

DISCUSSION PAPER

CHILD-RELATED FINANCIAL TRANSFERS AND EARLY CHILDHOOD EDUCATION AND CARE:

A review of key developments,
impacts and influences in child-related
support to families



No. 3, July 2015

MARY DALY

FOR PROGRESS OF THE WORLD'S WOMEN 2015-2016

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SUMMARY

This review examines policies for the support of families with children, in particular child-related financial transfers and early childhood education and care (ECEC) services. The analysis is mainly focused on countries with institutionalized welfare states – primarily Western European and other Organisation for Economic Co-operation and Development (OECD) countries – because that is where child-related benefits and services have the longest history. Temporally, analysis is focused on the unfolding of the relevant transfers and services from the period of their inception in the early decades of the 20th century to the reforms that are currently underway.

There are clear trends to be seen. Among the most significant are: a gradual cutting back on child-related financial transfers in favour of ECEC services; a gradual shift towards more expenditure on younger children; more targeting of low-income families; and the use of child-related policy to make employment attractive to people and capable of offering them an adequate income. One must note, however, the strong regional variations, with different approaches preferred in different areas. In the European Union, a joint portfolio of cash transfer and services is still preferred (although with some significant changes); in other parts of the world (especially Latin America), there is a move to conditional cash transfers and an expansion of day-care programmes for children.

The review highlights a number of core insights relevant to policy planning and decision-making for child-related transfers and ECEC services. The first major point to note is that child-related policies serve a range of objectives and each policy type has specific goals. It also has to be recognized that each type has its strengths and weaknesses. Among the benefits of child-related financial transfers, for example, are their flexibility and the fact that they have a range of modalities. Services have the advantage of ensuring that access to the desired good is consumed and, when provided and/or resourced through public means, that this is available.

Child-related financial transfers and ECEC services should not be seen as alternatives to each other. Both

are needed – a cash and care approach seems ideal. Moreover, the aim should be continuous support across the life cycle. Research reports a better set of outcomes in countries where support is more comprehensive. One of the principal underlying points is that the effects of different measures depend on complementarity and that for the best outcomes measures need to be viewed holistically. The challenge is thus to design measures in a way that produces positive outcomes simultaneously.

Children's needs and well-being should be at the forefront when these policies are being designed and put in place. While this may appear self-evident, the fact that policies are intended to meet several objectives – plus 'blind spots' in policies – can result in a situation where children are not a central consideration in measures that are assumed to benefit them. Children's well-being and agency need to be to the fore.

There is no doubt that child-related transfers and services have a major impact for and on women and on gender inequality. Throughout their history and still today, benefits and services for children tread a fine line between giving women extra resources and confirming them in a domestic role (and thereby adding significantly to their responsibilities). Gender is often in the background when these policies are being designed. This review indicates the need for gender equality to be a frontline consideration in this (as in other) policy domains, as should the impact on women's and men's agency.

There are other lines of potential division associated with these transfers and services apart from gender. Some provisions run the risk of being regressive. This is especially the case with ECEC services, which in some countries tend to be most used by higher-income families. Measures, including targeting, are needed to increase take-up among low-income groups. An intersectional approach to inequalities – which recognizes the inter-connections between divisions and disadvantages associated with gender, age/generation, social class and ethnicity (among others) – would not only help to avoid undesirable trade-offs but also reduce instrumentalism and short-term thinking.

RÉSUMÉ

Cette analyse passe en revue les politiques d'appui aux familles ayant des enfants, notamment les transferts financiers liés à l'enfance et les services d'éducation préscolaire et de soins à la petite enfance (EPSPE). Elle porte principalement sur des pays dotés d'États-providence institutionnalisés, principalement en Europe occidentale et d'autres pays de l'Organisation de coopération et de développement économiques (OCDE), car ce sont les pays où les prestations et les services liés à l'enfance sont établis de plus longue date. Sur le plan historique, l'analyse se concentre sur le développement des transferts et services concernés depuis la période de leur création au cours des premières décennies du XX^{ème} siècle jusqu'aux réformes actuellement en cours.

Plusieurs tendances se dégagent clairement, notamment une réduction progressive des transferts financiers liés à l'enfance en faveur des services d'EPSPE ; une transition progressive vers un accroissement des dépenses en faveur des jeunes enfants ; un meilleur ciblage des familles à faible revenu ; et l'utilisation d'une politique en faveur de l'enfance pour rendre les emplois plus attractifs et plus rémunérateurs. Il convient toutefois de noter qu'il existe des différences importantes entre les régions, d'où la préférence de certaines approches dans différents domaines. Au sein de l'Union européenne, un programme conjoint de transferts monétaires et de services reste privilégié (malgré certains changements considérables) ; dans d'autres régions du monde (particulièrement en Amérique latine), on observe une transition vers des systèmes de transferts monétaires assortis de conditions et une expansion des programmes de garderie pour les enfants.

L'analyse met en lumière un certain nombre d'idées essentielles liées à la planification politique et la prise de décisions concernant les transferts liés à l'enfance et les services d'EPSPE. Le point principal à relever est que les politiques en faveur de l'enfance servent un certain nombre d'objectifs et que chaque type de politique a des objectifs spécifiques. Il convient

également de reconnaître que chaque type de politique comporte des avantages et des inconvénients. Parmi les avantages des transferts financiers liés à l'enfance, citons notamment leur souplesse et le fait qu'ils peuvent opérer de différentes manières. La force des services est qu'ils garantissent l'utilisation de l'accès au bien désiré, et lorsqu'il est fourni et/ou financé par l'État, sa disponibilité.

Les transferts financiers liés à l'enfance et les services d'EPSPE ne doivent pas être considérés comme s'excluant l'un l'autre. Tous deux sont nécessaires : une approche associant les transferts en espèces et les soins semble idéale. En outre, l'objectif doit être de fournir un soutien continu pendant tout le cycle de vie. La recherche indique que les pays qui offrent le soutien le plus complet obtiennent les meilleurs résultats. L'un des principaux points sous-jacents est que les effets des différentes mesures dépendent de leur complémentarité et que pour produire les meilleurs résultats, celles-ci doivent être examinées de manière holistique. Le défi est donc de concevoir des mesures de telle manière qu'elle produit des résultats positifs de manière simultanée.

Les besoins et le bien-être des enfants doivent figurer au rang des priorités dès la conception et la mise en œuvre de ces politiques. Même si cela semble aller de soi, le fait que les politiques soient conçues pour atteindre plusieurs objectifs, outre les lacunes existant dans les politiques, peut déboucher sur une situation dans laquelle les mesures censées bénéficier aux enfants perdent de vue leurs intérêts. Le bien-être des enfants et leurs intérêts doivent être au premier plan.

Il ne fait aucun doute que les transferts et les services liés à l'enfance ont une grande importance et un impact considérable sur les femmes et les inégalités de genre. Depuis qu'ils existent, jusqu'à ce jour, les prestations et les services destinés aux enfants s'emploient à trouver le juste milieu entre l'attribution de ressources supplémentaires aux femmes et leur maintien dans un rôle domestique qui multiplie leurs responsabilités). La

question du genre est souvent reléguée à l'arrière-plan lors de l'élaboration de ces politiques. Cet examen montre combien il est nécessaire que l'égalité de genre soit examinée en priorité dans ces domaines politiques, ainsi que dans d'autres, de même que l'impact de l'action des femmes et des hommes.

Il existe d'autres clivages possibles en lien avec ces transferts et services outre le genre. Certaines dispositions risquent de se révéler régressives. C'est particulièrement le cas avec les services d'EPSPE,

qui tendent à être majoritairement utilisés par des familles à revenu élevé dans certains pays. Des mesures telles que le ciblage sont nécessaires pour accroître l'utilisation de ces services par les groupes à faible revenu. Une approche multidimensionnelle des inégalités - reconnaissant les liens entre les divisions et les désavantages liés au genre, à l'âge/génération, à la classe sociale et à l'ethnicité (parmi d'autres facteurs) - ne contribuerait pas seulement à éviter des conséquences indésirables, mais réduirait également l'instrumentalisation et les idées à court terme.

RESUMEN

Este análisis examina las políticas de apoyo a las familias con hijas e hijos, en particular las transferencias financieras relacionadas con las niñas y los niños y los servicios de educación y cuidados en la primera infancia (ECPI). El estudio se centra principalmente en países con estados de bienestar institucionalizados (fundamentalmente de Europa occidental y otros países de la Organización para la Cooperación y el Desarrollo Económicos, OCDE), puesto que es en ellos donde el apoyo y los servicios relacionados con las hijas y los hijos cuenta con una trayectoria más dilatada. Desde un punto de vista temporal, el análisis se centra en el despliegue de las transferencias y servicios pertinentes, desde sus inicios en los primeros decenios del siglo XX hasta las reformas que se están acometiendo en la actualidad.

Se detectan algunas tendencias claras. Entre las más significativas figuran un recorte gradual de las transferencias financieras relacionadas con las hijas y los hijos en favor de los servicios ECPI; un cambio progresivo hacia un mayor gasto en niñas y niños de corta edad; una selección más precisa de familias de ingresos bajos; y la utilización de una política relacionada con la infancia para dotar al empleo en este sector de atractivo a los ojos de la ciudadanía y de la capacidad de ofrecer ingresos adecuados. No obstante, hay que señalar la existencia de importantes variaciones, ya que en cada

región se adoptan enfoques diferentes. En la Unión Europea se sigue prefiriendo una cartera conjunta de servicios y transferencias de efectivo (si bien con algunos cambios significativos); en otros lugares del mundo (especialmente en América Latina) se registra una tendencia a las transferencias monetarias condicionadas y una expansión de los programas de guardería infantil.

El análisis hace hincapié en varios conceptos clave pertinentes para la planificación de las políticas y la adopción de decisiones en materia de transferencias relacionadas con la infancia y servicios ECPI. El primer aspecto importante que es preciso señalar es que las políticas relacionadas con la infancia responden a una serie de fines y que cada tipo de política persigue objetivos específicos. También es necesario reconocer que cada tipo presenta fortalezas y debilidades específicas. Entre las ventajas de las transferencias relacionadas con la infancia, por ejemplo, cabe citar su flexibilidad y sus diversas modalidades. Los servicios ofrecen la ventaja de garantizar que se utilice el acceso al producto deseado y, cuando su prestación o dotación se lleva a cabo a través de medios públicos, la disponibilidad de dicho acceso.

