

Time, Space, and Ties. Multi-Dimensional Contextual Influence on Older Europeans' Participation in Employment and Family Caregiving

Project Outline

Zukunftskolleg Postdoctoral Fellowship

Dr. Ariane Bertogg

Universität Konstanz

Fachbereich Geschichte, Soziologie, Sportwissenschaft und empirische Bildungsforschung

Universitätsstraße 10

Postfach 26

78464 Konstanz

ariane.bertogg@uni-konstanz.de

Research Gaps, Theoretical Considerations and Research Questions

Against the background of rising life expectations and welfare budget retrenchments, the societal participation of older people is gaining political and societal importance. Today, a large share of men and women aged 50 years or older is engaged in one or several productive – paid or unpaid – activities, such as employment, volunteering, informal elder or grandchild care. Nevertheless, despite an increase in female labour market participation and egalitarian values in most western societies, we can observe considerable gender differences in activity patterns and the reconciliation of employment and family caregiving, with unequal consequences for economic, physical and emotional well-being later in life (e.g., Lilly et al., 2010; Wagner and Brandt, 2018; Pinquart and Sorensen, 2003). Micro-level theories focusing on the division of labour within households or adhering to gender roles often only partly suffice to explain the patterns found (Hank, 2007; Henz, 2010; Luppi and Nazio, 2019).

Previous research has shown that family structures – including the number and gender of children, siblings and parents, the living distances to and contact frequencies with, and the employment and partnership situations of these persons (e.g., Leopold et al., 2014; Luppi and Nazio, 2019; Moen et al. 2005; Schmid et al., 2011) – matter for the take-up of caregiving and exit from the labour market. However, many studies have analysed the linkages between family characteristics and either of these activities in an isolated way rather than looking at interdependencies. Hence, the causal direction of the linkages between the decisions taken with regard to caregiving and labour market participation remains unclear (for a discussion, see Moussa, 2019; Ciccarelli and Soest, 2018). Moreover, numerous comparative studies (e.g., Denaeghel et al., 2011; Leopold and Skopek, 2014; Brandt et al., 2009; Ciccarelli and Soest, 2018; Igel and Szydlik, 2011) indicate that the effect sizes of these linkages vary strongly between European countries. Common theoretical explanations for these disparities refer to welfare policy and cultural characteristics (Leopold and Skopek, 2014), respectively a mix of both. Nevertheless, these assumptions have only rarely been tested employing theory-driven hypotheses at the contextual level. Besides, there exists considerable within-country variation (Jappens and van Bavel, 2012; Wagner and Brandt, 2018).

The proposed project thus addresses the following two research questions: (1) What contextual dimensions influence men's and women's engagement in family caregiving and employment in their second half of life? (2) How does the influence of different contextual dimensions interact? Following the cumulative life course framework (Dannefer, 2003; Spini et al., 2013), I argue that these decisions are not only interdependent, but also highly context sensitive. The influence of social contexts may take place in various dimensions and at different aggregation levels. For the planned project, I focus on three dimensions identified in previous theoretical contributions, namely: *time* (i.e., path-dependencies of individuals life

courses), *space* (i.e., the political and cultural context of the society) and *ties* (i.e., the broader family network).

With regard to *time*, we look at intra-individual variation over time. Life course decisions, transitions, integration chances and exclusion risks (or “vulnerabilities”, see Spini et al., 2013) are path dependent. Particularly, labour market participation of older women is strongly depending on their earlier employment trajectories (Bennett and Möhring, 2015) and influences their availability to engage in unpaid activities. With regard to *space*, both the political and cultural particularities of the society within a person lives is relevant for decisions and their outcomes. Welfare states structure life courses, insofar as they create incentives, generate opportunities and barriers (Engelhardt, 2012). Particular policies with regard to retirement and elder/child-care can create needs for unpaid family work (Schmid et al., 2011) or incentives for staying in the labour market (Ebbinghaus and Hofäcker, 2013). Moreover, they can enable the reconciliation of employment with family caregiving or promote gender-specific specialization patterns (Bettio and Plantenga, 2004; Bertogg and Strauß, 2018). With regard to *ties*, gender inequalities in employment participation and caregiving are the consequences of negotiations taking place within larger family networks that stretch beyond household or generational borders. With hindsight to the importance of intergenerational support in the “beanpole family” (Bengtson, 2001) and the idea of “linked lives”, as well as drawing on very recent demographic studies (Patterson and Margolis, 2019; Luppi and Nazio, 2019), it is plausible to expand the realm of decision making beyond the couple household.

These three dimensions and layers of contextual influence are not independent of each other. Path-dependencies in the life course have implications for the family structure a person is embedded in, e.g., when the availability of a family caregiver enables other family members to pursue a career or motivates fertility decisions among the next generation. Furthermore, policy contexts structure opportunities for life course trajectories (Engelhardt, 2012), whereas the normative context shapes both the options for life course decisions and their consequences (Preisner et al., 2019).

Work Packages

The cumulative life course approach offers a broad range of applications, including poverty, social networks, or well-being. With hindsight to the limited project duration and for the purpose of feasibility (see timetable at the end of this section), I focus on the reconciliation of employment and two types family caregiving (informal elder care and grandchild care) throughout the entire project phase. The project encompasses four work packages, with the first three being designed to investigate one of the contextual dimensions each. The fourth work package constitutes the development and writing of a research grant.

