



Creating Formal Employment Relationships in the Domestic Services Sector: Successful Strategies



*Insights from the Project
“Labour Market Measures for Reducing Illegal
Employment in Private Households of the Elderly”*

supported by DG Employment, Social Affairs and Inclusion

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Introductory Words by the Project Partners from the Political Administration

In most European countries domestic services are often provided by third parties. Almost everywhere this is to a large extent done through informal employment. This means that several million women are in precarious employment relationships in private households Europe-wide. So far, discourses in the nation states have paid little attention to the situation – it is often pretended that the problem is not there instead of taking a close look. The time for changes is ripe, because the demand for domestic services is increasing, especially with regard to the growing number of elderly people, who cannot continue living in their own four walls without having access to services supporting their daily life. Change begins with the appearance of the topic in political discourses so that it becomes visible and tangible. Only then appropriate strategies can be taken for developing improved framework conditions for domestic services.

The EU-project “Labour Market Measures for Reducing Illegal Employment in Private Households of the Elderly” gives important impulses for political discourses and derived strategy development. We are proud that we could represent the Social Ministry of Hesse in the project team and gain first-hand insights into the initiation of national, regional and communal discourses on the strategies for developing regular employment relationships in private households in Austria, Italy, Poland and Germany. We hope that the discourses which have started in all countries will retain their dynamic and materialise in successful strategies for the creation of formal employment in private households also in other EU Member States, that were not involved in the project.

The Social Ministry of Hesse will continue fostering discourses on strategy development and intends to set important impulses for developing the sector of domestic services. We envisage developing innovative framework conditions, which do justice to the growing importance of the sector and open private households up as sites for legal and attractive employment for many people. This would enable them to enter the first labour market and use their potential for the elderly, children and other people in need.

We would be delighted if this brochure aroused wide-spread interest.

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Executive Summary

When taking into consideration the demographic and socio-economic trends in most European countries, the demand for domestic services will be increasing in the next decades. This development could be used for creating formal employment opportunities in private households for unskilled and low-skilled labour. However, it is not an easy task since it entails devising a strategy for reducing the high share of informal labour in as well as overcoming the current fragmentation of the domestic services sector. Both on the national and EU level there is a need for policy advice on how to best integrate the diverse but yet interrelated needs and interests of the households, the employees and the firms as providers of domestic services into one coherent strategy. So far, such a comprehensive strategy can be found only in France where the Borloo-Plan systematically integrated measures and tools from all relevant fields of politics. Thus it led to a significant growth of the domestic services sector and a substantial increase of formal employment.

This brochure presents the Generalised Model, a tool for devising a similarly comprehensive and coherent strategy. It was constructed by drawing on the successful French strategy of creating more formal employment relationships through the systematic development of the domestic services sector. The brochure demonstrates how other countries can learn from the French experience by analysing their current situation and using the Generalised Model to create a strategy fitting their specific circumstances. By studying the situations in Germany, Austria, Italy and Poland and considering how to create strategies fitting the different national settings in these countries it is shown how the Generalised Model can put into practice. These case studies were conducted in the EU Project “**Labour Market Instruments for Reducing Illegal Employment in Private Households of the Elderly**”, supported by DG Employment, Social Affairs and Inclusion.

The brochure intends to initiate and stimulate discourses on fostering the creation of formal employment in EU Member States. Therefore, it addresses different stakeholders such as **policy-makers on the national, regional and EU level, representatives of local administrations, providers of domestic services, domestic workers, trade unions or welfare associations, labour administration, placement services as well as providers of education and training.**



Zusammenfassung

Demografische und sozio-ökonomische Trends in den meisten europäischen Ländern legen es nahe, von einem Anstieg der Nachfrage nach haushaltsnahen Dienstleistungen in den nächsten Jahrzehnten auszugehen.

