



Peer Review on 'Improving reconciliation of work and long-term care'

24-25 September 2018, Berlin, Germany

Summary report

The Peer Review, which took place in Berlin across 1.5 days, discussed Germany's and participating countries' most recent policy and legislative measures that exist to help reconcile long-term care and work commitments for informal carers. The event was hosted by the German Federal Ministry for Family Affairs, Senior Citizens, Women and Youth, and attended by government representatives and independent experts from Germany, the Czech Republic, Estonia, France, Ireland, Portugal, Slovenia and Romania. The European Commission and the network COFACE Families Europe was also represented at the Peer Review.

In Europe, the bulk of long-term care services is provided by informal carers, often unpaid family members or friends, supporting people of all ages with a wide range of needs arising from disability, illness or other life situations. In addition to its ageing population, European countries face a number of changes within the context of reconciling long-term care and work commitments: increased female participation in the labour market, increased retirement age, changing and fractured family structures and an increase in lone parent families. In addition, women are over-represented amongst caregivers, which has negative implications for female labour market participation. Caregivers also experience considerable financial burdens, social constraints, physical and mental ill-health as well as economic implications linked to decreased work activity.

On EU level, as one of the deliverables of the [European Pillar for Social Rights](#), the European Commission [proposed a new directive](#) on work-life balance which aims to recognise the rights of informal carers, including rights to five days a year of carers' leave, paid at least at the same level as sick pay and a right to request flexible working arrangements.

In Germany, the Caregiver Leave Act (Pflegezeitgesetz, 2008) and Family Caregiver Leave Act (Familienpflegezeitgesetz, 2012) were further enhanced in 2015 under the Law on better reconciliation of family, work and long-term care (Gesetz zur besseren Vereinbarkeit von Familie, Pflege und Beruf). The legal system in Germany thus consists of three pillars:

- The Carer's Grant. This is provided in the case that one's close family member needs sudden support at short notice. The caregiver is entitled to a wage compensation benefit, limited to ten working days.
- Caregiver Leave. This gives employees the right to complete or partial release from work for up to 6 months to care for a close relative in need of long-term care at home. An interest-free loan is available to cushion the loss of income during this period.
- Family Caregiver Leave. This gives employees the right to partial release from work for up to 24 months, with a minimum commitment to engage in 15 hours work a week. An interest-free loan is also available, as with the Caregiver Leave.

As there is no statutory obligation to report the take up of both Caregiver Leave and Family Caregiver Leave, no official data of the number of people availing of the leave arrangements is available. A survey conducted in 2016 suggested that around 70,000 people had used Caregiver Leave from January 2015 to August 2016. The take up of the interest-free loan to accompany Caregiver Leave or Family Caregiver Leave has been limited: there have been 921 applications and 738 approvals since its introduction in January 2015. The passing of the Family Caregiver Leave Act involved the creation of an Independent advisory board on the reconciliation of work and long-term care (*Unabhängiger Beirat für die Vereinbarkeit von Pflege und Beruf*). This board consists of 21 representatives of the federal states (*Bundesländer*) and the municipalities (*Kommunen*), in addition to welfare organisations, interest groups, senior citizen's organisations, statutory and private long-term care insurances, trade unions and associations of employers. Its main tasks are to monitor the implementation and efficiency of the regulations, continue further discussion on the topic, and submit a report to the Federal Ministry every four years. The first report is due on 1st June 2019.

Across the EU, there are national differences how long-term care is defined, funded and organised and some countries rely more heavily on informal carers than others. Measures to reconcile work and care also vary in terms of eligibility, length and compensation of leave arrangements as well as flexible work arrangements across different countries. Therefore, this Peer Review compared the legislative and policy situation in Germany with other national measures to reconcile work and care obligations, discussing the following questions:

- 1) What type of leave arrangements can/could help informal carers to balance work and care obligations, including financial support?
- 2) What are successful flexible work arrangements and how can/could employers and social partners be involved to better balance work and care obligations?
- 3) What opportunities can technology offer to help informal carers to balance work and care obligations?

The key messages from the Peer Review can be summarised across three key areas:

Leave arrangements

Across Europe, there are a wide range of leave arrangements for informal carers which vary in terms of who is eligible to avail of them, the length of their duration, if and how much financial support is provided throughout the leave, and the flexibility they offer to the caregiver. In terms of eligibility, there are variations as to who qualifies as a caregiver or care receiver (and of the significance of their relationship) and what qualifies as care. This has both qualitative and quantitative implications for data availability and comparability.

More importantly, the organisation of different long-term care systems across Europe that rely more heavily on families in some countries than others, and the availability, access and quality of formal care services impact hugely on the work-life balance and labour market participation of informal carers.

Regarding the variety of care leave arrangements offered across participating countries, several challenges were identified that impede how they can effectively reconcile competing commitments of work and care. They are outlined below:

- There is a need for cultural change in society and at the workplace via an open dialogue about care and ageing issues, addressing stigma in caring for a relative in need of care. This also relates to gender bias; as women have typically availed of care leave arrangements, it was

anticipated that women will continue to do so at a far higher rate than men unless policies include provisions to counteract these gender-related aspects. As men earn more on average than women, offering greater financial support as part of a care leave arrangement might be a way to meet this potential loss of income when a family member needs to, chooses to or is obliged to perform care commitments.

