches the results of Huber and Stephens (2001) who put six theories to test with data about development of welfare states, discovering that path dependency is the only theory that data do not contradict.

<sup>38</sup> “Nationality, class and gender in the new domestic labour. Changes in the Italian families and evolution of migratory systems towards the country”.

<sup>39</sup> In Italy (and probably everywhere else, if the risk of being caught is negligible) it is still convenient to resort to illegal labour force, even if the cost of social contributions is exempted from taxes (Gori and De Roit 2002).

Finally, if we come back to Sainsbury's model, we see that the last two dimensions are the most pertinent to elderly care: the *sphere of care*, that is primarily private both in Germany and in Italy, while in Denmark there is strong state involvement, and the *paid component of caring work*, that this time divides Germany, where social security is guaranteed, from Italy, where the informal carer has no official role, apart from being mentioned in the "assegno di accompagnamento" (check to accompany), supposedly used by invalids to pay for the carer (in black).

Therefore our departure point of not choosing a dichotomy but rearranging Esping-Andersen's typology to compare Italy, Germany and Denmark has been underpinned by the illustration of how these different states, as examples of different welfare regimes, treat elderly people in need of care.

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