



# Research Projects

Equality and Wellbeing across Generations





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## Background JPI MYBL

The Joint Programming Initiative 'More Years, Better Lives' (JPI MYBL) seeks to enhance coordination and collaboration between European and national research programmes related to demographic change. Areas affected by demographic change cover a wide range of research fields and policy topics ranging from health to social welfare, education & learning, work & productivity to housing, urban & rural development and mobility. JPI MYBL therefore follows a transnational, multi-disciplinary approach bringing together different research programmes and researchers from various disciplines in order to provide solutions for the upcoming challenges and make use of the potential of societal change in Europe.

We are an initiative of currently 17 member states represented by representatives of ministries, funding agencies, civil society and research institutes. Throughout the year we organise workshops at conferences and with partners, attend meetings, collaborate with other institutions, organise expert processes, publish positions and policy papers and support and supervise the projects we are funding in research calls.

## Aim of the joint call

This call aims to support policy in reducing inequality in the face of demographic change. The call seeks research which will improve our understanding of how demographic change is altering the implicit contract between generations and how policy can ensure that change reduces inequality instead of increasing it. Specifically, the call deals with three aspects of inequality:

1. Income and wealth

Extending working life changes the distribution of income and wealth between generations. Income in later life is very unevenly distributed on the basis of previous employment, earnings, and the structure of different pension systems and different patterns of housing tenure. Changes in the costs of social care and the time people spend longer in retirement are affecting patterns of intergenerational inheritance.

2. Caring responsibilities

A high proportion of older people (particularly, but not exclusively women) undertake caring responsibilities for parents, children or partners. Caring can be emotionally rewarding, but can also seriously damage the mental and physical health of the carer, as well as diminish their employment opportunities.

3. Social and political participation

In many countries older people are more likely than young people to participate in formal political processes. However, their interests and concerns may still be underrepresented in political decision making. Older people are also more vulnerable to social isolation and loneliness. Their sense of identity and security can also be challenged as neighbourhoods change, becoming younger, or possibly poorer.

In total **six research projects** are funded with researchers from eleven countries (Austria, Belgium, Canada, Finland, France, Germany, Latvia, Norway, Spain, Sweden and the United Kingdom). Please find the abstracts of the projects on the following pages.

## Abstracts funded projects:

### CAREWELL TF



**Principal investigator:** Prof. Ruth Evans

This innovative comparative research project will investigate the relationships between care, inequalities & wellbeing among different generations of transnational families in the UK, Spain, France & Sweden. The COVID-19 crisis has brought into stark relief the care deficits many European countries are confronting as ageing societies, with low-paid women migrants often filling gaps in formal care provision, while their own caring responsibilities for kin are often overlooked. Demographic shifts due to population ageing & increased international migration are leading to major changes in the provision of care, social protection & intergenerational responsibilities. These transformations may exacerbate existing inequalities facing migrant families with care needs.

The project will compare migrant carers' and transnational families' experiences within four partner countries with contrasting welfare models, migration regimes & post-colonial legacies. Using a multi-sited family-focused ethnographic & participatory action research methodology, we will work with partner organisations to train migrant peer researchers & support them to undertake research with families, building trust & capacity within communities. We will select a diverse sample of 100 transnational families with care needs (25 in each country) of different ethnicities & varying legal status from two contrasting regions in each country to compare experiences at different urban and rural scales, as well as between countries. We will engage with 3 or 4 different generations, including family members living in countries of origin/other settlement countries. We will select 20-30 case study families for in-depth ethnographic research. We aim to match the sample with family members living in more than one partner country to explore onward migration & resource flows & compare differing entitlements to social protection.

The study will provide unique insights into how family care practices are negotiated between & within different generations of transnational families in Europe, while also considering their family ties in countries of origin. This timely project will capture the health, economic, social & emotional impacts of the COVID-19 pandemic on transnational families as the crisis unfolds, including changing intergenerational caring responsibilities & mobility strategies. It will explore the impacts of care on younger, middle & older generations' wellbeing & opportunities & how social reproductive & productive work are shaped by intersecting inequalities of gender, age & generation, disability, race, ethnicity/cultural background & socio-economic & legal status. It will include a specific focus on young caregiving & how this affects children's wellbeing, education & opportunities. This interdisciplinary project will also explore how language barriers may perpetuate inequalities facing transnational carers & how younger generations may provide 'language-brokering' & help older family members to navigate bureaucratic legal & administrative systems to claim their rights.

