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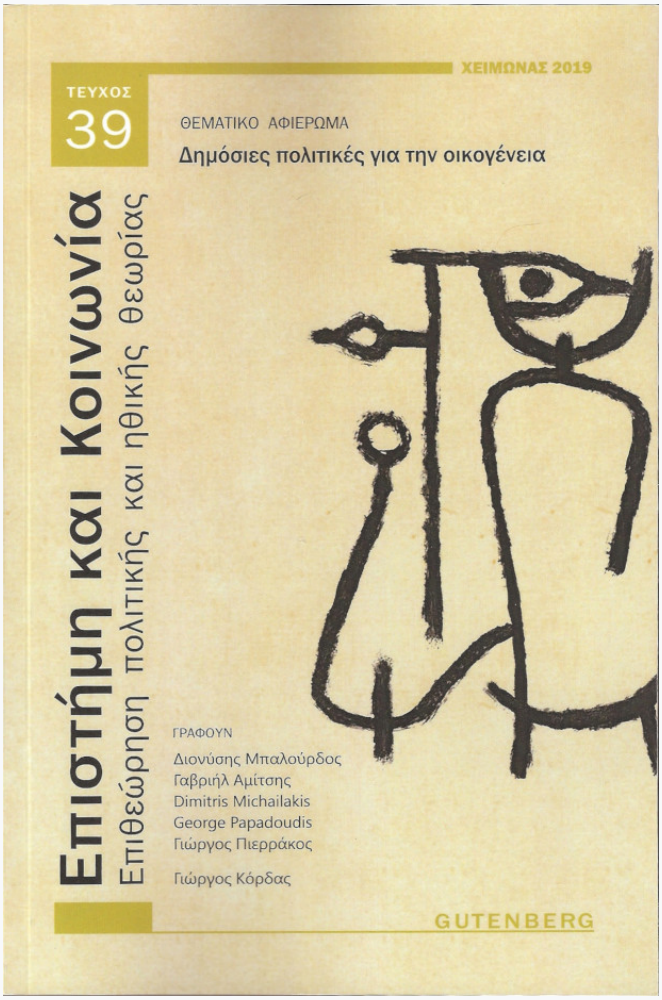

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SWEDISH FAMILY POLICY – FACTS AND PROSPECTS

Since the 1970s, Sweden has developed several foundational welfare policies that have helped to encourage equality. Family policy is based on the dual-earner family and asserts the same rights and obligations regarding family and labour market work for both partners. Sweden was the first country to introduce paid parental leave also to fathers in 1974. Swedish family policies encourage both parents to work and share the upbringing of children. Parents receive a generous parental leave package, have flexible employment choices, and a relatively low gender wage gap, while children have high quality childcare and other services, and a substantial child benefit program. A brief review of the Swedish welfare state is discussed in parallel with critical appraisals of family policies.

Introduction

IT IS ARGUED that there is a strong relationship between the family policy that has been pursued by different governments in Sweden and the structural changes that have taken place in the

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society. Thus, the fact that over a long period Sweden has had the highest birth rate in the EU needs to be reconsidered in light of two key factors: (1) the socio-economic characteristics of the country and (2) the institution of a family policy which since its introduction has been gradually improved and modernized.

The article is structured in two sections. Section A starts with a presentation of the structural characteristics that underpin the Swedish welfare state and continues with a presentation of the foundation of its family policy. Thereafter, the relationship between economic recession and decreased fertility rates in the early 1990s is discussed. Section B presents the family policy reforms instituted by the welfare state in order to meet the structural demands of the Swedish society. The article ends with some general observations on the course and the future of the welfare state and family policy.

A brief review of the Swedish welfare state

The period between the mid-1930s and the mid-1970s was a time of major reforms in most areas of society that changed the life conditions for a majority of the Swedish population. The research terms used to describe these changes are 'the strong state' or 'the Swedish model'.[1] These years, from the mid-1930s to the mid-1970s, are usually regarded as the establishment phase of the Swedish welfare state. In the political rhetoric the values of solidarity, universalism and equal treatment of all citizens were emphasized and used as a keystone in the building of a modernized Swedish society. The previous need-testing policy —aiming at provision of some relief for the impoverished— was put

1. The concept 'Swedish model' refers to the political goal to modernize society through a renewal of labour market relations, the management of economic swings, reduced social inequalities, new family policy and equality in gender relations (Lundqvist 2011).

aside in favour of a general welfare policy. From the late 1950s and early 1960s, social insurance was supplemented by income-related benefits. In the development of the Swedish welfare state pensions, health insurance and unemployment received initially most of the attention (Davidson 1989, Flora & Heidenheimer 1984, Heckscher 1984). In subsequent years the welfare provisions were extended, improved and modified.