Diese Entwicklung bietet die Chance, formale Beschäftigung für Un- und Angelernte in Privathaushalten deutlich auszuweiten. Gelingen kann dies jedoch nur, wenn der hohe Anteil an illegaler Beschäftigung und Schwarzarbeit im Bereich haushaltsnaher Dienstleistungen reduziert und zudem eine Überwindung der aktuellen Fragmentierung dieses Sektors erreicht werden kann. Sowohl auf der nationalen als auch auf der EU-Ebene besteht daher Bedarf nach Politikberatung, wie die vielfältigen, aber dennoch zusammenhängenden Bedarfe und Interessen der Haushalte, der Beschäftigten und der Firmen als Anbieter von haushaltsnahen Dienstleistungen in einer kohärenten Strategie integriert werden können. Bislang gibt es eine solche umfassende Strategie nur in Frankreich, wo die systematisch integrierten Maßnahmen und Instrumente aus allen relevanten Politikbereichen zu einem bedeutenden Wachstum des Sektors der haushaltsnahen Dienstleistungen und einem beträchtlichen Anstieg formaler Beschäftigung geführt haben.

Die vorliegende Broschüre präsentiert ein Konzept für das Aufstellen einer ähnlich umfassenden Strategie: Das Generalisierte Modell zur Förderung der Entwicklung des Sektors für haushaltsnahe Dienstleistungen und Schaffung formaler Beschäftigungsverhältnisse. Das Modell basiert auf den erfolgreichen französischen Erfahrungen bei der Schaffung einer zusammenhängenden Strategie für den Sektor der haushaltsnahen Dienstleistungen. Die Broschüre zeigt auf, wie andere Länder von den französischen Erfahrungen lernen können, indem sie ihre aktuelle Situation



analysieren und das Generalisierte Modell für die Schaffung einer Strategie benutzen, die ihre nationenspezifischen Verhältnisse berücksichtigt. Die Vorgehensweise wird veranschaulicht durch Fallstudien, die auf der Situationsanalyse in Deutschland, Österreich, Italien und Polen basieren. Diese wurden im Rahmen des EU-Projektes **„Arbeitsmarktpolitische Maßnahmen zu Reduzierung von Schwarzarbeit und illegaler Beschäftigung in Privathaushalten Älterer“** durchgeführt. Unterstützt wurde das Projekt durch DG Beschäftigung, Soziales und Inklusion.

Ziel der Broschüre ist, Diskurse über die Förderung der Entwicklung des Sektors für haushaltsnahe Dienstleistungen in den EU Mitgliedsstaaten anzustoßen und anzuregen. Hierfür spricht sie verschiedene Stakeholder an: **Politische Entscheidungsträger auf der nationalen, regionalen und EU-Ebene, Vertreter der Anbieter von haushaltsnahen Dienstleistungen, der Haushaltshilfen, der Gewerkschaften, der Wohlfahrtsverbände, der Arbeitsverwaltung und -vermittlung sowie der Anbieter von Fort- und Weiterbildungen** in diesem Bereich.

Sintesi del Progetto

Se si considera la tendenza demografica e socioeconomica nella maggior parte dei paesi europei, la domanda di servizi domestici sarà in aumento nei prossimi decenni. Questo trend potrebbe portare alla creazione di opportunità di lavoro regolare nei domicili privati per manodopera scarsamente qualificata o non qualificata. Tuttavia, non si tratta di un compito facile, dato che ciò implicherebbe delineare una strategia per contrastare l'elevata quota di lavoro informale così come l'attuale frammentazione del settore dei servizi domestici. Sia a livello nazionale sia a livello comunitario, sono necessari suggerimenti di policy su come integrare nel miglior modo possibile i diversi ma correlati bisogni ed interessi delle famiglie, degli operai e delle ditte fornitrici dei servizi di cura nel quadro di una strategia coerente. Finora, una strategia di questo tipo si può trovare solamente in Francia, dove il Piano Borloo ha integrato sistematicamente misure e strumenti da tutti i settori politici rilevanti e ha portato ad una significativa crescita del settore dei servizi domestici.