The project will achieve significant societal impacts by providing a valuable evidence-base to inform policy in improving the wellbeing & equality of transnational families in Europe. It will embed the learning in practice through the co-production of culturally appropriate tools & training materials that support young & adult carers & transnational families. The findings & outputs will be disseminated through community screenings, regional stakeholder workshops, key academic & practitioner conferences & an international interdisciplinary Symposium. The project will produce 14 high impact journal articles in the fields of migration studies, social & emotional geographies, childhood & youth studies, family sociology, sociolinguistics & migrant language education & a co-edited volume. The dataset will be archived for future researchers' use.

## CIVEX

**Principal investigator:** Dr. Rodrigo Serrat



In Europe's ageing societies, being able to age healthily and actively remains a major challenge not only for older people themselves but also for wider society. Moreover, older adults continue to be at risk of social exclusion in key life domains, including material and financial resources, social relations, access to services, community and neighbourhood integration, and civic and cultural participation. While social exclusion in later life represents a major topic for research and policy in Europe and other world regions, significant gaps in knowledge and understanding persist, thereby reducing the potential for evidence-based policy development. A major shortcoming concerns the lack of conceptual development and empirical evidence on older adults' exclusion from multidimensional civic engagement. CIVEX aims to meet this gap by investigating features of exclusion from multidimensional civic engagement in later life and older adults' experiences of such exclusion, and by identifying evidence-based policy responses to address it. It will develop a comprehensive and interdisciplinary research project combining fundamental research and societal impact. The CIVEX consortium includes five European countries selected to represent contrasting welfare state regimes and cultural contexts: Anglo-Saxon (UK), Continental (Belgium), Nordic (Sweden and Finland) and Southern (Spain).

Taking a holistic perspective, the overarching aim of CIVEX is to examine, for the first time, exclusion from multidimensional forms of civic engagement in later life. CIVEX will address five objectives linked to multidimensional civic engagement of a diverse older population: 1) micro-level variables, with a focus on a diversity and intersectionality (gender, socio-economic and ethno-cultural backgrounds); 2) mesolevel variables; and 3) macro-level drivers of exclusion; to understand how neighbourhoods and communities as well as welfare state regimes influence the multidimensional exclusion from civic engagement of a diverse older population; 4) lived experiences of inclusion and exclusion from civic engagement of potentially marginalised groups of older adults, who have been largely overlooked in previous studies; and 5) life-course perspective to assess how conditions earlier in life and at key stages of the adult life course affect individuals' opportunities to participate in multidimensional civic activities later in life. In meeting these scientific objectives, CIVEX will produce a novel and comprehensive theoretical model to conceptualise exclusion from multidimensional civic engagement in later life.

To achieve the objectives, CIVEX will use a mixed-methods innovative convergent parallel design to compare, relate and complement both quantitative and qualitative perspectives. CIVEX also aims to optimise the balance between evidence-based and practice-based handling; ultimately coming to evidence-based practice. For that reason, CIVEX has been developed as a co-production project. Older adults themselves and older people's organisations will play an active and crucial role in CIVEX. Older adults will not only be respondents but also co-researchers, providing an essential "insider perspective" in collecting, analysing, presenting and disseminating the data and also when developing and disseminating evidence-based policy responses. The group of older adults within CIVEX will represent the current composition of European citizens and the five participating countries in CIVEX. Older people's organisations involved will, in turn, act as an advisory board and will work side by side with academic partners to ensure the societal relevance of the research, its translation into effective evidence-based policy recommendations, and its wide dissemination to relevant public audiences. As a result, CIVEX will show how older adults' interests and concerns may be better represented in public decision making.

## EUROCARE

**Principal investigator:** Prof. Anne McMunn



This consortium will investigate inequalities in caring from a life course perspective. Increased longevity gains have not been accompanied by an increasing number of years spent disability free, leading to an increased need for care for older people. European countries vary dramatically in how they have met this rising care demand, but across most of Europe the majority of care is provided informally by families, friends, or neighbours. Smaller family sizes, partnership dissolution and women's strengthening ties to paid work may lead to a diminishing pool of informal carers in the face of increasing need. In addition, delayed childbearing means there are likely to be a growing number of young adults with older parents requiring care, more carers providing care to parents and children simultaneously (sandwich care), as well as a growing number of adult grandchildren caring for surviving grandparents. Moreover, caring is not equally distributed. Women are more likely to provide care, to have provided care for longer and to care more intensively than men, and gender inequality in who provides care is greater in countries that rely on a family-based model. Furthermore, caring itself acts as a form of inequality, limiting access to financial and social resources. Existing evidence suggests that caring leads to labour market exits; reduced working hours, salaries and pension entitlements; loss of training opportunities and career advancement; and is associated with poorer psychological and physical health. However, existing research has largely been based on cross-sectional samples of older-adults or has focussed on care for specific groups, such as dementia sufferers. Additionally, most research on caring has focused on older spouses, or older working age carers, while younger carers are often overlooked in policy and research. Younger caring occurs at a time when young adults are seeking to complete education, establish themselves in the job market and form long-term relationships. Young adult carers are also likely to have fewer financial and socioemotional resources than older carers. We will harness Europe's longitudinal, population data investments, as well as a wealth of both methodological and substantive experience in a multidisciplinary team of leading European academics and non-academic partners to examine inequalities in employment, social participation and health between carers and non-carers at different life stages, as well as the gender, socioeconomic and ethnic differences in the social, economic and health consequences of caring. Comparisons in these life course care inequalities will be made across European country contexts, with a specific focus on young adult carers as well as those providing care in mid- and later-life. Where data allow, the initial impact of changes in informal care related to the COVID-19 pandemic will also be included. Finally, we include a specific research objective and work package focused on working closely with our non-academic partners to translate our results into policy recommendations.