Before proceeding further, one must pay attention to the very important concept of welfare state. Esping-Andersen (1990) points out that the different shades and demarcations of this crucial concept have not been well defined. Its most characteristic features are thus delineated in the following paragraphs. The common understanding is that welfare state refers to a state which assumes responsibility for ensuring the welfare of all citizens. In a welfare state services are either partially tax-subsidized or entirely tax-funded, and the transfers provided by the state, county council and municipality ensure the means to provide for the individual's well-being in childhood, illness, unemployment, disability and old age. There is something called general welfare, which means that almost everybody in society is guaranteed a certain level of basic welfare services such as protection, security, food, healthcare and education. Selective welfare, on the other hand, means that such services are only for certain groups of people (ibid.).

During their expansion period from the mid-1930s to mid-1970s, welfare states of the Scandinavian type give public duties practically unlimited space since welfare distribution is not handed over to the family or to the market. All citizens have a right to a decent standard of living and citizenship rights should be guaranteed unconditionally (Esping-Andersen & Korpi 1987).

The Swedish welfare state —a distinct social democratic achievement— emphasizes full employment, economic and gender equality (later coined 'gender-equal family'), and universal access to benefits and services (Esping-Andersen 1990). This type of welfare state, according to Esping-Andersen & Korpi (1987), has three central features: 1) the ideology of equality permits

the establishment of civil society more than in other countries; 2) citizens have legal rights to a wide range of services and benefits; 3) the enactment of legislation is guided by the principle of solidarity and is general.[2]

Esping-Andersen and Korpi (1987) suggest that welfare states can be distinguished by using three dimensions. The first dimension concerns the extent to which needs are being satisfied through the labour market, or through entitlements and rights equal for all. In the latter case an individual's life situation becomes independent of her own participation and of the fluctuations in the labour market. While in the economic sphere inequality is the default case, in politics equality can be ensured.[3] The second dimension concerns the scope of human needs that are supposed to be satisfied by social policy. The third dimension concerns mechanisms to promote social solidarity and universalism. With the help of these three dimensions it is possible, Esping-Andersen and Korpi argue, to determine how far a welfare state has been institutionalized, i.e. how strong or weak a welfare state is.

However, a welfare state cannot occur anywhere and at any time. This is important to be noted by those who aspire implanting the Scandinavian welfare state in their countries. Certain structural conditions must be available. These conditions are: (1) robust state finances safeguarded by high taxation rates, which in turn presupposes the inclusion of almost the entire

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2. A social benefit is considered as general if it is provided to all citizens without direct economic need assessment, or it is selective when it is provided to a clearly demarcated group of citizens after a need assessment is made. The criterion for this assessment is the individual's individual payment ability. Public support is to be given only to the 'really needy'. (Rothstein 2006: 27). A general welfare policy implies a very comprehensive political commitment, symbolized in the expression 'from the cradle to the grave'. (ibid., p. 39)

3. When the provision of welfare is ensured through political mechanisms, welfare services tend to be decommodified, since citizenship and needs are sufficient conditions for the allocation of welfare benefits.

population in the labour market; (2) the value of solidarity is held in high esteem; (3) in order to ensure the consolidation of the value of solidarity, a socialisation process of the citizen as taxpayer, instilling the notion that rights must be congruent with obligations. Flaws in socialization will cause abuse of benefits with detrimental effects for the whole edifice in the long run (Rothstein 1996). In this sense solidarity preconditions the other requirements. Since the emergence of the welfare state solidarity became a central value in Swedish society and is one of the cornerstones not only in social policy, but also in the Swedish welfare state's self-description (Michailakis & Schirmer 2011). With regard to welfare funding through taxes, the concept of solidarity implies that taxpayers contribute to welfare costs relative to their ability to pay, while all —regardless of income— are entitled to the same welfare services. This reasoning entails that the needs of the weakest groups and those with the greatest need should be taken into particular account. The Swedish welfare society ascribes great value to the welfare of all, but especially to those groups in society that are considered as weak and vulnerable (Reich & Michailakis 2005). Therefore, the redistribution of resources is most in favour of disadvantaged individuals.

A well-functioning economy is, as has been stated, a prerequisite for the general welfare. But the proponents of the welfare state argue that the reverse is also true. Namely, a well-functioning welfare state is one of several preconditions for a well-functioning labour market, i.e. a labour market that favours investments. Other conditions for a well-functioning economy are, for example, public spending by the state and the general population's capacity to consume.