Questa brochure presenta uno strumento per sviluppare una strategia simile a quella francese: il Modello Generalizzato per favorire lo sviluppo del settore dei servizi domestici. Il modello è stato costruito prendendo spunto dalla riuscita esperienza francese di creare di una strategia integrata e coerente per il settore in questione. La brochure dimostra come anche altri Paesi possano apprendere dall'esperienza francese, attraverso l'analisi della loro situazione corrente e l'utilizzo del Modello Generalizzato per creare una strategia adatta alle loro specificità. I casi studio sono basati sull'analisi delle situazioni in Germania, Austria, Italia e Polonia nel quadro del progetto "**Labour Market Instruments for Reducing Illegal Employment in Private Households of the Elderly**", finanziato dalla DG Occupazione, affari sociali e inclusione.

Attraverso la brochure, si intende dar vita e stimolare un dibattito su come sostenere lo sviluppo del settore dei servizi domestici negli Stati Membri dell'UE. Quindi, questo strumento è indirizzato a diversi stakeholders come: **policy-makers a livello regionale, nazionale e comunitario, amministratori locali, fornitori di servizi domestici, lavoratori domestici, sindacati e associazioni di welfare, uffici del lavoro, centri per l'impiego ed anche società di formazione.**



Streszczenie

Biorąc pod uwagę procesy demograficzne i społeczno-ekonomiczne w większości krajów europejskich, w następnych dziesięcioleciach można oczekiwać rosnącego popytu na usługi domowe, świadczone bezpośrednio u klienta. To z kolei stwarza szansę na tworzenie możliwości legalnego zatrudnienia pracowników niewykwalifikowanych lub o niskim poziomie kwalifikacji w prywatnych gospodarstwach domowych. Nie jest to jednak łatwe zadanie, ponieważ wymaga przewyższenia tradycyjnej tendencji do nieformalnego zatrudniania pracowników tego sektora. Przeszkodą w dalszym rozwoju jest również olbrzymia fragmentacja usług domowych. Dlatego też na poziomie narodowym, jak i unijnym występuje wyraźna potrzeba wykazania dobrych praktyk dla decydentów politycznych, pokazujących jak najlepiej pogodzić różnorodne, ale powiązane ze sobą potrzeby i interesy gospodarstw domowych, pracowników i firm świadczących usługi w ramach jednej, spójnej strategii. Do tej pory taka kompleksowa i koherentna strategia występuje jedynie we Francji, gdzie Plan Borloo doprowadził do znaczącego rozwoju sektora usług domowych.

Zaprezentowany raport proponuje narzędzie umożliwiające skonstruowanie równie spójnej i kompleksowej strategii – tzw. uogólniony model wspierania rozwoju usług domowych. Model został zbudowany na podstawie sprawdzonych i skutecznych doświadczeń francuskich. Raport pokazuje jak inne kraje mogą wykorzystać doświadczenia francuskie poprzez analizę ich obecnej sytuacji i wykorzystanie uogólnionego modelu do stworzenia strategii odpowiadającej ich specyficznym warunkom i potrzebom. Studia przypadków obejmują analizę sytuacji w Niemczech, Austrii, Włoch i Polsce. Analizy te zrealizowano w ramach projektu „**Polityki rynku pracy w zakresie redukcji nielegalnego zatrudnienia w gospodarstwach domowych u osób starszych**”, który uzyskał wsparcie finansowe Komisji Europejskiej - Dyrekcji Generalnej ds. Zatrudnienia, Spraw Społecznych i Równości Szans.



Zadaniem raportu jest rozpoczęcie lub też stymulowanie już rozpoczętej dyskusji nad możliwymi metodami wspierania rozwoju usług domowych w krajach członkowskich UE. W związku z tym potencjalnymi odbiorcami tego opracowania są **politycy na poziomie regionalnym, narodowym i unijnym, przedstawiciele lokalnej administracji, dostawcy usług domowych, pracownicy świadczący te usługi, związki zawodowe, urzędy pracy, firmy zajmujące się pośrednictwem i doradztwem zawodowym, a także podmioty zajmujące się edukacją i szkoleniem zawodowym.**

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CHAPTER I

Strategies for Increasing Formalised Labour in Domestic Services

by Sigrid Rand

The domestic services sector is increasingly considered to be an important occupational field with a high development potential. Therefore, the possibilities to create employment opportunities in private households are explored in several EU Member States. These processes involve researchers, politicians, representatives of trade unions as well as of social and labour organisations. Moreover, the issue of fostering this occupational field is on the agenda of a growing number of international organisations such as the International Labour Organisation, the European Commission and the European Parliament, the Committee of the Regions and the European Economic and Social Committee. This brochure provides first insights into successful strategies for increasing formal employment opportunities in private households.