## EQUALCARE

**Principal investigator:** Dr. Miranda Leontowitsch



**Background:** Digitalisation has brought a significant change to perceived and enacted care relationships in terms of distance and proximity between people. Whilst the digital age adds new cultural expectations of care, collaboration and mutuality, it has the potential to perpetuate inequalities between generations, income groups and countries due to available care resources and infrastructure. Living alone raises specific challenges to care work and on and off-line care relationships particularly in contexts, where tension with close or immediate hands-on physical caring, as well as caring responsibilities involving younger generations, arise. Digitalisation has contributed to the connectedness of young and old generations within families as employment opportunities have forced younger generations to leave their hometowns. The Covid-19 pandemic and its accompanying social lockdown has led to a particular increase in the numbers of older people using mobile technologies to stay in touch with family and friends. As people live longer, seek more autonomous living, do not tolerate unsatisfactory family or household relationships, and are obliged for various reasons to live alone either temporarily or on a more permanent basis, living alone has become a central theme to understanding later life. Living alone also necessitates some degree of selfcare. Thus, an aspect of great empirical, policy and societal interest is the relation of (self)care and digital webs of caring work towards and from family members, friends and indeed wider circles of neighbours, acquaintances and those of similar service or mutual co-operation organisations and networks.

**Aim:** EQaulCare aims to further understanding of, and policy development on, the intersections of digitalisation with intergenerational care work and care relationships of older people living alone, and to contribute to reducing inequalities through collaboration and co-design. EQualCare interrogates inequalities by gender, cultural and socio-economic background both between and within countries, with their very different demographics and policy backgrounds.

**Method:** EQualCare is a cross-cultural comparison and collaboration, with Finland and Sweden as two countries advanced in the digitalisation of civic and private life and thus providing a helpful contrast to Germany and Latvia that are at different levels of digitalisation. Following a participatory action research (PAR) approach, EQualCare sets out to recruit older people aged 60+ as co-researchers. These coresearchers will define questions and problems related to the aim of EQualCare and seek out older people living alone in the community to listen to their experiences. There will be two PAR projects per country and co-researchers will be recruited ensuring diversity in terms of gender, socio-economic and cultural background. The model of EQualCare is a participatory policy making one, whereby the work of one PAR project leads to a reduction of social inequality at the local level, but where combined with the work done by other groups leads to changes at a higher (e.g. regional or national) level. With four European countries collaborating, societal outreach of the eight interlinked PAR projects will have supranational impact. In addition, the project will undertake a review of social policy documents and legislation in terms of care-responsibility and digitalisation for each country and analyse existing national and EU data sets (e.g. EU-SILC) to draw comparative information on living conditions, income, health and care work for different age segments in the 60+ age group.

## PENSINEQ

**Principal investigator:** Prof. Antoine Bozio



The main research objective is to document how inequalities in ageing – such as those between the rich and the poor and those between men and women – have changed across successive birth cohorts, and how public policies aiming to strengthen the fiscal sustainability of welfare systems have counteracted or accentuated these trends. This project will rely on data and reforms carried out in five countries

encompassing North America, Western Europe and Scandinavia and carefully chosen to ensure a wide span of institutional arrangements in areas such as labour markets, social security and private pensions: Canada, France, Germany, Sweden and the United Kingdom.

First, we will document recent trends in life-expectancy and healthy ageing inequality. Our overall objective is to bring about a more complete and multi-faceted picture of recent trends in ageing inequalities across countries from North America and Europe. For France and Sweden, we will use administrative data to combine information on income, occupation, residence and death records and construct detailed measures of mortality inequalities, and assess how these have changed across recent cohorts. We will then carry out a cross-country analysis of the income-mortality gradient using recent estimates for Canada, Germany, the UK, and the US. The objective is to exploit crosscountry differences to dig deeper into the factors which could explain variations in inequalities of life expectancy. Using survey data on health at older ages in Europe, and specific surveys for France and Sweden, we will estimate inequalities of healthy ageing by gender and socio-economic background. We will provide estimates of how inequalities of disability-free life-expectancy are changing over time. Using Canadian data, we will estimate how the use of long-term care varies by socio-demographic factors.