There was a widespread optimism concerning to what extent society could be managed and planned. There was a strong belief that political reforms could solve social problems through targeted interventions – so-called social engineering. The favourable economic climate of the time contributed to the optimism with an increase of 4 per cent in GDP between 1950 and 1974, while real wages doubled, and consumption increased

(Schön 2000). In retrospect, it is clear that the ambitious welfare state was built upon full employment, high economic growth, low inflation and improved economic and social conditions for all its citizens. In order to support these ambitions, dynamic economic policies were launched and the period from the end of the Second World War until the mid-1960s was characterized in several respects by a boldly formulated economic-policy model, with associated labour and social policy reform programmes that fundamentally changed Sweden (Edebalk, Swärd & Wadensjö 2013). In the subsequent section, the formation of family policy will be described, since it constitutes a key social reform in the aspiration to build a strong welfare state.

The formation of family policy

Family policy in Sweden rests upon three pillars: (1) Women entering the labour market, preferably full time, as equal work force with men; (2) The organisation and expansion of a public child care with professional caregivers; (3) Taxation based on the earnings of individuals, irrespective of marital status. These are the fundaments for the development of a quite unique family policy that developed from the early 1970s and onwards and whose main goal was to find ways to enable women to reconcile productive and reproductive roles, and later to enable men to reconcile productive roles with child-rearing.

One structural change that facilitated and supported the aforementioned three political reforms of a new family policy was the gradual de-industrialization and emergence of an economy dependent on the service sector. Economic and political changes are —as always— interlinked, meaning that the structural changes in the Swedish economy triggered a transformation of society with respect to patterns of education, career and gender roles. New career patterns for women are commonly regarded as positively correlated with economic transformation (Roman & Peterson 2011).

Another structural change was the introduction in the middle of the 1960s of the student loan system (with the state as the lender and with favourable conditions concerning repayment and interest rates), which opened up higher education for all groups. Women responded to the new socio-economic realities by increasingly choosing education and moving into new sectors and occupations, and postponing motherhood as a consequence. Their presence at the universities and in high-earning occupations as well as in typical male occupations slowly but steadily increased. From the mid-1960s the number of female students in higher education increased considerably, as did the female participation in the labour market.

A third factor present in the early 1970s was the introduction of several reforms designed to stimulate the participation of women in the labour market. The most successful, as already mentioned, was the introduction of separate taxation between husband and wife. The previous taxation system —with its separate tax scales for married and unmarried persons— was a significant impediment for women's labour force participation since there were no economic incentives for working once they were married. The system favoured a one-earner household (Stanfors 2003, Duvander & Ferrarini 2013, Trägardh 2007). With this change in the taxation system it became unfavourable, from the economic point of view, for the household to have only one income.

It was mentioned above that the quest for equality is a key aspect to an analysis of family policy in Sweden. The core objective of all policies that has been pursued over time is a society, and not least a labour market, for both women and men on equal terms. Statistics confirm that the result of the policy was increased equality. By the early-1990s, women constituted 48 per cent of the Swedish labour force, which is the highest percentage anywhere in the world at that time. By the beginning of the 20th century women accounted for around 30 per cent of the work force and in the early 1970s for around 40 per cent. Women currently make up 74 per cent of public sector

workers.[4] This is not the end result of structural changes in the Swedish economy. It is the result of a combination of both economic and political factors.

A significant political reason for the strive towards equalization of outcomes is the successful claims-making by the women's movement. During the 1970s and 1980s the women's movement grew stronger, in Sweden as in other European countries, and this strongly influenced party politics, especially those of the Social Democratic party. The development of women-friendly reforms in the Scandinavian welfare states can be explained by the interaction between women's social and economic rights driven forward by the structural changes in economy, as described above, and women's political struggle towards inclusion in all social systems on equal terms as men. As a result of the combination of these two processes women have, as a collective, been able to exercise decisive influence over the political development (Hernes 1987).

As a logical consequence, the objective of gender equality not only redefined women's roles, but also men's roles. This is visible in child-rearing where responsibilities have been shared almost equally. But gender relations changed dramatically not only within the family, but also within the labour market. Family relations and labour market relations are closely interlinked and have visible and almost immediate effects. Women's economic independence and their indispensable place in the labour market has strengthened their negotiation position within the household. In addition, the gender division of labour —although signs of segregation still exist— has been reduced (Stanfors 2003).