Employment in the Domestic Services Sector

In most European countries, households have a growing need for domestic services. This development is related to several demographic, health and societal trends such as ageing population or increasing participation of women in the labour force. According to the estimations of different European experts, we will experience a significant increase in the domestic services sector in the coming years. For example, Cedefop expects that in the next 10 years the demand for domestic services will grow up to 10 per cent. Other actors concerned with the European employment issues such as the Committee on Employment and Social Affairs of the European Parliament, estimate that in the same period up to 20 million people in Europe could find employment in this sector. Considering this figure, the development of the domestic services sector would mean enhanced employment prospects for the un- and semi-skilled, hence furthering their social inclusion.

In the context of this brochure, the term “domestic services” denotes activities in the household, which could be carried out by members of the household, but are outsourced to persons who are not family members and in most cases do not live in the household. Domestic services can include household chores such as cooking and serving meals, housecleaning and doing the laundry, but also cover caring for children, mentally/physically disabled persons or the elderly. Usually, domestic workers are either employed directly by the household or by a professional provider of domestic services. In the case of the latter, a large variety of business models as well as employment relationships are possible (for example, the providers can be non-profit organisations or for profit firms; the employment relationships can range from full-time employment subject to social security contributions to jobs subsidised by employment authorities). For the purposes of this brochure, the differentiation will be made between private households as employers and firms/organisations as professional providers of domestic services. In both cases, expectations of households concerning the range and quality of domestic services are changing: in the case of social care in old age, for example, users are expected to become more demanding in regard to the choice of the services available to them. In order to satisfy the complex and very individual demands of households, a stronger

emphasis has to be placed on the quality of domestic services. Since it is a complex occupational segment, which requires a multitude of professional skills and personal competences, a stronger professionalisation of the sector is required. This would also increase the attractiveness of employment in the sector of domestic services and thus contribute to meeting the increasing and more sophisticated demand in the future. However, most of the employment relationships in private households are currently informal, mainly because incentives for households and domestic workers to engage in formal employment relationships are not being applied sufficiently. This is one of the main reasons why the development of the market and consequently the provision of reliable and accountable services has so far been hindered in most European countries. Due to the malfunctioning of the market for domestic services, no professionalisation of this employment segment can take place.

The professionalisation of the sector is also important from another perspective. Considering that the unskilled and semi-skilled constitute the main target group for employment in the domestic services sector, it is particularly important to offer them an opportunity for acquiring systematic qualifications, but also for validating previous (informal) experiences. This would enable them to pursue a career in the sector which could also serve as a springboard to other occupations or sectors. Since the professionalisation of the labour force in the sector can be sustainable only if qualified domestic workers find adequate employment in firms or private households, these issues need to be addressed in a comprehensive and integrated manner.

Learning from the Successful French Strategy

In some of the EU Member States efforts have been undertaken to promote formal employment in private households. There already are good practices such as the voucher system for domestic services in Belgium or the legalisation strategy of illegal migrant domestic helpers in Austria. However, these approaches have often been limited to certain aspects of employment in private households or specific target groups of the labour politics. Therefore, they have remained fragmented and limited in scope. In contrast, France has shown that the most sustainable success can be achieved with a medium- to long-term strategy. It has become known as the Borloo-Plan and involved creating a concept for the development of the domestic services sector, which systematically integrated measures and tools from all relevant fields of politics. The goal inherent to the French strategy was to create formal jobs in private households. On the whole, it included the following features:

- Involving a wide range of relevant stakeholders.
- Creating a structure for the domestic services sector by defining the responsibilities of involved actors and organisations, setting up administrative procedures and evaluating all stages of the process on a continuous basis.
- Establishing connections between single instruments in the following areas: financing of the services, activation and qualification of employees, founding and accreditation of firms, marketing and popularisation of the services.