Las transferencias financieras relacionadas con la infancia y los servicios ECPI no deben ser considerados como opciones excluyentes entre sí. Ambos son

necesario: un enfoque que combine ambos tipos de medidas se antoja ideal. Por otra parte, el objetivo debe ser un apoyo continuo durante todo el ciclo de vida. La investigación señala que los países que ofrecen un apoyo más intenso obtienen mejores resultados. Uno de los principales aspectos subyacentes es que los efectos de las diferentes medidas dependen de la complementariedad, y que para obtener los mejores resultados es necesario considerar las medidas desde un punto de vista global. Así, el desafío consiste en diseñar medidas que produzcan resultados positivos de manera simultánea.

Cuando se diseñan y se adoptan estas políticas, es necesario colocar en vanguardia las necesidades y el bienestar de las niñas y los niños. Aunque esto puede parecer obvio, el hecho de que la finalidad de las políticas sea cumplir varios objetivos (además de mejorar los puntos débiles de las políticas) puede generar una situación en la que las niñas y los niños no sean la consideración fundamental de las medidas que supuestamente los benefician. El bienestar y la representación de las niñas y los niños deben tener protagonismo.

No cabe duda de que los servicios y las transferencias relacionadas con la infancia tienen una importancia y una incidencia destacada sobre las mujeres y la desigualdad de género. A lo largo de su historia

y hasta la actualidad, las ayudas y los servicios de apoyo a la infancia han transitado por la delgada línea que separa el hecho de proporcionar a las mujeres recursos adicionales y el confirmar a estas en una función doméstica (aumentando, por tanto, sus responsabilidades de manera significativa). Con frecuencia el género se deja en un segundo plano a la hora de diseñar estas políticas. Este examen señala la necesidad de que la igualdad de género sea una consideración primordial en estos (así como en otros) ámbitos de política, al igual que su repercusión sobre la incidencia de mujeres y hombres.

Además del género, existen otras líneas de división potencial asociadas a estos servicios y transferencias. Algunas disposiciones presentan el riesgo de tener un efecto regresivo. Esto sucede especialmente con los servicios ECPI, que en algunos países tienden a ser utilizados especialmente por familias de ingresos bajos. Es necesario adoptar medidas, como por ejemplo la selección, para potenciar la demanda entre los colectivos de ingresos bajos. Un enfoque intersectorial (que reconozca las interconexiones entre las divisiones y desventajas asociadas al género, la edad/generación, la clase social y el origen étnico, entre otros) no solamente serviría para evitar efectos de compensación no deseados, sino también para reducir el instrumentalismo y la mentalidad cortoplacista.

INTRODUCTION

This review examines policies for the support of families with children, in particular child-related financial transfers to families and early childhood education and care services (ECEC).¹ There are four main goals :

- analyse and compare the two types of policies;
- identify policy trajectories and the main influences on developments;
- trace the associated outcomes for gender and other types of inequalities within and across countries;
- consider current and likely future developments and the factors that will influence them.

The report is especially interested in identifying the differing emphases placed on these two forms of support for families with children and how and why the popularity of each varies across time and place.

¹ I acknowledge with thanks the guidance, help and feedback provided by the Secretariat – and especially Shahra Razavi – as well as the insightful comments of the referees.

The analysis is mainly focused on countries with institutionalized welfare states – mainly those of Western Europe and the Organisation for Economic Co-operation and Development (OECD) area – because it is here that child-related benefits and services have the longest history.

The report is organized as follows. First, there is a discussion of basic concepts, the analytic approach taken and the methods of research. The next section traces the origins of the two types of policy and their development trajectories over time. The third section looks at evidence about impacts associated with child-related financial provisions and ECEC. In the fourth section the focus is on developments in the current period. The intent here is to identify contemporary policy directions and shed light on the factors that are influencing these and likely future trends. The final section outlines some key lessons from the analysis.

KEY CONCEPTS, DEFINITIONS, ANALYTIC FRAMEWORK AND METHODS

Family policy is the most obvious policy ‘home’ of child-related transfers and ECEC. But there is considerable uncertainty over the scope and objectives of family policy and no fixed definition prevails (either for policy or academic purposes). It is possible for the definition to be very broad and include, for example, policies on education, health and housing as well as civil law on marriage and legitimacy (Gauthier 1996; Saraceno 2011). In the hands of social policy analysts though, family policy is usually conceived of in terms of income supports and services that seek to affect the well-being of children and the management of gender and generational relationships. For the purposes of this report, family policy is defined as “measures directly targeted at families with dependent children” (Gauthier 1996: 3). It is not a term that we will use often here, given that it is not the focus of analysis. But it is important to bear in mind that the policies that are to be considered here – child-related financial transfers and ECEC – are part of a broader policy edifice and constitute a core element of how the family is viewed not just by the state but also by society.

Public support to families with children takes three main forms: money/income, services and time (usually meaning time off from employment through leave for parents). It is the first two that interest us in this report. When it comes to money, financial transfers are one of the core constituents of family policy and have a history in Europe and elsewhere in the high-income countries that dates back over 100 years. Government financial support to families in the form of child-related transfers is of two main types: cash transfers through the social policy system; and transfers through the tax system (usually either a tax allowance or a tax credit) (see Box 1-1). ECEC, the second focus of analysis, refers to the provision of care and/or educational services to children below school age.

It is customary to make a differentiation between provision for children aged under 3 years and those aged between 3 years and school age. This is in recognition of the very different care and educational needs of younger children and the power of cultural prescriptions and norms about the best form of care for children of different ages.

The review’s conceptual framework treats the provision of transfers and services as embedded in relations of power around access to resources (Razavi 2011; Bedford and Rai 2013; Chopra 2013). Hence, transfers and services have to be seen as ideologically and politically contested. As well as framing opportunities, relationships and resources

BOX 1-1

Key Terms and Definitions

Child-related cash payments:

A cash payment made to one of the parents (or the guardian) for each child on a regular basis, most widely instituted on the birth of the child and paid until the child reaches school-leaving age (or later if s/he continues in education or has a special set of needs). These are generally funded through general taxation but they may also involve contributions from employers. They may be universal and/or targeted at the poorest families and the amount paid varies based on the age of the child, the number of children and the financial circumstance of the family.

Child-related tax reliefs:

- (i) Child tax allowances: An allocation of income in respect of children that is disallowed for the purposes of income tax liability. Child tax allowances imply a reduction of taxable income by a given amount per child for one of the parents, or both if the tax is calculated jointly.
- (ii) Child tax credits: These are credits allowed by the tax authorities to individuals in respect of children. They can be either wastable or refundable. Wastable tax credits can be used only as long as the tax liability is positive whereas refundable tax credits can be used although the tax liability is zero (in which case they can be paid as a transfer from the tax authorities) (Ferrarini et al. 2012: 9).

Early childhood education and care (ECEC)

Services for young children provided outside the parental home (in other homes on a paid basis or in a nursery or crèche, for example) or in pre-school provision for children under compulsory school age.

among individuals, these and other social policy provisions reflect different struggles for equality – between genders, especially, but also between socio-economic classes and even generations. Looking at developments from a gender perspective in particular, the evidence will show that many of the relevant policies have not been particularly oriented to gender equality or women’s rights, although women’s political agency has had significant successes also. It is argued that despite the less than dominant presence and influence of women’s movements in shaping the field, the policies that have been put in place can nevertheless, depending on modalities of provision, potentially have a positive impact on women’s capacities to meet their practical and strategic interests. A key task is to consider the long sweep of and underlying motivations for different policy modalities and the conditions that they set up for women’s potentialities (as well as those for other family members).

This is a review of policy, and the methodology used reflects the review’s objectives. Two main methods are used: (a) analysis of secondary and aggregate data and (b) review of evidence and interpretations from existing research. The empirical evidence is drawn from a range of sources. These include policy and other databases (especially those of the European Union (ESSPROS) and OECD (Family Database, Social Expenditure Database). In regard to evidence from academic and other work, particular attention is paid to critiques and reviews of policy and also, where available, evaluations of policy initiatives and their impact.

Temporally, analysis is focused on the unfolding of the relevant transfers and services from the period of their inception in the early decades of the 20th century to the reforms that are currently underway. Geographically, as noted above, the scope of the report is the OECD area (33 countries). However, a narrower canvas will be taken where more profound analysis is required. At a number

of stages throughout the report – and especially for the purposes of indicating key reforms – discussion will centre on one or a small set of countries that exemplify quite different approaches and experiences. The pictures will be drawn mainly from Germany, Sweden and the United Kingdom, three countries that represent iconic ‘systems’ of family support (and gendered welfare states more generally). At stages throughout the report, as appropriate, an attempt will be made to include developments in other regions of the world.

The analysis faced a number of challenges and limitations. With so many countries to cover, some

sacrifices as regards depth of coverage are inevitable. Constraints arising from available information also imposed limits. In particular, it is very difficult to draw conclusions about both impact and determining influences, not least because precise and comparable evidence across countries is not available on individual policy areas or programmes. Furthermore, because of the large scope one is forced to use rather broad bands of time, especially when charting historical transformations and searching for commonalities. This tends to emphasize broad detail over regional and national context and variation.

2.

HISTORICAL DEVELOPMENT AND POLICY TRAJECTORIES

This section considers how the two domains of policy have developed over time, identifying the critical periods, the decisive factors and the key commonalities and differences among countries.

2.1

Development and growth of child benefits

Within a decade of the end of World War II, state-financed economic support for families became a nearly generalized feature of the most advanced market democracies across the world (Montanari 2000: 307–8). Why did this happen? There are four main roots of child-related financial transfers to families in the high-income countries.

1. Eliminating poverty and hardship among families was a widespread motivation for the introduction of child-related financial transfers. This concern trained the spotlight initially on the most needy sectors of society and so the first such transfers, introduced between the 1870s and 1920s, were directed at special categories of families, typically necessitous mothers, widows and orphans. A similar kind of concern led to the growth of a second route to financial transfers to families – employers adding subventions to wages for fathers. This too was selective in that only some employers engaged in the practice and it took hold only in some countries (principally Austria, Belgium, France, Germany, Italy, the Netherlands and Spain). The trade unions, while initially largely in favour of the wage subventions, eventually took an oppositional stance because they saw them as

pre-empting the case for collective wage negotiation and potentially subsidizing low wages. Feminists also opposed the practice, recognizing the gender inequalities inherent in the subventions. Despite some opposition, employer-based child benefits endured for quite a long time in Europe, but they were gradually replaced following World War II by a generalized public system of financial support for families.