Second, we go beyond describing trends in inequalities by looking at the effects that current policies have on redistributive trends. More precisely, we will analyse how pension reforms have contributed to reduce, or increase, these inequalities in ageing, using cases from France, Sweden and the UK. Combining estimates on the income-mortality gradient with careful estimation and simulation of the impact of pension systems, we will estimate redistributive patterns of public old-age provision, and analyse how pension reforms have altered this redistribution. We will distinguish between static analyses and analyses that do allow for behavioural responses, notably changes to retirement patterns. In particular, we will elicit how strategies to extend career length counteract or aggravate inequalities. In addition to public pension reforms, we will consider reforms to private pension provision in the UK, through estimating the distributional impact of autoenrollment of most employees into workplace pensions.

Third, we will study whether, and how, the looming increase in care needs generates additional inequalities for those giving care and for people in need of care. Recent research has highlighted how care needs, formal care take-up and informal care provision are largely influenced by socio-economic background. We will contribute to this body of research by analysing how reforms impact inequalities in care responsibilities in Canada and Germany. In addition, we will analyse how the gender gap in informal care – elderly care is overwhelmingly provided by women – is related to gender inequalities in the labour market and the system of pension provision using European data. Moreover, we will use data from Canada and Germany to estimate models of long-term care use explicitly considering inequalities in socioeconomic background. Finally, we will exploit reforms to the pension and long-term care systems in Germany to assess how likely they are to impact inequalities in informal care provision.





## WELLCARE

**Principal investigator:** Prof. Concepció Paxtot

Economic development in parallel to demographic changes over the past decades have altered family structures and the way care is given and received along the lifecycle. This long-running trend has been recently affected by the Covid-19 pandemic, especially the tragic rates of mortality in too many institutional care settings for the elderly, and the widespread closures of schools. These dramatic changes make more evident how the market economy relies on non-market economic activities to provide welfare in general and care to dependent children and elders. At the same time, it has highlighted just how much the informal care economy relates to inequality in general and exposes the gender gap.

The WELLCARE research proposal will investigate how the welfare state, the market, and the family interact to provide care along the lifecycle and hence, how it affects welfare and inequality at both intra and intergenerational levels. More specifically, WELLCARE first will provide a comprehensive view of the care economy in the following dimensions: Care given and received along the whole life cycle, including both care given to children, disabled and the dependent elderly. The different resource allocation mechanisms available to provide care (market, government and family).

Second, WELLCARE will provide more in-depth understanding of the sources of intra and intergenerational inequality accounting for the role of the care economy by: Exploring and integrating information from existing sample survey and related microdata sets in Europe and Canada to produce a quantified view of the care economy both in financial terms and for measures of informal care provided and received. Based on this empirical analysis, develop the dynamic microsimulation model WELLCARE to simulate and project into the future measures of care both to children and to the elderly provided formally by the market or the government and informally by the family.

We will combine two additional methodologies to compare the interactions among formal and informal care, income and wealth in creating inequality.

1. The macro module of the WELLCARE model will be based on the National Transfer Accounts (NTA) accounting framework. This method gives a comprehensive measure of how resources move across age groups by means of the market, public or private transfers among generations, aligned to System of National Accounts (SNA). The method also measures home production and consumption and hence time transfers (NTTA) to complete the picture of intergenerational resource allocations. We will also depart from the standard method by building NTA-NTTA estimates for heterogeneous groups in order to approach both intra and intergenerational redistribution issues.
2. Additionally, a case study on the UK will be developed to consider the behavioral responses of individuals. More specifically a structural model will be designed to explore how the labor supply and saving decision are altered by the availability of formal care.

WELLCARE puts together an interdisciplinary group of researcher's expertise in the different methodologies involved (developed between EUROMOD, dynamic microsimulation techniques and National Transfer Accounts), continuing the previous symbiosis/synergies and in the WELTRASIM project. The synergies between WELLCARE's researches will improve the existing knowledge on the impact of the welfare state transfers in inequality.

This proposal delineates the necessary management structure to foster the development of this research project and ensure its scientific and societal impact, following a clear dissemination strategy. The coordinator and the Project manager, together with the Steering Committee, will interact with the Advisory Board composed of external stakeholders (academia, the public service, and third pillar (charity) institutions) to exploit and disseminate the research results.