The resulting system of interconnected instruments and of governance structures tailored to the domestic services sector is best characterised by the term “integrated approach”. So far, the success of the strategy has been impressive. Between 2005 and 2009, France succeeded in creating 500,000 new employment relationships subject to social contributions in private households, mainly for groups on the fringes of the labour market. Informal employment could thus be reduced by 70 per cent. The market volume for domestic services for the year 2009 was 16 billion Euros.

Could the French success be replicated in other countries or would it remain a singular experience firmly anchored in specific traditions and framework conditions in France? To answer this question, it is necessary to study the French strategy for creating formal employment in households and explore different ways how other countries could profit from the French experience. This was the starting point of the EU-project “**Labour Market Measures for**

Reducing Illegal Employment in Private Homes of the Elderly” involving four countries: Germany, Austria, Italy and Poland. The project followed the method of mutual learning and provided a framework for learning from the successful French strategy. All the countries involved have high shares of informal employment in private households, especially in the private homes of the elderly. Therefore, the project concentrated primarily on the problems of this group. In addition, the elderly are especially vulnerable and have potentially the most complex needs. However, the insights gained in this project can be transferred from the area of social care services for the elderly to domestic services in general. Furthermore, they can be applied to a wide variety of user groups with different demand profiles.

Even though informal employment is widespread in Germany, Austria, Italy and Poland, the issue is hardly present in the political discourses in these countries. However, change can only be brought by rising the awareness of the dangers and disadvantages of employing domestic workers informally or, similarly, working informally. Therefore it is important to channel information on developing successful strategies for creating formal employment relationships into political discourses. This could mean that it becomes an issue of political relevance and consideration. Along this line of reasoning, the main aim of the project was to initiate and stimulate discourses on national, regional and local level in the involved countries and to provide input on possible strategies for creating formal employment in private households by developing the domestic services sector.

The main contribution to the discourses in all the above-mentioned countries was an analysis of the instruments relevant to the provision and utilisation of domestic services. To that end, the sets of instruments used in France served as a blueprint for documenting their counterparts in the involved countries. The analyses were interpreted against the background of the national situation in social care. Based on this information, discourses were stimulated or initiated by starting discussions with discussed with the relevant stakeholders. At the centre of these considerations was the specification of the existing instruments as well as supplementing them with other matching tools and incorporating them into overall strategies.

When preparing the input for stimulating the national discourses, the project team reached the common insight that the field of domestic services in the selected countries is fragmented and that the situation could not be improved by isolated initiatives. Therefore, the integrated concept constitutes the key part of the development of successful and sustainable strategies for creating formal employment in private households. Only the systematic establishment of interconnections between instruments, involvement of major stakeholders and development of appropriate governance structures would bring major progress. To that end, the notion of a Generalised Model was explored and specified. It was brought into political discourses in Germany, Austria, Italy and Poland and thus received feedback from the experts and relevant stakeholders. The Generalised Model can also be applied in other countries that are interested in addressing the topic and need a frame of reference for setting up their strategies. In practice this means that they can identify the relevant areas for the provision of domestic services in their countries, can detect the weaknesses of the present system and work towards previously defined goals.

The Contents of the Brochure

This publication addresses stakeholders and other interested parties who would like to learn about strategies which support the development of formal employment in domestic services. Firstly, this brochure offers an insight into the French Borloo-Plan with the aim to help the reader to understand why the French strategy was so successful. Secondly, it will present examples which demonstrate how the French ideas and strategies could be used to stimulate political discourses and devise corresponding strategies in the four selected countries. The examples show quite a variety in the transfer between Germany, Austria, Poland and Italy. This is mostly due to the historical, socio-

economic, cultural and demographic differences between the countries, which result in variations in national framework conditions. The description of these examples should give the reader concrete ideas how to learn from the French experience. And thirdly, the above mentioned Generalised Model will be presented. It is conceptualised as a blueprint for a strategic model, which is expected to foster the development of formal employment in domestic services as best as possible. This model can be used by interested stakeholders and others as a frame of reference when considering which goals to set and which strategies to choose for achieving them. The three sections of this brochure could be read independently from each other.