2. Redistribution and social justice were also classic motivations for child-related financial transfers. The chords struck by transfers from this vantage point supported a sense of the family as an institution of social stability and also of children as key to societal renewal and continuity (the next generation of citizens). Through a social justice lens, supporting and helping families with children may be regarded as part of the obligations of the state. The form of equity that is involved here is not so much between socio-economic groupings as between those sectors of society who have children and those who do not. This perspective on justice and equity is supportive of using public funds in a spirit of solidarity with families raising children. It also tends to favour a universal approach.

3. Matters relating to the general health and reproduction of the population also figured among the motivations for introducing and reforming child-related family policy. However, the importance placed on this varied from country to country. France is the European country where the historical association between family policy and boosting the birth rate is the closest, but concerns about birth rates and population health have coloured family policy discussion and reform almost everywhere at one time or another. Viewed through this lens, child-related transfers to families act to affect the reproductive behaviour of citizens by offering incentives and disincentives around childbearing and childrearing.

4. Gender-related considerations are another long thread in the development of child-related provisions, although the extent to which and how gender inequality was problematized for the purposes of family policy has varied across countries. Rather than gender as we understand it today, the underlying concern reverberating in the early debates about child and family

support was about mothers' well-being and access to income (see Box 2-1). This has broadened over the years to focus on gender inequalities more widely, but in the early years the concern was mainly about mothers having some independent income over which they had control for the purposes of child welfare. Present in the debates also was the possibility of recognizing the work of mothers – in some countries the idea of child-related transfers was inflected with the notion of a maternal wage. While a maternal wage was never really implemented anywhere, the idea(l) of women as the appropriate recipients of benefits for children took hold and in most countries, either initially or over time, mothers were made the beneficiaries of these transfers (with men more likely to be the recipients of tax allowances and most other transfers). While women received these 'stipends' on the basis of their status as mothers, the transfers were not formally conditional on how mothers performed their role, as is the case with many of the conditional cash transfers so prevalent in some of the middle- and low-income countries today (Molyneux 2008).

BOX 2-1

Early Feminism and Child-Related Transfers

Early feminist discussion and mobilization around social policy drew from different philosophies of gender equality and the role of women. One such philosophy was about motherhood and difference, which informed Eleanor Rathbone's position on child-related transfers in the United Kingdom in the early 1920s, for example. Rathbone wanted women to be rewarded for their work as mothers (Lewis 1991: 74). This position, while radical in some respects, left the gendered division of labour unchallenged. And this is Lewis's conclusion (ibid: 74) about the child-related cash transfers introduced in the United Kingdom in 1946: that they sought to mediate unequal outcomes in terms of the division of resources within the family without seeking to change the structures that gave rise

to the inequality in the first place. Karen Offen (1991: 144) (speaking of France in particular) identifies the underlying philosophy there as relational feminism. Influenced by decades of French collectivist and corporatist thinking as well as by social Catholicism, it viewed the family as the basic social unit in the Republican nation state and placed the rights of women as women and as mothers within a framework of male/female complementarity: 'a natural sexual division of social labour predicated on physiological differences between the sexes' (ibid). It may not be a coincidence that family policy in France has always been strongly inflected with a sense of protecting the family as a collective institution and that gender equality has never featured prominently there as a motivator of social policy.

Notably, children did not feature prominently in the early reform efforts, and certainly not as prominently as they do today.

These drivers of policy should not be treated as historical artefacts or out-dated rationales. Not one of them can be considered as ‘settled’; in fact they keep recurring in public discourse and political argumentation across the world. The complexities and struggles that they carry forward should not be under-estimated either. Concern about the ‘moral hazards’ perceived to be associated with giving families extra money for children make policy makers wary that they might be ‘encouraging’ men or women to be ‘irresponsible’. Fertility rates across different social classes were another common source of concern in Europe historically, and in particular the fertility patterns of minority groups, including ethnic and racial groups. The salience of these kinds of concerns, as well as financial considerations, tends to determine whether countries attach conditions to their child-related income transfers or not. European and other highly developed countries have known a variety of such conditions, including: means tests; either increasing or reducing the benefit for larger families; excluding parents who are not economically active; and directing tax reliefs at the families with the highest incomes (Wennemo 1994: 25). All of these debates are still present today and attend not only the reform of benefits in the high-income countries but also the introduction and growth of conditional and other cash transfers and other measures elsewhere.

From their inception in the first three or four decades of the 20th century, child-related financial transfers went through a number of phases of development. By around 1950 almost all countries in western Europe had some system of state-financed, child-related transfers in place. These included both cash payments and tax allowances, but the latter did not significantly affect the majority of wage earners as they did not earn enough to achieve a taxable income (Montanari 2000). And so cash transfers were the predominant means of assisting families with the costs of children

in Europe at that time. There were striking variations across countries though.²

Over time there was a move to universalism – to put in place generalized systems of financial support for families with children that covered most if not all families. But this was relatively short lived. From the 1960s on – when the economic, social and demographic environment of families changed rapidly and poverty was ‘rediscovered’ in many countries – the policy based on universal family policy support and full employment was subjected to critical scrutiny (Gauthier 1996: 11). After this period, the pendulum swung in the direction of prioritizing financial assistance for less well-off families with children. This was partly out of a wish to better support such families, but it is traceable also to a desire to reduce public spending and to long-standing doubts about universal and unconditional payments to families. Transfers for lone-parent families and benefits to help with the costs of housing were among the measures introduced or expanded during this period. However, it should be noted that a tradition of universalism in regard to child-related transfers was retained in the Nordic countries as well as Austria, France, Ireland and the Netherlands (and in the United Kingdom up until 2012).

The equity and efficiency of support through the taxation system was also being continually rethought – over time there was a move away from tax allowances towards tax credits, which are seen to be fairer since they do not benefit higher income earners to the same extent as tax allowances and can be paid to people who may not have taxable income (see Box 1-1). The move from tax allowances to tax credits has been identified as one of the most substantial changes in the system of child-related financial transfers since 1980 (Ferrarini et al. 2012: 10). This is also driven, especially recently, by efforts to make employment more worthwhile for those in low-paying jobs.

² At that stage only Australia, Canada and Sweden had a universal system of child-related cash transfers (Montanari 2000). Some (such as Denmark, Germany, Japan and the United States) relied on tax allowances; others (such as Austria, Belgium and France) had employment-based cash benefits while still others (including the United Kingdom) had mixed systems of tax allowances and cash transfers.

2.2

Development and growth of early childhood education and care

There were two main junctures in the development of ECEC in Europe (Bahle 2009). The first was related to industrialization and nation building (mainly in the early decades of the 20th century); the second was associated with the transition to the service economy and the parallel rise of female employment (in the 1970s). Different influences/interests were at play in each period. In the first period, ECEC had strong roots in the welfare-related activities of religious and philanthropic groups. These targeted families from poor or modest backgrounds where mothers needed to work on financial grounds and children were seen to be ‘at risk’ for this and other reasons (Gauthier 1996: 53). Looking at Europe as a whole, minimal ECEC provision existed until after World War II, at which point the national authorities started to assume a responsibility to provide this. From the 1960s and 1970s on, ECEC became more widespread, driven by interests around the well-being and development of children and also by moves towards gender equality and women’s employment in particular.

ECEC is not unidimensional, however, and should not be viewed as such. It can be looked at as a form of education and early learning provision or through

the lens of the welfare and care of young children. Scheiwe and Willekens (2009) suggest that ECEC be thought of in terms of two ideal types (see Table 2-1). The first or educational model rests on the belief that children below the age of compulsory education need educational services and that these should be provided publicly (or be available to all as much as possible). This conviction can be grounded in different philosophical orientations, including a pedagogical rationale (preparation for school), egalitarianism (compensating children from poor backgrounds and helping them overcome any disadvantage), nationalism (citizen education to instil national values in children from a young age), diversity (cultural mixing and standardizing the education of children from a young age) and social cohesion (inculcating social skills and striving for integration early). It is universalist or generic in approach, concerned about the early education of all children. Belgium, France, Italy and Spain are the European countries where ECEC draws primarily from this perspective. The second ideal type is centred around the reconciliation of care, welfare and paid work. The goal here is either to protect children whose parents have to be employed

TABLE 2-1
Two Ideal Types of Early Childhood Education and Care

Institutional dimension	Educational model	Work-care reconciliation model
Access	Universal	Targeted
Entitled person	Child	Parent/child in need of care
Pedagogical concept	Educational goals	Mainly care
Group size and organization	Relatively big groups	Smaller groups
Professionalization of staff, payment	Teacher training and pay	Lower level of professional education and payment than teachers
Fees	No fees for school	Subsidized but parental fees
Financing bodies	As for schools national or regional financing	Mixed financing
Administrative competence	School authorities	Social welfare authorities
Time patterns	Opening hours and holidays like schools	Varying

Source: Scheiwe and Willekens 2009: 9.

or to enable parents (mothers especially) to work outside the home. This type of provision tended to be more selective historically, focused on the welfare of children in need (whether that need derived from economic conditions or the need for care). This type of orientation prevailed historically in the Nordic countries, Germany and the United Kingdom.

While these ideal types do not exist in pure form anywhere, and it is important not to pose rigid distinctions between them, the framework helps one to appreciate that there are different conceptual models of ECEC and that the orientation to ECEC varies over time and across countries and cultures.