Since the process towards equality is conditioned by structural factors such as the strength of the economy, there is a no-

4. This is although it is a sector with a female majority anyhow, since most of the occupations in the public sector are made up of what traditionally has been held female works e.g. carer, teacher, nurses and so on (Earles 2011, Lundqvist 2013).

ticeable difference when the economic situation in the country does not support the political goal to increased equality. This interplay between economy and gender equality is also visible with respect to fertility rates.

Recession and decreased fertility rates

During the 1990s the Swedish economy entered into a deep recession. One of its consequences was that unemployment among young persons rose to unprecedented levels. As a response to that situation many of the unemployed went to higher education in order to increase their chances of employment. Being unemployed or a student are two social conditions that are not easily combined with child-rearing. Due to lack of stable income both men and women postponed having children until they achieved a stable income (Hoem 2000, Duvander and Olsson 2001, Andersson 2005). During this time both women and men, but especially women, stressed strongly that job must come before children. Economic independence was seen as a precondition for family building. As confirmed by the Swedish statistical office, the decrease in fertility during the 1990s was an effect of more women staying longer in education (Stanfors 2003). It must also be noted that the recession led to austerity measures with, among other effects, job losses in the female-dominated public sector (e.g. pre-school teachers, paramedics). As a result of these comprehensive reductions of social services, fertility decreased from 2.1 babies per woman to 1.5 by 1999 (Lundqvist 2011, Ds 2001:57). The years before the recession Sweden had one of Europe's highest levels of fertility, while during the late 1990s the fertility rate fell to the lowest level since the interwar years (the lowest number of births since 1935 occurred in 1999).

1990s: Freedom of choice – more welfare society less welfare state

The earner-carer orientation of policy which was gradually strengthened from the beginning of the 1970s through several major family-policy reforms faced serious financial problems during the decade of recession, i.e. from the early 1990s onwards (Zofie Duvander and Ferrarini 2013). Against this background, when the liberal parties seized power they opened up for a profit-making childcare option. Although the Social Democrats have always argued against this system, they did not change it when they returned to power in 1994. From then onwards, privately organised (but publicly regulated and financed) childcare has become ever more common (Nyberg 2004).

The provision of care and services to the citizens has mainly been the responsibility of the municipalities. Initially the sole performers were the municipalities and the state. Since the 1990s other actors —both non-profit organizations and for-profit companies— have emerged, providing care, education and services. The liberal government (1991-94) had privatization of public service production as one of its main solutions to address the problems it identified in the public sector – the so called 'revolution of free choice' (Rothstein 2006). The liberal politicians counterposed the 'rigidity of welfare services' to 'freedom to choose', and introduced a voucher system in schools and hospitals (Lundqvist 2011). This political decision has changed the landscape of service providers at the local level during a rather short time and, in principle —or rather, formally— given the users/clients the power to decide who the service provider should be (Johansson, Kassman, Scaramuzzino 2011). For-profit organisations were considered as important and in fact indispensable actors in the development of a service sector of high standards. The argument from politicians was that Sweden needed more for-profit organizations to become more of a 'welfare society' and less of a 'welfare state'.

The for-profit sector would become an equal party to the public. These changes clearly illustrate the ideological shift in Swedish welfare policy, from a welfare state to a welfare society, i.e. from a system where the public sector is a provider, to a system where the public sector is one among others (private and for-profit) who can meet the needs of citizens (Proposition [Government Bill]. 2009/10:55; prop. 2008/09:29).

Part II. An overview of the regulations in the Swedish family policy

This part will outline the family policy reforms that support the self-description of Sweden as a champion of gender equality. Swedish parental insurance is the keystone in the family policy. Parental insurance composes one part of the social security system. The compensation is paid for a total of 480 days for a child being born to the parent staying at home. (Parents of twins receive total compensation for 660 days.) For the 390 days out of 480, the insurance covers 80 percent of the salary, while for the remaining 90 days a fixed amount that is lower, but equal to all parents irrespective of income, is being paid. This corresponds to 13 months of compensation according to the declared annual income and to 3 months according to the fixed amount.

The right to parental leave applies to both parents. Under the current rules the father has the right to use half the paternity leave period. However, days can be transferred to the mother. Because of a tendency to transfer the whole amount to the mothers (at least in some groups), 3 months out of 16 are not transferable. There is a ceiling on the level of compensation provided by the security system. For parents with high wages, parental insurance is less favorable than for those with lower wages. The compensation to the parent per day is, however, higher than for sickness benefits (the maximum is currently around 3868 euros per month). There is also a threshold paid to those who are not insured or have very low incomes.