Creating an appropriate regulatory framework is an important part of integrated approaches. Apart from the national governments also actors such as the European Commission, the European Parliament, the European Economic and Social Committee or the International Labour Organisation can assume an active part in stimulating discourses on European, national and regional level. Furthermore, they can give important impulses to national and regional governments and civil societies for developing relevant framework conditions. The outlook of this report points out the possible application fields of the generalised integrated concept for other EU Member States not involved in the project. Moreover, it reflects on how the impulses from European and international actors can stimulate and facilitate the process of creating formal employment in private households.

CHAPTER II

The French Strategy: The Borloo-Plan as the French Success Story

by Stefan Ekert

The French experience of creating formal employment in private households by developing the domestic services sector is unique, especially considering the successes in a relatively short period of time. Despite the specific conditions of the political system and long traditions of employing domestic workers in private households in France, other countries can still draw lessons from the French experience for setting up similar strategies. To be able to do that, it is necessary to study the central elements of the French strategy as well as the different stages in the policy-making process.

Beginnings of Policy-Making Targeting the Domestic Services Sector

In France, formal employment of domestic workers in private households has a long tradition, especially in wealthier families. As a result, the most important stakeholders in the field, such as the **Fédération des Particuliers Employeurs (FEPEM)**, can look back on a long history of interest representation. It was founded in 1948 as an association for private employers of domestic workers. It consults its members and represents their interests towards the politics and trade unions, among other things by collective bargaining for domestic workers. The **IRCEM** (Institut Retraite Complémentaire des Employés) was founded in 1973 as social insurance for employees in households. Despite the long tradition of well-established stakeholders, the domestic services sector is also open to new actors. In 1994, **Institut FEPEM** was founded with the goal to develop standardised qualification measures for employees in private households.

The existence of stakeholders and organisations committed to the development of the domestic services sector served as a starting point for strategic deliberations involving a wide range of policy-makers from related fields. Establishing the market for domestic services has been a targeted aim of the French policy-making since 1987. Since then, new measures have been implemented at an interval of several years and have offered new impulses to the stakeholders. Nevertheless, for a long time formal employment of a domestic worker was still too expensive for less wealthy households and the development of the market for domestic services was slow. As a result, services from legal service providers were not just too expensive for large numbers of households, but also of unaccountable quality and complicated to combine. Even though formal employment in private households existed at the core, a considerable part of the domestic services sector was dominated by informal employment and a mismatch of demand and supply. This hindered the further development of a market for domestic services and made formal employment in this sector unattractive. Therefore, the aim of the policy-makers was to cover the demand for domestic services, reduce informal employment and open up new formal employment opportunities in private households. To that end, a plan was set up with the specific goal to create 500,000 new employment relationships within five years. In 2004, the most important stakeholders signed an agreement in which they committed themselves to supporting the establishment of a "Pôle d'excellence nationale dans le secteur des services à la personne".

A Comprehensive Strategy to Foster the Development of the Domestic Services Sector

In November 2004, all relevant actors of the sector met at a national conference to discuss the market for domestic services and its importance to the whole French society, as well as its shortcomings and possible solutions to the challenges. Representatives of 22 ministries, trade unions, the association of private employers and service providers were represented at this conference and they agreed to develop a legal and professional market for “Services à la Personne” as it existed in other industries. At this conference and in the next months they identified the following bottlenecks in the market:

- Utilisation of domestic services was too expensive for many households.
- The legal remuneration of minor services or of those provided on an hourly basis was too complicated.
- Many households did not know where they could find a suitable service provider (possibly at a short notice).
- The trustworthiness and reliability of the service providers was often limited.
- The quality of the services was neither consistent nor adequate.
- Employment conditions (e.g. remuneration, further learning opportunities) were unattractive and career prospects almost non-existent.