In terms of how ECEC has developed over time, there has been a general move in the direction of the educational model. Moss (2006) suggests that this took place in two waves: the 1970s and the last decade or so. The Nordic countries were to the fore in the first wave. While ECEC in Scandinavia has its roots in the care or welfare paradigm, these countries led the way from the 1970s on towards universal ECEC provision that has a strong pedagogical orientation. Sweden (and to a lesser extent Denmark) now have ECEC systems that have integrated the two types of provision, offer an entitlement to a place to all children from the age of 12 months and are mainly tax financed. What changed or drove it forward was the commitment to parental (especially maternal) employment and the recognition of a societal obligation to bring about optimum child

development (Mahon 2002; Scheiwe and Willekens 2009). In essence, in these countries the ECEC arrangements rest on principles of universalism and equality (Borchorst 2002). Countries such as New Zealand (1986), Spain (1990), Slovenia (1993) and England and Scotland (1998) formed the second wave in 'educationalizing' ECEC (Moss 2006: 163). However, integration in these countries (with the exception of New Zealand) is less complete as compared with the Nordic countries.

On the basis of the experience of a range of countries, the move from a care-oriented system to one that is primarily education-oriented tends to involve one or more of the following:

- 'filling out' a patchwork care system and moving towards universalism;
- putting in place national curricula and a centralized funding system;
- improving training and overcoming divisions between highly trained educational staff and typically more poorly trained nursery or care staff.

Overall, however, it would be inaccurate to paint a picture of complete integration or homogeneity. The latest data available from the EU indicate that ECEC provision and attendance are typically part-time and that most countries operate a split system – of childcare provision for children under 3 years and pre-school education for those aged between 3 and 6 years (European Commission 2013a).

2.3

Child-related transfers and ECEC in relation to each other

Child-related financial transfers and ECEC developed quite separately in the OECD countries. This was for three main reasons. First, each was seen as oriented to quite different objectives or 'problems'. Child-related transfers or income subsidies to families were conceived as an expression of solidarity with parents or families or as an anti-poverty measure, whereas ECEC tended to be viewed in terms of the child (as a focus of either education and development, child welfare or children's rights) and/or parental/family need for childcare.³ A second reason was that each tended to be governed by

different departments or administrative units (ministry of social welfare/social security for the former and either education, health or child welfare for the latter). In some countries also child-related financial transfers are a central government responsibility whereas ECEC is governed by the municipalities. Thirdly, the timelines and reform spurts were different as can be seen below:

Despite their different development trajectories, transfers and ECEC are increasingly being conceived of in

³ Unlike in Latin America and other regions today, where ECEC is seen also as an anti-poverty measure.

a more integrated fashion. One significant reason for this, especially in the European context, is the emergence of more integrated perspectives that conceive of services and child-related financial transfers together and as nested within a larger set of social policy provisions. To take two examples of changes in ideas: (a) a children’s rights perspective tends to emphasize children’s citizenship and so brings together civil, political and economic/social aspects; and (b) the EU’s relatively consistent focus on child poverty for the last 10 years or so also espouses a holistic view merging adequate income support, access to quality ECEC and other services and activation measures that enable adults to be employed. This kind of ‘joined up’ philosophy informs the EU’s latest statement of policy as well: Recommendation on Investing in Children (European Commission 2013b). Integral to developments also is an evolving concentration on children and their needs. A strong case is made for interventions on the grounds of child development

(Brooks-Gunn 2003), particularly service-based interventions (like ECEC). On the costs’ side, there is also the growing recognition that children bring with them not just direct costs – such as food, clothing, and schooling – but indirect costs as well. The latter relate to income foregone, such as when a parent drops out of employment or reduces working hours to care for children, or when women’s career prospects decline following the birth of a child (Letablier et al. 2009: 17). For much of the 20th century, it was only the direct costs of children that were recognized by social policy – the growth of feminist-inspired work played an important role in highlighting that child-rearing had indirect costs and that such costs primarily related to women (Davies and Joshi 1994; Sigle-Rushton and Waldfogel 2007). Policy makers have gradually come to the awareness that economic development and demographic renewal is integrally tied up with supporting children, women, men and families.

TABLE 2-2
Timeline and Spurts Financial Transfers

Child-Related Financial Transfers		ECEC	
1870s-1920s	Selective measures to relieve family poverty	1920s-	Small-scale and selective provision
1940s-1960s	Transfers institutionalized and generalized	1970s-	Instituted in most countries
1960s-1970s	Move to targeting families in need	1990s-	Expanded and consolidated
1980s-	Move to tax credits, integrating provision		

3.

WHAT VARIATIONS AND IMPACTS ARE ASSOCIATED WITH CHILD-RELATED TRANSFERS AND SERVICES?

To speak of both child-related transfers and ECEC in the singular is misleading for each varies widely in modality and form. Such variations make a huge difference to the benefit or service actually received by children and their families. They also allow policy makers a range of choices when they institute new policy or undertake reforms.

3.1

Variations in modality

To take financial transfers first, provision in countries in the OECD region shows five main sources of variation:

- the generosity or amount paid;
- whether allowance is made for the age of the child;
- whether allowance is made for family size or the number of children;
- the upper age limit for benefit cut-off;
- the universal or targeted nature of the provision.

Working through these on the basis of evidence for the OECD for 2009–2010, the value of the cash benefits equals on average some 5 per cent of the average production worker's wage (Table PF1.3.A, OECD 2012a). Countries that pay the most generous benefits (on the above basis) include Australia, Austria, Hungary, Ireland, New Zealand and Slovenia. Of the 32 OECD

members for which information is available, 20 make no adjustment as the child ages. Of those that do, most adjust the level of the benefit upwards as the child gets older but a few (e.g., Denmark and Iceland) reduce it. Countries commonly taper the benefit for the number of children – only eight fail to do so. When countries do this they generally favour larger families for this purpose (France, Hungary, Italy and Sweden). The modal upper age limit for child benefit receipt is 17 years, but most countries continue to pay for another year if the child is pursuing education. Family cash benefits are most commonly universal in nature – the majority of countries (19) do not means test the benefits. Of those countries that do, means testing is most common in OECD countries with low levels of social expenditure devoted to families with children. In the EU setting, it is most common among the Southern European and Central and Eastern European countries (Letablier et al. 2009).

When it comes to ECEC, the main systemic variations⁴ relate to:

- the public or private nature of funding and provision;
- the distribution of provision between care and early education or pre-school;
- access and enrolment rates;
- the share of the costs borne by parents.

The OECD database (Table PF4.1.A, OECD 2012a) indicates that almost all provision for 3- to 6-year-olds is public and pre-school in nature.⁵ The provision being referred to here mainly includes nursery schools or pre-schools, kindergarten and, in some instances, schools. Turning to the under-3s, provision is more likely to be managed by private stakeholders (both for-profit and not-for-profit), although there are significant cross-national variations. In the Nordic countries, for example, provision is both publicly funded and for the most part publicly provided. In other countries, a mix of funders and providers is more common although some 15 countries – out of the 34 in the OECD database – organize provision for this age group primarily through private sources (funding from parents and employers and provision by home-based, market-based and/or community services). This can include centre-based care (such as crèches or Krippen) or family day-care (traditionally provided in a home setting).

In terms of the costs of ECEC as a whole, the average in the OECD is around one tenth of family income (OECD 2012a). However, this varies widely: It is between 6 per cent of family income in Sweden and a third in the United Kingdom (for families with double the average wage). Not only are childcare fees high (with a lot of market-based provision) in the latter but also childcare-related transfers do relatively little to reduce the costs, whereas in the former fees are lower to begin

with (largely because it is publicly provided) and are capped. As Förster and Verbist (2013) point out, enrolment rates are closely linked to the supply of public childcare places for younger children, including along with costs factors such as the number of places available, the geographical spread and the opening hours of facilities. Van Mechelen and Bradshaw (2012) find that in the 26 highly developed countries they looked at, when childcare costs are added in to the child-related transfers for lone parent families on low earnings, they have the effect of turning the package negative in some countries. In fact, only in countries where childcare is heavily subsidized – such as the Nordic countries – does the child transfer package remain positive when childcare costs are added. Childcare costs are vital to families' standards of living, so vital that a recent report has recommended that they be included in poverty calculations (whereby they are deducted from income – as happens with housing costs – before poverty is measured) (Bennett and Daly 2014).

In terms of enrolment in ECEC and inequality, evidence and analyses are becoming available but they need to be treated with care (mainly because of shortcomings in the available information.). Bearing this 'health warning' in mind, recent OECD research (2013: 51) on 34 countries suggests that they divide into five groupings in terms of: (1) countries where the top quintiles produce fewer child enrolees and the lower quintiles proportionately more enrolees (Austria, Hungary, Italy, Luxembourg and, to a lesser extent, Mexico); (2) countries where the top two or three income quintiles are producing consistently more enrolees in public childcare and fewer enrolees as incomes fall (Canada, Estonia, Greece, Ireland, Poland and the United States); (3) countries where enrolment rates are evenly distributed by quintile (Belgium, the Czech Republic, France and Spain); (4) countries that slightly favour richer quintiles in terms of childcare enrolment (Australia, Denmark, Finland, the Netherlands, Norway, Portugal, Slovenia, the Slovak Republic, Sweden and, to a lesser extent, the United Kingdom); and (5) those favouring poorer quintiles (Germany, Iceland and Switzerland). Chile, which established free access to crèche and kindergarten services as a right for children from low-income families in 2009, should be added to the latter group (Staab and Gerhard 2011).

4 Other very important sources of variation relating to the quality, degree and form of regulation and also the training of the workforce are not considered here mainly because of sparsity of comparable information across countries and complexity of national settings.

5 That is, it is publicly funded and managed with more than 50 per cent of enrolments in these facilities.

3.2

Impacts: gender, child-related and socio-economic inequalities

The conceptual orientation informing this report spotlights three relevant lenses through which to examine the outcomes or impacts associated with child-related transfers and ECEC services: their implications for gender equality; their effects on child welfare; and their impact and implications for socio-economic inequality. Each will be briefly discussed in turn. The difficulty (if not impossibility) of linking outputs to particular policies – given knowledge gaps about single policy design parameters and their impacts, time lags in effects and the fact that individual policies are nested and take effect within an overall policy package – should be borne in mind.

In relation to gender, the most relevant impacts on which data are available relate to mothers' labour force participation (which can be taken as a proxy indicator for female independence and autonomy) and mothers' poverty risk.⁶

The evidence confirms that the nature of child-related provisions matters hugely for the level and quality of women's labour force participation (Mandel and Semyonov 2006; Lambert 2008; Pettit and Hook 2009; Hegewisch and Gornick 2011; Mandel 2011; Korpi et al. 2013). The steady upward push of female and maternal employment is strongly conditioned by social policy, especially ECEC. According to Keck and Saraceno (2013), the most effective policy to enable both mothers in general and low-educated mothers in particular to remain in paid work appears to be generous provision of ECEC for children under 3 years. Recent research by the OECD (2013) also tends to confirm this. Their analyses of spending suggest that increases in family cash benefit spending across pooled time-series is not significantly correlated with female employment (or fertility rates). ECEC spending

was found to be correlated with female employment, however (though not with fertility rates).