- From the perspective of policy makers, academics and other relevant actors, more information and data are needed about the take up of care leave. Additionally, some informal carers are not even aware that they perform this role. This presents a significant challenge: if informal carers are unaware that they are carers, they will not avail of services through which they might otherwise be recognised as such. It is often through the administrative data obtained by targeted service provision that estimations are made on caregiver numbers.
- On the local level, non-financial support, such as befriending opportunities, respite care or peer support can support families.
- Financial support is an important factor for informal carers. The fact that many caregivers would not be able to take out a loan, due to financial constraints, was cited as an additional challenge. Paid leave arrangements, mostly short-term across many European countries, might be a way to organise necessary arrangements without reduced income for the employee and a viable solution for the employer.
- However, care is mostly provided long-term for months or years, and its end point is not foreseeable as, for instance, with child care. The need for care is in many cases also sporadic and not linear. Long-term care leave arrangements therefore need to be flexible and consider a long-term need for care.
- Caregivers are at higher risk-of poverty at a later age, due to reduced pension contributions when they are on (extended) carer's leave. To prevent this, it was suggested that pension contributions should be maintained at the same level during carer's leave or a reduction of working hours.

Work arrangements

It transpired that the existence of work arrangements that facilitate the reconciliation of work and care varied widely not only across participating countries, but on the level of the individual employer. Ways to establish or enhance flexible work arrangements for long-term carers, as discussed during the review, are presented below:

- Employers should provide comprehensive information on existing care leave provisions, the type of support available to their employees, and on their rights and entitlements.
- Employers could develop an infrastructure that supports the everyday needs of carers, such as through day-care service provision for working parents, or psychological service provision to deal with the emotional burden of caregiving.
- Ensuring that the work environment is sensitive to the situation and needs of caregivers was seen as crucial. The fact that caregivers might be reluctant to avail of care leave due to the indirect implications for their career trajectory (for leaving full time employment while caring) was reported as a challenge. Helping reform the cultural taboo around caregiving at the workplace was reported as very important. Further, breaking the taboo related to the supposed gendered nature of caregiving was viewed as one way to encourage more men to take up caregiver roles.

- Social partners and other relevant stakeholders, such as non-governmental organisations or municipalities, could be consulted to help negotiate workplace protection schemes for caregivers.

Assistive technology

The Peer Review offered the opportunity to get acquainted with recent developments in the fields of artificial intelligence and robotics, and other assistive technologies to support the provision of long-term and long-distance care¹. These developments were viewed as particularly relevant because, in Germany for instance, 31% of care receivers live alone. Three different types of assistive technology were presented. The first consisted of 'app-based monitoring': this offers an inexpensive and easy-to-handle option, through which caregivers could monitor the situation of their care receiver via remote controlled cameras. The second option consisted of 'telepresence': this offers a way to reduce feelings of social isolation by enabling communication between family members. The third was a 'robotic intervention for mild cognitive impairment': this provides a means to help halt cognitive impairment and instigate a variety of activities. Participants discussed the potential of assistive technology, highlighting the following aspects:

- Benefits of assistive technologies include: the potential ease of caregiver anxiety; the possibility of overcoming distance through immediate communication; the novelty and fun deriving from certain technology; the role of technology in halting cognitive decline; and the ease through which care receivers can contact emergency services, if necessary.
- Several potential obstacles were also identified. These include: ethical concerns around consent, data protection, the need for the care receiver to accept loss of independence and that they will be constantly observed (in the case of 'app-based monitoring'), the reliance on internet connection, high costs in technology implementation and maintenance and the potential likelihood that care receivers will not accept such advanced technology in their daily routines.
- It was agreed amongst participants that while assistive technology can help support care giving duties, it cannot replace the hands-on quality care that is offered by a human: be it a family member, a neighbour or a professional carer.

Conclusions

The range of specific measures that support informal carers can be categorised by those that are direct (supporting and improving informal care provision/delivery) and those that are indirect (improving the context of informal care). Direct measures include leave and flexible working arrangements entitlements, education and training to informal carers to enable that they stay, or can re-enter, the labour market (this could include to formally recognise skills honed through caregiving). They also include providing information to caregivers, care receivers, and employers on the rights of all stakeholders concerned. Indirect measures include increasing financial support and ensuring that carers' rights receive legal recognition.

Overall, the key learning points of this Peer Review can be summarized as such:

¹ Long-distance care refers to informal carers living further away from the family member they have caring responsibility for, on average 724 km. See Host Country Discussion Paper Section by Annette Franke on "Long-distance caregiving".

- Although this Peer Review discussed measures targeted directly towards informal carers, their possibilities to balance work and care obligations depends hugely on national long-term care systems and labour market policies.
- Ageing and care obligations need to be addressed in a wider societal dialogue. This will help to make carers, employers and the wider public aware of existing measures that help to balance work and care, but also to start a dialogue on further improvements.
- A holistic approach to care that considers a range of individual needs of the carer and the person in need of care is necessary. This includes flexible leave arrangements and work arrangements, income support and also emotional support for carers and care receiver, such as help and networking in the community.
- Good practices and potential solutions are showcased by some employers that strive to ensure that work arrangements are flexible: workplace flexibility can be enabled, for instance, by permitting teleworking, 'flexitime' and shift swapping between employees. Showcasing good practices of employers, as well as peer support, might be a way to engage more employers in measures to reconcile work and care obligations of their employees.
- Ensuring the statutory payment of pension and social security contributions was seen as an additional good practice by select social security systems, as well as the possibility to transfer holiday entitlements between colleagues that can be incentivised by legal or collective bargaining regulations.
- As long-distance care giving might increase in many countries, assistive technology has the potential to support people in need of long-term care and their families. In addition, technological progress and increased digital skills may also support an increased use of assistive technology at work and at home. However, this cannot compensate human support and help.