SERVICES À LA PERSONNE FOR THE ELDERLY

Services à la personne for the elderly include:

- ✦ Non-medical care during the day and in the night, e.g. in the case of an illness
- ✦ Day care
- ✦ Food delivery
- ✦ Accompanying and transportation: they can be accompanied to a specific place, but also for doing their shopping
- ✦ Housework: ironing; cleaning the windows or the floors; cleaning the rooms
- ✦ Handyman tasks
- ✦ Gardening
- ✦ Cutting hair
- ✦ Help with administrative formalities: writing letters, filling out forms, archiving bills, etc.
- ✦ Looking after pets
- ✦ Looking after plants in the absence of the owner
- ✦ Driving the car
- ✦ Personal hygiene: make-up, washing, etc.
- ✦ Tele- und visual assistance: assistance at distance

Source: <http://www.servicesalapersonne.gouv.fr/personnes-agees-%281434%29.cml?>

To overcome these problems, quantitative targets and a timetable were developed. The policy-making process included following stages:

- A standard and acceptable definition of “services à la personne”.
- A new National Agency was created to manage the developing process of the market.
- 19 new measures were defined. They targeted at all areas of the market: supply, demand and labour force. Instruments from different political fields were combined.
- The state represented by the Minister of Labour and Social Affairs, Jean-Louis Borloo, committed to developing this sector and providing 500,000 new formal employment relationships within three years. The plan was therefore named after its promoter as Borloo-Plan.

Instruments

The French strategy included a number of measures and instruments to encourage the development of the market for domestic services. Some of them already existed and were just continued or modified, others were devised specifically in the course of the strategy to complement the existing instruments. This shows that the success of the political approach depends not only on the great number of instruments or the volume of invested public money. Rather, it was the result of the integration of instruments from different political fields, so that all problems of the sector were handled at the same time.

The most important instruments and measures were:

- The creation of L'Agence nationale des services à la personne (ANSP) as a new public institution with wide sector representation. Its task is to implement, coordinate and to manage the implementation of the Borloo-Plan and to promote transparency and quality in the market. A further task of the ANSP is the distribution of the service cheque CESU (see next point).
- The **CESU** exists in two different forms. It is a payment instrument for private households and an instrument to finance the demand of domestic services for firms as well as for local authorities and insurances. The first form of CESU is a pre-printed chequebook, which households can get from their bank. It is attractive to use it, because social contributions are deducted automatically and it serves as a proof of legal expenditure in relation to tax (see next point). The second one is a pre-financed voucher, which can be used to pay domestic service providers too. Firms buy these vouchers and use them as a perquisites instrument for their employees because of the tax advantages. Additionally, local authorities and insurances dispense them to the needy.
- **Different tax advantages** strengthen the demand side or reduce the price of the supply: households can write off 50 per cent of legal expenditure for domestic services against private income tax up to 12,000 Euros p.a. and firms profit from tax reduction up to 500,000 Euros per annum when they dispense pre-financed vouchers to their employees. Each employee can get vouchers in the value up to 1,830 Euros p.a. Finally, the VAT rate for domestic services is reduced to 5.5 per cent compared to the regular VAT rate of 19.6 per cent.
- **A special instrument that strengthens the demand of the elderly** is the so-called 70+ rule. Since 1987 private households have not had to pay any social contributions for directly employed workers if the employer is 70 years or older.
- **Establishing of multi-service structures** and “trade-marks” as a marketing tool (“enseignes nationales”), which is closely connected with the responsibility to provide services of high quality. This aims at professionalising the market and to improving the access to services. “Enseignes nationales” are platforms that specialise in certain domestic services, guarantee defined quality standards and bundle the services. As pioneers they should professionalise the market and offer a broad and well-accessible service spectrum of premium quality. These platforms provide information and agency services, give an overview of the partners and market their offers. The French government supported the market launch of these new “trade-marks”.