In general, research on the impact of ECEC highlights the costs of childcare as a major factor affecting mothers' labour supply (Akgunduz and Plantenga 2011). Other research spotlights the importance of the availability of ECEC rather than its costs (Hegewisch and Gornick 2011). As reported in Letablier et al. (2009: 116), when it comes to the impact on women's employment both demand and supply side funding can be effective in achieving policy goals as long as public support is only made available to good quality care.

Emerging evidence also suggests that the effects of provisions differ for mothers on their own as compared with partnered mothers. Investigating the effects of child-related financial transfers and ECEC as well as parental leaves on mothers' poverty risk, Misra et al. (2012) find that while child-related financial transfers help lower the risk of poverty for both partnered and lone mothers, they have a much bigger impact for the latter. Also the more generous the transfers are, the larger their impact for lone mothers. ECEC, too, is very important for lone mothers' chances of escaping poverty, especially for families with children aged under 3 years. Note that some of these effects occur because they enable the mothers to participate in paid work rather than raising income on their own (see also Bäckman and Ferrarini 2010).

One of the most important insights of recent research is that the socio-economic situation plays a role in conditioning the effects of family and other policies on gender inequality (Hegewisch and Gornick 2011). This is one reason why an intersectional approach focusing on interactions between factors such as class, gender and race is gaining in popularity (Choo and Ferree 2010). Mandel (2011), for example, suggests that countries characterized by generous family policies (such as the Scandinavian countries) tend to address gender inequality among

6 For a more exhaustive treatment, see the analysis of conditional cash transfers and gender relations in Latin America by Martinez Franzoni and Voorend (2012) who use four of Fraser's (1994) five principles of gender equality (anti-poverty, anti-exploitation, anti-marginalization and anti-inequality (time, income and respect)). [Fraser not in refs]

the least advantaged groups while exhibiting an unequal pattern of gender equality among the advantaged groups. This, she says, is in contrast to countries with less developed family policies (the liberal states), which tend to advance equality for advantaged groups but perform poorly on gender equality among disadvantaged groups. The more conservative countries (in the sense of those that seek to protect traditional family and gender arrangements) are situated in the middle in her analysis. The underlying lesson she draws is about trade-offs between different types of policies, although it should be noted that her analysis is limited to employed women. Korpi et al. (2013) have revisited the issue of the links between family policy and inequality and women's economic agency in 18 OECD countries. They find that while the major effects of policy are most visible for women without university education, a negative effect for higher-educated women is hard to find in countries that have well-developed policies. Hence, they dispute Mandel's points about the Scandinavian countries.

When it comes to the second type of impact – the situation of children and in particular addressing poverty among children aged under 6 years – both policies are quite powerful. However, the evidence is somewhat mixed in terms of which is more effective and efficient (OECD 2013); it also has to be interpreted with care. With regard to effectiveness, cash benefits seem to be more effective in reducing income inequality and income poverty in households with young children as compared with ECEC. This is mainly because cash spending outstrips spending on childcare services. However, when it comes to efficiency or value for money, ECEC performs better in reducing relative poverty in families with young children. This is because the costs of reducing child poverty proportionally across all countries are lower for investing in childcare services as against transferring cash. Analyses of ECEC at the household level also suggest that it can provide returns over and above cash interventions when combined with family cash benefits, particularly through enabling employment, which usually means higher income (ibid). The relationship between expenditure and the impact of child-related financial transfers is

strongly positive in that the higher the value of the benefit, the greater the reduction in child poverty (Förster and Verbist 2013).

BOX 3-1

Factors Making for Progressivity in ECEC in Sweden

- Sweden is one of the highest spenders on ECEC (allocating some 1 per cent of GDP);
- The additional 'effective tax' burden on second earners and sole parents entering work is low;
- It is national policy to keep childcare fees low (e.g., through capping of fees);
- The costs are shared between the state, local authorities and parents;
- Slots are guaranteed for every child.

Early intervention in the form of ECEC has been widely trumpeted as leading not just to poverty reduction but also to improvements in children's cognitive and social abilities as well as better outcomes in later life (Heckman and Masterov 2007). A lot of this research has been conducted on children in private or non-public childcare, which means that the impact on children from low-income backgrounds has been less well studied. The results of research on the impact of a range of types of ECEC across the income spectrum are now becoming available. Research from Germany, for example, reports positive effects of centre-based childcare on language skills and on social skills in the short run and greater gains for younger children and those from families where parents have lower education and income (Felfe and Lalive 2012). An increase in household income (through maternal employment) is part of this story though. Nevertheless, the authors (2012: 45) conclude that 'there are no costs in terms of early child development of setting up a tightly regulated and high quality system of formal child care. Quite the opposite, our findings indicate that universally accessible formal care can even contribute to decrease inequalities across

children from different backgrounds'. Other research is also confirming the additional benefits to children from low-income backgrounds (Havnes and Mogstad 2011). This raises the issue of the spread and availability of ECEC across the population.

Because of an uneven socio-economic distribution in ECEC, child-related transfers tend to be more progressive from an income or socio-economic perspective. This is because the low-income sectors of the population do not use or are not provided with ECEC to the same extent as high-income groups (Van Lancker and Ghysels 2014). European countries with very unevenly distributed ECEC use are Ireland, Luxembourg, the Netherlands, Spain and the United Kingdom. Disparities in the use of ECEC depend on how

services are organized and whether equality of access is a priority. Certain features of the organization of ECEC tend to make it more progressive, including the costs of accessing it and whether access on the part of low-income children and parents is prioritized and supported (see Box 3-1 for significant such elements in Sweden). In order to overcome barriers to access, some countries have introduced legal entitlements to day-care (e.g., Denmark, Finland, Germany, Norway, Sweden and the United Kingdom). Another strategy – followed by Austria, Cyprus, Hungary, Luxembourg and Poland – is to make the last year of pre-school compulsory. In Norway children from migrant and disadvantaged backgrounds get additional hours of ECEC free each week, and children from the two lowest income quintiles are prioritized.

BOX 3-2 Indicators of Quality

In regard to ECEC, Linda White (2012) has developed a set of indicators around building a system of provision. These include:

- the extent to which spending and policy support the supply of services ;
- the extent to which governments fund formal rather than just informal care;
- the extent to which governments make services available to all rather than targeting;
- the extent to which parents are helped with the costs;
- the extent to which governments impose national or centralized regulations and curriculum.

In regard to child-related transfers and family support more broadly, the United Nation's Children's Fund (UNICEF 2008) has suggested 10 benchmark indicators:

- a minimum entitlement to paid parental leave;
- a national plan with priority for disadvantaged children;
- a minimum level of childcare provision (25 per cent) for the under-3s;
- a minimum level of access for 4-year-olds (80 per cent for a minimum of 15 hours a week);
- a minimum level of training for all staff; - a minimum proportion of staff with higher level education and training;
- a minimum staff-to-children ratio (not greater than 15 to 1);
- a minimum level of public funding;
- a low level of child poverty;
- universal outreach (measured in relation to basic health-care services).

In regard to redistribution across income groupings, the evidence suggests that child-related transfers and subventions serve as an important (in some cases vital) top-up to existing incomes, especially for those with low incomes. This is true both for people in the labour market as well as those outside it, but it is especially the case for households with only one earner. Van Mechelen and Bradshaw (2012) show that of the 26 high-income countries they looked at, the living standard of one-earner families with children is above the poverty line in eight of them only because of child-related financial transfers.⁷ In a context of rising

poverty, welfare systems have had to work harder over the years to reduce the growing problem of poverty among those in employment; ultimately they have not managed to fully offset the increases in market income poverty (Richardson and Bradshaw 2012: 78).

Experiences and outcomes are fundamentally affected by the arrangements that are in place (and we have seen that these vary widely). Work is beginning to emerge on quality and effectiveness in these and other regards (see Box 3-2).

7 Austria, Czech Republic, Denmark, Finland, France, Greece, Italy and Latvia.

4.

CURRENT PATTERNS AND LIKELY FUTURE TRENDS AND INFLUENCES

4.1

Current and future trends

What is the current state of play as regards funding and programme emphasis?

Spending on family policy within the OECD area has been steadily increasing and (as of 2009, the latest date for which comparable data are available at the time of writing) stood at some 2.6 per cent of GDP on average (Table 4-1). France, Iceland, Ireland, Luxembourg and the United Kingdom are the highest spenders whereas Korea, Mexico and the United States make up the bottom of the table. When it comes to the balance between spending on the different types of policies, countries vary widely. In fact, as pointed out by Letablier et al. (2009: 11), the dispersion of levels of commitment to child-related supports, measured by the level of expenditure, is higher than for any other social protection function.

Cash transfers⁸ dominate family-related spending, followed by services,⁹ with child-related tax reliefs

coming in a low third (in terms of the proportion of expenditure for which they account). The Nordic countries subvert the pattern of financial transfer dominance though, spending more on services than on cash transfers or tax reliefs. The evidence hints that countries new to family policy (e.g., Chile, Korea and Mexico) tilt in the direction of prioritizing services; in Europe on the other hand there is a more cross-sectoral approach (a balance which we have seen is continually evolving). Although tax reliefs account for only about 10 per cent of all spending on family policy on average, countries vary significantly in their preference for supporting families through taxation. The countries that most use tax breaks are Belgium, Germany, Japan, the Netherlands, Slovenia, the United Kingdom and the United States. This is a historical pattern in most of these countries, but the United Kingdom is an exemplar country in regard to undertaking a strong move to use the tax system to support families with children (see Box 4-2).

⁸ It should be noted that under the heading 'cash benefits for families' the OECD data include spending on maternity, paternity and parental leave benefits as well as child-related financial transfers.

⁹ Note that services in the OECD database include, along with ECEC, home help for families and a suite of other family-related services.