WP 1: Life Course Trajectories and the Reconciliation of Care and Employment

The first work package addresses the dimension of „time“. Here, I am interested in how employment trajectories influence later decisions with regard to reconciling work and care. Current research on reconciling employment and care suggests that these linkages are highly endogenous, and causality is bi-directional (see Moussa, 2019). Hence, previous employment affects caregiving decisions and the effect of caregiving on labour market participation. Here, the analysis takes two steps. I assume that individuals whose employment trajectory exhibits several gaps are (a) more likely to engage in unpaid family caregiving and (b) to leave the labour market because of caregiving duties. Moreover, I assume the role of employment trajectories on these two decisions is stronger for women than for men, as most men aged 50 years or older have had relatively stable careers and there should be relatively little variance among men. To test these hypotheses, I draw on data from the Survey of Health, Ageing and Retirement (SHARE). Its two rounds of retrospective data collection allow identifying typical trajectories, e.g. by means of sequence analysis, and use these trajectories as main explanatory variable. Event History models with the “at risk”-population as the sample will be estimated to analyse the take-up of care and labour market exit once one starts caring.

WP 2: Family Structures and the Intra- and Intergenerational Division of Labour

The second work package addresses the dimension of „ties“. Drawing on the example of grandchild care, it investigates the influence of family structures on (a) the provision of (intensive) grandchild care, and (b) the combination of paid and unpaid activities. Hereby, we make use of the multilevel structure of the SHARE data, where detailed information on partnership, parenthood, education, living distances, contact and employment of up to four children are available for each respondent. The unit of observation is thus the parent-child-relationship. As an innovative approach, I employ an intergenerational comparison of (economic) resources between parent and child, such as education, partnership status and employment, as the main explanatory variable.

WP 3: Perceptions and policies: Cultural and welfare state influence

In the third work package, the focus lies on the „space“ dimension. Space is here represented by (national) welfare policies in the domain of pensions, childcare and elder care, women’s access to the labour market, as well as regional norms about gender roles, caregiving and family duties (Jappens and van Bavel, 2012). This work package essentially builds WP1 and WP2. It investigates whether the influence of trajectories (i.e., time) and family structure (i.e., ties) varies systematically by spatial contexts and whether such systematic variation can be explained by reference to policy or cultural factors. It is plausible to assume that the influence

of both life-course and family structures are moderated by contextual variation with regard to pension systems (Bennett and Möhring, 2015), the availability and type of childcare (Leopold and Skopek, 2014), elder care policies (Brandt et al., 2009; Bettio and Plantenga, 2004), and women's labour market integration (Hank and Jürges, 2007). Whereas the welfare policy side of the spatial influence is already well-documented, it remains less clear how cultural ideas and normative prescriptions about appropriate activities influence individuals' behaviour. The innovation of this work package lies in operationalizing normative context by use of aggregate survey data (i.e., European Values Study, European Social Survey), theorizing the mechanisms and disentangling normative from policy influence. Here, I can build on previous work (Saile and Bertogg, resubmitted; Preisner et al., 2019)

WP 4: Developing my own research profile

Each of the three work packages outline above is planned to result in a scientific article which shall be submitted to a high-ranked journal. The fourth work package essentially serves to develop my own research profile further. Based on the findings This fourth package will be executed parallel with the handling of the three empirical packages (see timetable below). The result of the fourth package will be the application for a prestigious grant (e.g., Emmy-Noether, ERC Starting Grant), which would allow me to start my own research group as an assistant or associate professor. With regard to its contents, the exact orientation of this grant will be influenced by both the sighting of the state of the literature and the findings from the three empirical work packages. Finally, in order to attain a habilitation or habilitation-equivalent achievements, the planned follow-up project will also include a section on theoretical development.

Timetable

Months:	1-4	5-8	9-12	13-16	17-20	21-24
Literature research	2					
Data preparation	2					
WP1		4				
WP2			2	2		
WP3					2	2,5
WP4			1,5	1,5	1,5	
Dissemination of results			0,5	0,5	0,5	0,5
Final Report						1

Grey fields indicate activity in the respective work package. Metric: person-months.

Contribution, Embedment and Career Outlook

The planned project contributes to the current state of research in several ways. By linking micro-level panel data with macro data, it provides insights into how contextual factors shape interdependencies of life course decisions. It extends on previous research by addressing issues of causality making use of advanced statistical methods (such as Fixed Effects models with time-varying regional or country-level variables, Event History models, Sequence Analysis and matching techniques). It contributes to the application and further development of the theoretical cumulative life course framework and employs innovative empirical approaches. Last but not least, the expected results are of relevance for policymakers.

The contents build on previous work of mine, both from my PhD and my early-Postdoc research (a full list of ongoing projects can be obtained in my CV). With my background in family sociology, labour market research and comparative welfare studies, and my network of cooperation partners from various fields at different European universities, I possess the expertise which is necessary to successfully manage the planned project.

Besides being a natural follow-up of my work at the chair of Prof. Dr. Susanne Strauß, the project has the potential to be integrated into the cluster of excellence „The Politics of Inequality“ with its three core aspects perceptions, participations and policies. As the outline suggests, the main approach of this project is to analyse participation in older age and gender inequalities therein in particular. Analytically, I treat participation in employment and caregiving as decisions which are taken with regard to a multidimensional context. Here, both perceptions and policies come into the equation as well. Whereas perceptions shape the information available to individuals when making decisions, particular social policies with regard to pensions, childcare and elder care can define the costs and benefits decisions' outcomes.

The 2-year postdoctoral fellowship would allow me to advance my career in several ways. First, I could further benefit from the excellent research conditions at the University of Konstanz. Moreover, I am confident that the integration into the Zukunftskolleg with its interdisciplinary nature would be advantageous for my project. Second, the fellowship would provide me with the opportunity gain more experience in working independently and cooperate with relevant researchers both locally and internationally. Finally, the planned would strengthen my own research profile. Particularly, the planned work package for writing a grant application would help me get a critical step ahead on the path to a tenured position in academia.

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