Parental insurance has been reformed repeatedly, for instance when the number of leave days increased in 1995 and 2002. Parental insurance has also become more flexible. It is possible to adjust the parental leave so that days can be taken out in a different extent (for a whole day, three quarters, half a day, etc.). The right to parental leave is not restricted to the first 16 months of a newborn child, but during several years, currently until the child is 12 years old (previously the age limit was 8 years old). Parents can thus combine working life with parenting (e.g. participating in activities in kindergarten or school).

It has also created incentives for fathers to take parental leave in order to be at home with their children. This was obtained by reserving a certain amount of days exclusively for the father. Another facilitating measure is that an employee on parental leave is entitled to return to the same job. The employee on parental leave is also entitled to receive salary increment following the general salary development, i.e. the employee should have the salary increment which is decided in central agreement. Labour law does not create obstacles in the careers of parents. All these regulations contribute to the increase in birth rates (Social Insurance Report 2008:15). The Swedish family policy enables parents to combine professional life, parenthood and child-rearing.[5]

Concluding remarks

It is well documented that fertility patterns are strongly correlated to structural changes in the economy and to gender roles. Through a series of political measures such as tax reforms, ex-

5. From the Swedish experience there are several measures to be taken in a direction that allows career and family life, foremost a paid parental leave, parents' right to part-time occupation, a working environment where parenting is considered positive, and professional child-care. In countries where such preconditions arelacking or arerudimentary, childbirth is very low (Ds 2001: 57).

pansion of day-care centres and preschools, accompanied by the ideology of gender equality, it became possible to successfully combine double roles for men and women – the roles of family and of career. It is worth noticing that the political positions on gender equality policy only slightly differ between different political parties.

Sweden's birth rate has been the result of a long-standing development that goes hand in hand with a development of structures and values that make it possible to have children, to engage actively in the child's upbringing without interrupting professional development and career prospects. As far as gender equality is concerned, it is still true that fathers use parental leave less than mothers, and this is partly due to the higher income level of men. This is true for most professions (although the gap is decreasing). The loss to the family economy is lower when the mother is at home and the father is working. In this respect, it is no surprise that parents within prestigious professions (e.g. doctors, university professors) share parental insurance days equally, as wage levels do not differ significantly. In addition, it is considered as a positive value in many of these workplaces, for instance at universities, that men take parental leave during the first year, since this is interpreted as signal underscoring his belief in equality between the sexes, which in turn derives in his assessment a good team-worker and colleague.

An important prerequisite for starting a family is an optimistic assessment of the future and the possibilities it harbors. The relationship between socio-economic factors and birth rate can be observed in Sweden before, during, and after the crisis of the 1990s which among other things resulted in high interest rates and a stagnant wage trend, and political measures which implied severe fiscal constraints and austerity. Official statistics show that during this period of economic crisis youth migration increased, more people left in order to study or work in other European countries, while more young people chose to study as a way to secure a job in the labour market, thus postponing starting a family. The statistics in terms of popu-

lation growth show, as has been pointed out above, that at the end of the 1990s unusually few children were born, but since 2000, the birth rates have increased gradually.

One of the core prerequisites for a general welfare policy is a relatively high taxation level for the obvious reason that all citizens receive subsidized services and benefits. Another prerequisite is the value of solidarity being held in high esteem in practice by the majority of citizens. No system is perfect and there will always be a certain amount of fraud and abuse. If the abuse of benefits and grants reach above a certain limit and on a systematic basis (approximately more than 5 per cent of the beneficiaries), this solidarity is exposed to difficult trials. Paying one's taxes and solidarity with the values of right/obligations are necessary for the maintenance and reproduction of a welfare system. It has been noticed by political scientists and politicians that a pessimism regarding the possibility of steering the social development by means of political interventions is gaining ground since the late 1980s. This pessimism applies not least to the provision of welfare services since one of the core prerequisites is the full employment which cannot be upheld. A weakened civic spirit is becoming a reality even in Sweden. During the last three decades a clear re-orientation regarding core values embraced by the Swedish population can be noticed; from collectivism to individualism (Rothstein 2006).

During the golden decades, political interventions and structural particularities of the Swedish society resulted in the formation of a particular self-description as a welfare state worthy of admiration (Esping-Andersen 1990). This self-description, still alive despite radical changes since 1990s, created and continuously reproduced specific expectations that the welfare state must fulfill in order maintain the confidence of the citizens. The Social Democratic goal —that has formed the Swedish welfare state— is that no one should be excluded from social benefits and of participation on equal terms. This ambitious political self-description has fostered enormous expectations among Swedish citizens that are difficult to accommodate in the light

of de-industrialisation, globalisation and migration (Schirmer & Michailakis 2011).

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