TABLE 4-1

Public Spending on Family Benefits in Cash, Services and Tax Measures, in % of GDP, 2009

	Cash	Services	Tax reliefs for families	Total
Ireland	3.26	0.82	0.15	4.24
United Kingdom	2.46	1.38	0.38	4.22
Luxembourg	3.51	0.53	0.00	4.04
France	1.44	1.76	0.78	3.98
Iceland	1.58	2.38	0.00	3.96
Denmark	1.63	2.27	0.00	3.90
Sweden	1.58	2.17	0.00	3.75
Hungary	2.42	1.16	-	3.58
New Zealand	2.47	1.08	0.02	3.56
Belgium	1.77	1.04	0.64	3.45
Norway	1.42	1.79	0.13	3.34
Finland	1.67	1.62	0.00	3.29
Germany	1.16	0.89	1.01	3.07
Austria	2.34	0.57	0.04	2.95
Australia	1.94	0.84	0.05	2.83
Estonia	2.18	0.44	0.18	2.79
Czech Republic	1.24	0.60	0.76	2.60
Netherlands	0.78	0.93	0.77	2.48
Slovak Republic	1.57	0.44	0.41	2.43
Israel (1)	1.09	1.11	0.16	2.37
Slovenia	0.76	0.53	0.80	2.10
Spain	0.67	0.85	0.25	1.77
Portugal	1.03	0.47	0.20	1.71
Italy	0.78	0.80	0.00	1.58
Canada	1.12	0.23	0.21	1.55
Poland	0.75	0.33	0.45	1.53
Japan	0.51	0.45	0.53	1.48
Chile	0.74	0.74	0.00	1.47
Greece	1.02	0.40	-	1.43
Switzerland	0.94	0.33	0.14	1.41
United States	0.11	0.59	0.52	1.22
Mexico	0.40	0.70	0.00	1.11
Korea	0.04	0.77	0.20	1.01
OECD 33-average	1.41	0.94	0.28	2.61

Source: OECD Family Database, Table PF1.1A (OECD 2012a).

Notes: Public support only concerns public support that is exclusively for families (e.g., child payments and allowances, parental leave benefits and childcare support). Spending recorded in other social policy areas such as health and housing support also assists families, but not exclusively, and is not included here.

- Data missing for Turkey. Data on tax reliefs for families are not available for Greece and Hungary.

Putting the information on spending together with other information on and analyses of the nature of provision, there have been four main lines of change over the last 10 years or so.

1. There has been a gradual cutting back on child-related financial transfers in favour of ECEC. This pattern appears to have become established in the early 2000s (Förster and Verbist 2013: 15). When the pattern of spending is traced over time, OECD data for public spending on child-related services (which is mainly ECEC) in 33 countries between 1995 and 2009 show spending as a proportion of GDP up in all countries and significantly up in some (including Belgium, Chile, Iceland, Ireland, Italy, Korea, Mexico, Spain and the United Kingdom) (OECD 2012a). In the same period, spending on child-related financial transfers as a proportion of GDP fell in half the countries – mainly the EU member States – although it rose in others. However, it is important not to over-interpret this rather weak trend and to note, along with Van Lancker and Ghysels (2014), that spending on ECEC and parental leaves has not led to a crowding out of spending on child-related financial transfers. If we add in the increasing use of work-family balance measures (such as parental leaves) which have not been considered here, the overall picture is of a changing infrastructure of child-related policies and a ‘fleshing out’ in terms of policy mixes.

2. A gradual shift has taken place towards more expenditure on younger children (those aged 0 to 5 years) – although spending on the oldest children (those aged between 12 and 17 years) still dominates (mainly because of educational spending).

3. Within the financial transfer systems, there has been a move towards fiscalization (Ferrarini et al. 2012), as manifested by the increasing use of taxation-based measures (as against cash transfers) in family support. This is associated with more targeting of low-income families and a desire to make employment attractive to people and capable of offering them an adequate income. It should be noted that there are gender implications here in that it is men who tend to be the main recipients of tax-based benefits. This

is not inevitable though – in the United Kingdom under the Labour governments between 1997 and 2010 women were specifically made the recipients of tax credits associated with children (Daly 2010).

4. Outside of Europe and the most highly developed countries, there is a move to conditional cash transfers and an expansion of day-care programmes for children. This is especially the case for the Latin American region – the United Nations has indicated that some 25 million households (133 million people) in 18 countries of Latin America and the Caribbean receive conditional cash transfers (UN 2012: 4). These generally operate on a number of assumptions, combining direct assistance to households with service access and utilization. Barrientos (2011) suggests three main rationales for the growth of these kinds of programme. First, conditions offer a signal to beneficiary households that investment in human development is considered important. Second, the focus on mothers is important because unconditional cash transfers may not be focused on raising the human development of children, especially girls. And third, pure income supplements might be insufficient to ensure access to health, education and other services in a situation where inter-agency coordination and priority setting are lacking.

What has happened since the recession set in after 2008? This is hard to ascertain because the data are patchy and little or no comparative research has been carried out. As regards spending, data for early in the recession period (2007 to 2009) indicate that very few countries had at that stage cut back on child-related social spending; indeed the OECD area as a whole saw a growth of 0.3 per cent under this spending heading in the period (OECD 2012b). The latest forecasts on social expenditure in general (up-dated data are not available for the OECD region) generally suggest that social expenditure will have remained high since 2009 and will fall only slightly in 2013 (OECD SOCX – OECD 2012a). But in some European countries – especially those most affected by the crisis – growth in social spending and GDP were both below the OECD average. Included here are Greece, Hungary, Iceland, Ireland, Italy and Portugal. Among the EU member

countries that had significantly cut back on their level and extent of support for families with children are Czech Republic, Ireland, Netherlands and the United Kingdom (Gauthier 2010).

On the basis of knowledge available from these and other sources, and indeed hypothesizing from recent trends and more long-term patterns,¹⁰ one might conjecture for Europe that the following trends will continue into the future and may even be intensified in a climate where public spending is primarily viewed through the lens of reduced expenditure, service cut-backs and austerity policies:

- A continued retreat from universalism – this is for budgeting reasons and also because of ideological change.
- A continued move to low-income targeting – this is for budgetary reasons as well but is also endorsed by the widespread commitment to austerity and to perspectives promoting self-sufficiency and ‘independence’. It should be noted that targeting tends to result in more modest benefit levels as compared with universal programmes (Ferrarini et al. 2012: 21).
- When it comes to ECEC it is difficult to predict what will happen. The most recent data (for 2011 for EU countries) indicate that the steady expansion of provision continues in Europe but at a slower pace. Between 2006 and 2010, provision for the 0–2-year-old age group grew from 26 per cent to 29 per cent and that for 3–6-year-olds from 81 per cent to 84 per cent (European Commission 2013a). Apart from a slowdown in expansion, there is also what might be thought of as a counter move: the introduction of choice-oriented home care allowances. Finland was a pioneer in this regard when in 1986 it instituted

a policy entitling any parent who stayed at home to care for their 1–3-year-old child to receive compensation from the government. Norway introduced a similar provision in 1998 and Sweden followed in 2008 with a home care allowance designed to be used (after the earnings-related parental leave period has ended) by those parents who wish to delay the start of ECEC (Duvander and Ferrarini 2013). Although these are formulated in gender-neutral terms, they tend to be supportive of more traditional family patterns, including female part-time or full-time homemaking. These developments indicate that traditional norms around motherhood continue and that such views still garner political support and the resources for reform (even in countries where dual-earner policies are well established). Other countries also are encouraging diversity (sometimes represented under the rubric of ‘choice’). France, for example, gives financial support to families to provide childcare at home, either by the parent or through the employment of a home-based childcare worker (Daly 2011).

The future may also see the growth of conditional cash transfers in Europe and other high-income regions. This has certainly happened with employment/unemployment-related transfers, receipt of which increasingly depends on people’s willingness to engage in employment-related ‘activation’ measures through education, training and/or job placement. Another factor that might drive this move is increasing utilitarianism in regard to social policy and especially income support. However, since there is no real tradition of conditional cash transfers in the child-related policy domain in most of the high-income countries – they exist in only a few EU member States (Bulgaria, Hungary, Romania and the Slovak Republic) – it is difficult to see them becoming widespread. The European Commission’s recommendation on investing in children (2013b) responds to the proposal to investigate making cash payments for low-income parents conditional on sending their children to ECEC by arguing for caution and recommending that the potential negative impact should be assessed. Such negative impacts include

¹⁰ For example, through the EU Network of Independent Experts on Social Inclusion – see <http://ec.europa.eu/social/main.jsp?year=2012&theme=0&catId=1025&langId=en&mode=searchSubmit>. See also the European Platform for Investing in Children: http://europa.eu/epic/index_en.htm and European Commission (2013c).

increased stigma, problems in take-up and lack of supply. But in the international development field, strong arguments are often made for the efficacy of channelling these payments via mothers.

Evidence from those countries that have used conditional cash transfers usually concentrates on the impact on children in poverty (see Barrientos 2011 for a discussion). But Molyneux (2006; 2008) focuses on the effects on gender relations, raising concerns that conditional cash transfers add to the gender-specific responsibilities of women, that they may invite a backlash from men and that they do not offer a long-term

strategy for women's economic security. In the view of Lopreite and Macdonald (2014: 5), the rapid spread of this type of social policy intervention throughout Latin America is a sign of both the highly gendered character of the new welfare regimes in the region and their increased attention to human capital formation

Looked at as a whole then, what we see are not linear processes of policy development but a scenario punctuated by reforms that involve new developments as well as a return to old principles – similar to what Razavi (2011: 880) has observed from a more global vantage point. The future is not foretold however.

4.2

Factors likely to affect future developments

As we look towards the future, mindful of the learning to be had from experience, it is likely that developments in child-related policies will be affected by three sets of factors:

- the political environment and political engagement with the issues;

- the prevailing economic and social context within and across countries;
- dominant beliefs and philosophies.
- The contours of each are briefly discussed in turn, and their impact in particular settings is illustrated through short case studies of reform in Germany and the United Kingdom.

4.2.1

The politics of child-related transfers and services

There is a wide range of actors with an interest in family policy. These include state actors, political parties and political movements, economic actors, churches, parents, professions, civil society as well as international organizations (Gauthier 1996; Bahle 2009). Looking backwards to the foundational period in Europe, the two political (f)actors that have been found to have had the greatest influence on the formation of family policy in 18 OECD countries are the political strength of women and the presence of religious or conservative parties (Wennemo 1994).

Analyses of the political influences on family policy generally attribute high significance to the role of women's movements and women in government (O'Connor et al. 1999). It is indisputable that the first wave of feminist activists played a major role in getting child-related financial transfers and benefits for women more generally onto the political agenda.¹¹ It is also known that feminist engagement with these issues has waxed and waned over time. Of course, it is also relevant to point out, as Sonya Michel (2002: 336) has done, that there is no singular feminist position on (child) care or family and that over time there has been a radical change in emphasis: from women's right to employment and economic independence to the right to provide or receive care. This lack of

¹¹ See the articles in Bock and Thane (1991).

‘settlement’ opens the way to policies that tend to favour ‘choice’ – a policy rubric that can author reforms to enable or encourage women to be employed or to subsidize caring at home (through home care allowances, for example, which as indicated tend to reinforce a carer role for women).

That said, the findings of Lambert’s (2008) analysis of 20 OECD countries, as well as those of Bolzendahl (2009) on 12 and Annesley’s (2010) study of the United Kingdom under Labour, are corroborated by many others: reform of the welfare state in the direction of gender equality and family policies that advance gender equality depends on the intervention of committed political actors with the power and resources to shape policy. Although women representatives are more likely to prioritize women’s and family issues, developments within and beyond Europe indicate that female power-holding is a necessary but not sufficient condition for policies oriented to gender equality (Nazneen and Mahmud 2012). In other instances, advocacy for children’s well-being on the part of policy elites and/or children’s rights advocates may drive the policy

process, especially at a time when attention to child poverty is heightened. This seems to have been the case in Argentina, Chile, South Africa and Uruguay (Razavi 2011), for example, and such actors have also been influential in Europe. As Staab (2010: 607) puts it: children have acquired a somewhat iconic status in current social policy debates.

What one might call ‘conventional’ politics is also crucial. Leftist parties had little interest in family-related policy initially; in many countries it was the conservative parties – such as the Christian Democrats or the agrarian parties – that fought for family benefits. Their conservatism meant that they valued the protection and support of the traditional family rather than rights for women and children. However, there has been significant change over time in political parties’ positions on family policy. Two such changes are noteworthy. First, child- and family-related benefits gained political currency on the left, so much so that support for children and female employment has tended to be higher under Left parties (especially Social Democratic parties) as compared with parties with other

BOX 4-1

Reforming Child-related Policy in Germany

In the last 15 years, German policy makers have transformed the nature of the country’s family policy system through a number of legislative measures, including the reform of paid parental leave to make it more encouraging of employment and a huge expansion of ECEC. Policy moved from supporting a traditional male breadwinner model to one more supportive of maternal employment and out-of-home education and care for young children. This radical change came about essentially because the Christian Democrats changed their position on family policy, and they did so mainly for three reasons. First, they wished to appeal to young women voters, whom they saw as wanting a more modernized form of policy that would be

supportive of their desire for independence and a career (Fleckenstein 2011). Second, and relatedly, they were concerned about the country’s low fertility rate and so veered towards a set of reforms that would better facilitate women (and men to a much lesser extent) to be both parents and workers. This is informed by the perception that the conditions of childrearing/bearing have changed and that in the current constellation higher fertility is associated with higher levels of female employment and a supportive welfare architecture. Third, these policies also gained the support of employers’ associations, which strongly favoured women’s greater participation in employment in order to help with labour shortages (Fleckenstein and Lee 2012).

ideological commitments (Sainsbury 1999; Huber and Stephens 2000). This line of explanation is especially significant for why the Nordic countries have the family and gender policies that they do: three of them (Denmark, Norway and Sweden) are characterized by long periods of government by social democratic parties allied with a powerful trade union movement, all of which are committed to a generous and universal welfare state in which gender equality is a core principle (Morgan 2008: 405). Second, and more recently, the conservative parties have changed their position on many areas of family policy. For example, the reforms in Germany over the last 10 to 15 years testify to conservative party support for policy encouraging higher female employment levels and the expansion of ECEC outside the home (Fleckenstein 2011; Morgan 2013). As the discussion in Box 4-1 shows, needing to appeal to women voters was a key reason for the change. The experience of Germany and other countries underlines how the multiple dimensions of child- and family-related policies lend themselves to coalition building, enabling parties with diverging perspectives to agree on reforms that meet multiple objectives, some of which may be in conflict with each other (Morgan 2008: 417).

A third set of actors is also crucial. These are the transnational governance institutions such as the UN and European Union (EU) and international

organizations like the OECD and UNICEF. These have been increasingly vocal about family- and child-related policies (and in some respects gender equality policies also). The UN, for example, has made a major contribution to concretizing child-focused policy and making it a recognizable and legitimate focus for policy makers. This is partly due to the UN Convention on the Rights of the Child, which generalized the understanding of the child as a holder of social rights. For its part too, the EU has been very active in promoting work-family reconciliation measures and social investment approaches (discussed further below). Among the actions taken was an agreement by the member States in 2002 on targets for ECEC (the so-called 'Barcelona targets') (European Commission 2013a). These set targets for 33 per cent of the 0–2-year-old cohort and 90 per cent of those aged between 3 and 6 years to be in ECEC by 2010. The OECD has also been espousing policy approaches that increase the human capital of children and the compatibility of employment and family life (OECD 2011).

While sometimes the perspectives and interests of the different actors overlap, more commonly they diverge. The point to take away from this is that child related and family policy is heavily contested, and how it develops in the future will be determined in part by politics and political engagement and the particular groups and interests that have power and influence.

4.2.2 Context

A second factor, or set of factors, determining how current and future policies play out is contextual in nature. Context has a number of meanings. Most obviously, it connotes both the historical pattern and legacies of social policy development in a country or region as well as resource availability. Wennemo (1994) and Gauthier (1996) illustrate the complex of factors at play. These pertain not just to the early family- and child-related provisions in the highly developed countries but also ongoing developments. A particular enabling factor is the availability of resources. In Europe the availability

of resources when the costs of war dropped was key to the institution and development of child-related policies: Taxes had been increased during World War II, but once it was over extra resources were available at no additional cost to the taxpayer. Resource availability has also been crucial to more recent developments in child-related policy. The rapid expansion of facilities and services that took place in Germany since the late 1990s (Box 4-1) and the United Kingdom under Labour between 1997 and 2010 (Box 4-2) is traceable in many ways in both cases to the availability of resources (as

well as, of course, to political will to commit resources to child-related policy). The availability or not of resources is not the only contextual factor determining reform of family policy, however. Considerations around the economy and the labour market are also crucial.

This points us in the present context to the recession. As discussed at various stages of this review, the orthodoxy around austerity as the best approach in the current situation in many countries with the most developed family policy has made child-related transfers especially vulnerable to cut-backs. But cut-backs or expansion in child-related policy are almost always filtered through the lens of developments in the jobs

market. In Europe, the latest evidence suggests a significant increase over time in female (and especially maternal) labour supply, which has continued during the economic crisis. Because of this, but also the fact that the recession hit men's jobs more intensively than those typically held by women, there has been a narrowing of the gender gap in full-time equivalent employment rates (European Commission 2013d).

This narrowing is as much (if not more) an artefact of the crisis as it is an outcome of policies around gender equality. In fact, the 'crisis discourse' has permitted gender equality policies to be put on the back burner. For example, an assessment of policies introduced in the 27 EU member States under the 2011 National Reform

BOX 4-2

Reform in Family Policy in United Kingdom under Labour

Between 1997 and 2007, successive Labour governments spent £17 billion on ECEC in England, basically turning it into a country with a vibrant and multi-dimensional family policy. Among the measures introduced were a free entitlement to ECEC on a half-time basis for all 3- and 4-year-olds, a programme to combat child and family poverty (through setting up 3,500 local Sure Start and later Children's Centres), more generous parental leaves and large increases in the level of financial transfers to families. This was a massive change in a country in which family policy could previously be said to have been 'underdeveloped'. Unlike Germany, feminist agency was directly important to this change in the United Kingdom. Women formed a significant subsection of both the Labour parliamentarians and cabinet (especially in the 1997–2001 administration), and the evidence suggests that they used their political power resources to actively promote issues around gender equality, especially from a female employment and work-life balance perspective (Annesley 2010; Fleckenstein and Lee 2012). But there were other factors at play also. Within the state bureaucracy, the Treasury (the finance ministry) drove forward child and

family policy. Its intent was to use family policy to increase both employment and employability of low-income and lone parents and improve the human capital of children, especially those from low-income backgrounds (Fleckenstein and Lee 2012). Thirdly, political leaders (especially Tony Blair and Gordon Brown) were committed to the issues and determined to make the necessary resources available (Daly 2010).

Recent reviews find that there were significant reductions in poverty among children and their parents (especially lone parents) over the duration of Labour's tenure of office (Bennett and Daly 2014; Hills 2013; Stewart 2013). For example, the relative child poverty rate (measured before housing costs) fell by more than a third between 1996–1997 and 2010–2011). This has already started to reverse though as the cutback policies of the current Conservative/Liberal Democrat government have started to bite. These are likely to have significant gender effects as well, not least in that they involve a single payment to the household and tend to prioritize the main earner in this and other regards (Bennett and Daly 2014; Browne 2011).

Programmes showed that only one tenth of the policy initiatives announced or implemented in response to the crisis took into account the gender impact at all policy process stages (Expert Group on Gender and Employment 2013, cited in European Commission 2013d: 182). The significance of all of this for child-related policy reform is that if women's labour supply and employment rates continue to rise without significant policy effort, then we could see a cut-back in those child-related measures that aim to increase mothers' employment and paternal involvement in family life.

Demographic developments are another inalienable part of the context of family policy reform. This is true not only in Europe but almost everywhere. We have seen in earlier sections of this report that the influence of demographic factors on family policy reaches very far

4.2.3

Discourses and ideas

A third set of influences is prevailing ideas, philosophies and debates. In the current period, there are a number of philosophies in play, some of which are competing. Social investment is one such philosophy. It emerged during the 1990s and has rapidly gained influence in Europe and elsewhere. It makes a case for social policy as a form of investment and extols labour market integration and skills development as one of the key functions of social policy. The primary role of the welfare system is not 'passive' income support but to develop human capital and facilitate integration into employment (Esping-Andersen 2009; Morel et al. 2012). The incentives and disincentives in social policies around labour market engagement become especially crucial from this perspective. Social investment is very favourable to the development of ECEC, which is depicted as essential to laying the foundations for skill acquisition and cognitive and other forms of development; a good foundation is said to endure over the long term (Currie and Gahvary

back in Europe and other parts of the world. Learning from what we already know, it is not so much the fact of demographic trends such as increasing ageing and falling birth rates that matter as the political reaction to these and related developments. In Germany, for example, the decline in the birth rate has been interpreted as a demographic crisis and it has therefore been instrumental in the major family policy reforms that have been carried out (Scheele 2013). Much of the social policy debate is dominated by the question of how to stop or lessen the declining birth rate: from approximately 2.5 children per woman at the beginning of the 1960s to around 1.4 children per woman today. One can expect demographic factors – including changes associated with migration – to have a major impact on child-related (as well as family-related) policies in the future.

2008; Heckman and Raut 2013). The OECD and the EU have especially taken up this argument for public support of ECEC (Mahon 2006).

A social investment discourse also informs the emphasis on conditional cash transfers focused on the formation of human capital among low-income children and/or youth in middle- and low-income countries, especially in Latin America (Martinez Franzoni and Voorend 2012). Commentators in this context see real opportunities here, pointing out how in Latin America, for example, social investment ideas have spurred significant development in ECEC (Staab 2010). But we should not rush to judgement because scholars have also pointed out that the extent to which social investment ideas can work to women's advantage largely depends on how they are translated into specific policy instruments (ibid). In the Latin American context, most of the current instruments aimed at relieving child poverty and investing in children are highly ambiguous from a gender equality perspective, as they often rely on the (unpaid or poorly paid) work carried out by mothers or female community volunteers (ibid: 608). Other work on the region also reveals the contradictory

¹² The National Reform Programmes are produced by EU member States annually, following strict guidelines by the European Commission, as part of the Europe 2020 strategy of structural and other reform to sustain growth and jobs for the Union as a whole.

dynamics associated with the expansion of ECEC development there (Lopreite and Macdonald 2014, forthcoming)

A second dominant discourse today is that of work-family reconciliation. This too is eclectic and used in quite diverse ways (Lewis 2009). The organization of key institutions is said to be adrift of people's life styles and ambitions – the perceived solution is of synchronizing the rhythms and exigencies of family life with those of employment and especially reducing the incompatibility between motherhood and paid work. The underlying objective is an optimum accommodation between both spheres of life, with an emphasis especially on enabling employment on the part of mothers and, to a lesser extent, greater involvement by fathers in family life. It is infused with a rhetoric of choice. The kinds of policies that are promoted in the name of reconciliation include flexible working arrangements, part-time work, parental leaves, ECEC and measures encouraging male participation in family life and domestic labour. As a policy model it portends increasing diversification of family policy and brings it much more into the realm of employment policy.

Both of these are philosophies about social policy. To have a hearing in the current climate, they have to find an accommodation with prevailing economic orthodoxies and, in particular, neo-liberal perspectives. The latter view welfare primarily as an individual-level phenomenon best secured through market activities rather than an interventionist state. Neither social investment nor work-family reconciliation is totally at odds with neo-liberal principles, though, in that they both tend to endorse the idea of 'inclusion' within the economic mainstream for all citizens as well as economic independence and competition in a globalized market economy. They diverge from the current economic orthodoxy

in several respects though, mainly in that they call for public investment.

One key question for the purpose of the present review is the extent to which and how contemporary perspectives engage with gender inequalities. Although social investment and work-family reconciliation show an awareness of gender inequality – recognizing the important role of mothers, for example – women's claims are not foregrounded in either. Jenson (2009: 470) worries that social investment signifies the return of naturalized notions of the mother-child nexus and that it has no terms to deal with or even interest in the structural inequalities that perpetuate gender and other forms of inequality. As compared with social investment, work-family reconciliation has stronger nuances of gender equality, seeking in part anyway to recognize caregiving and make time and resources available for it. However, gender inequality is not perceived in this perspective to be a critical axis of disadvantage (Jenson 2009). What were formerly women's interests become 'choices' for women, and while the family receives greater public attention, women are not central to the interest in the family (Simon-Kumar 2011: 451, 455). There is also the risk that the emerging policy consensus around 'reconciliation' has acted to construct family policy around employment-related objectives, to blur concerns about equity and even to corrupt the traditional compensation and assistance function of child-related and other areas of family policy (Daly 2005). Hence the charge of instrumentalism – the sense that parents and children are treated as instruments rather than as subjects of social policy – can be levelled at this perspective just as it can at social investment.

In practice these three sets of factors tend to be inter-related, as shown by the two pen pictures of recent reform in Germany and the United Kingdom in Boxes 4-1 and 4-2.

5.

POINTS TO TAKE AWAY

By way of conclusion, this review highlights a number of core insights relevant to policy planning and decision-making for child-related transfers and ECEC.

Policies have different objectives

At a time of increased interest in child- and family-related policy (Letablier et al. 2009: 9), it is important to be aware of the different objectives that can be aimed for:

- compensating for and helping with the costs of children;
- reducing poverty faced by families and children;
- promoting children's well-being, development and rights;
- supporting fertility;
- changing female and male employment rates;
- changing the nature and extent of gendered practices, relations and inequality.

Against this backdrop, it is important to be clear about what the objectives of child- and family-related policy are and what different approaches can reasonably be expected to achieve.

The strengths and weaknesses of different policy approaches need to be recognized

Each type of provision has its strengths and weaknesses. Among the benefits of child-related financial transfers are their flexibility and the fact that they have a range of modalities. They are also generally transparent in their effects (OECD 2011: 58). As well as giving the beneficiaries a choice about how to use the resources involved, compared to services they are unlikely to generate large distortions in the economy (Barrientos and DeJong 2004). Of course, services have the advantage of ensuring that access to the desired good is consumed and when provided and/or resourced through public means, they ensure that a service is available.

Another key consideration is whether transfers and services should be made available on a universal or targeted basis. It has been suggested that universal provision receives support from a larger range of constituencies as compared with means-tested or targeted provision and that the amount of support typically provided through universal provision is consequently larger (Letablier et al. 2009: 12). On the other hand, arguments for targeted programmes include fairness and equity.

Policies favour different political interests

Child-related transfers and ECEC – along with other relevant areas of policy – carry many political implications and should be seen as political. They have strong moral connotations, for example, and also carry significant implications for resource distribution. They also impact on and are often initiated in the interests of the particular sections of society that have power and influence. It is always helpful to consider carefully the political and moral undertones and implications of these and other policies, especially in the context of reform.

Both child-related financial transfers and ECEC are needed – a cash and care approach seems ideal

Child-related financial transfers and ECEC generally meet different needs on the part of individuals and families, one for income support and the other for service-related inputs. Given this, they should not be seen as alternatives. However, they also share objectives and for this and other reasons the links between them need to be carefully considered, especially in relation to income adequacy. For example, the potential for financial transfers to help with the costs of ECEC should be considered – especially where these are

high – but the high costs of ECEC should be addressed in their own right as well. It needs to be borne in mind that one of the origins of child-related financial transfers in high-income countries was to support the up-bringing of children rather than specifically to pay for ECEC.

Children’s welfare and well-being should be a core consideration

The approach taken to children and whether they are seen and treated as subjects or objects is also crucial. While this may appear self-evident, the complexity of policy plus its ‘blind spots’ can result in a situation where children are not a core consideration in measures designed to benefit them. Children’s well-being and agency need to be to the fore.

The aim should be continuous support across the life cycle

It has been suggested that continuity and complementarity of support, without gaps in the childhood period, are important in achieving a combination of positive outcomes (Thévenon, in Letablier et al. 2009: 34). This and other research (OECD 2013) reports a better set of outcomes in countries where support is more comprehensive. One of the core underlying points is that the effects of different measures depend on complementarity – that is, the effect of each measure depends on the presence of a set of others. The challenge is thus to design measures in a way that produces positive outcomes for all aspects simultaneously.

Gender equality should be a core consideration and needs to be targeted specifically

There are many versions of gender equality policy now in operation. Central to many of these is increasing female labour market participation. It has to be pointed out that this is not equivalent to gender equality and is inadequate as an equality strategy, not least because labour markets in many parts of the world fail to integrate people (and women especially) on an adequate, fair and equitable basis.

The review has consistently shown that child-related transfers and services have a major import for and impact on women and on gender inequality.

Throughout their history and still today, benefits and services for children tread a fine line between giving women extra resources and confirming them in a domestic role (and thereby adding significantly to their responsibilities). And yet gender inequalities and differences are not foregrounded in the design and implementation of many measures (with some exceptions and cross-national variations). Gender equality should be a frontline consideration in this (as in other) policy domains as should the impact on women’s and men’s agency and relations of inequality. Principles of gender equality should be built into the design of programmes and all measures need to be ‘proofed’ for their impact on gender inequality, both at the time of design and at regular intervals during implementation.

Measures targeting different types of inequality are needed and they should be conceived in a virtuous – plus, plus, plus – relationship

There are other lines of potential division associated with these transfers and services apart from gender. It is evident from the analysis undertaken that some provisions run the risk of being regressive. This is especially the case with ECEC, which in some countries tends to be most used by higher-income families. Measures are needed in the design and operation of ECEC to raise take-up among low-income groups and indeed to target this sector for take-up. Indicators of inclusiveness and equity identified by a recent study that would aid in this regard are: a comprehensive early childhood development and promotion strategy, backed up with a legal right to such education; universal enrolment of children in at least a year of preschool at ages 5 or 6, with nearly universal enrolment between the ages of 3 and 5 years; subsidies to ensure access for underprivileged families and measures to ensure that the cost of such care is affordable relative to average wages; and strong parental involvement and outreach (Economist Intelligence Unit 2012). An intersectional approach to inequalities – which recognizes the inter-connections between divisions associated with gender, generation, social class and ethnicity (among others) – would not only help to avoid undesirable trade-offs but also reduce instrumentalism and short-term thinking.

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