- **Service providers have to be accredited by the ANSP.** There exist two forms of accreditation: simple accreditation and high quality accreditation, which is useful for suppliers that provide services for elderly and disabled people.
- **Measures for better working conditions and higher quality:** each domestic worker has a right to a 20-hour-long training per year (it can be accumulated for up to six years) subject to continued payment of remuneration. The Institute FEPEM and others developed a lot of different and specialised courses for this new clientele. Another important instrument is validation of acquired experience, which is a significant measure aimed at recognising informally acquired experience. To the domestic workers, it may serve as a stepping-stone to further formal qualifications.

In 2009, the Borloo-Plan was evaluated. Successful measures were carried forward, whilst less successful ones were improved and also implemented. Additionally, new measures were devised to facilitate further development. For example, the rule that the pre-financed check (handed out by firms as a perquisite to their employees) had to be cashed in by the recipient was cancelled. Since then employees, who have received checks from their employer, have been allowed to pass them on to their elderly relatives. Also the arrangement that professional SAP providers must offer several different services in order to be authorised (multiservice idea), proved to be counterproductive and was abolished in 2009.

In summary, it can be concluded that France has continuously and successfully been pursuing a path of consistent development of the legal market for domestic services. A great deal of success can certainly be accounted to tackling different bottlenecks of the market simultaneously and implementing instruments from all relevant political fields. By recognising that different policy fields, such as tax and family policies, but also labour market, economic and vocational education and training policies complement each other, the policy-makers have thus managed to achieve various social and political targets.

The Dynamic Strategy Leads to a Success

Without doubt, the market for formal domestic services has developed drastically: the number of domestic workers has nearly doubled to 2 million people, the use of CESU is growing swiftly and the sector value had risen to 16 billion by 2008. So far, 2,000 new businesses have been established, professionalism has increased and more than 17,000 firms have used the pre-financed voucher (CESU) as an instrument to support their employees. The informal employment has shrunk by 70 per cent. In 2011, domestic services are used by a wide share of the French population. However, even though these numbers are impressive, the policy-makers did not content themselves with the first successes. The French strategy is characterised by a dynamic flexibility in the policy-making process, which means that the results of evaluations are incorporated in the adjustment of goals and/or the further execution of the strategy. This approach enables continuous optimisation of the existing instruments whenever needed.

The flexibility and innovative character of the instruments involved in the French strategy for domestic services make the Borloo-Plan a best practice example. The strategic design of the policy-making process as well as the advantages of the integrated concept should be of particular interest to other countries. In the following, the situation in Germany, Austria, Italy and Poland will be discussed against the background of the main elements and stages of the French strategy for developing the sector of domestic services.

CHAPTER III

Learning from France: Experience in Selected Countries

Domestic services is a complex market segment, since it is very strongly influenced by a set of relations lying at the intersection of state, market and family. As argued before, this constellation calls for integrated concepts for creating systematic and reliable connections between these different areas by deploying interconnected sets of instruments. Also, strategies fostering the development of the domestic services sector need to involve three groups in the process, the so-called “three pillars” central to the segment of domestic services: the households, the employees and the firms (service providers). The aim of this chapter is to provide our target audience with practical examples of how different countries could work towards creating strategies for fostering formal employment in the sector of domestic services. For that, it is necessary to take into account the existing framework conditions as well as instruments and find ways how to modify them in an attempt to create an integrated concept of providing domestic services.

Therefore, after having presented the successful French strategy, the starting points and necessary steps for similar strategies in Germany, Austria, Italy and Poland will be presented. To start with, the case studies will analyse the main reasons for the prevalence of informal employment in private households hindering the development and subsequent professionalisation of the sector of domestic services. Since the orientation and success of every strategy depends on the interests of the involved stakeholders, the constellation of most important actors in every country will be briefly discussed. As argued above, it is essential to incorporate existing instruments into the integrated concepts and therefore the most important instruments and measures are presented in more detail. Finally, the necessary steps towards creating an integrated concept in each country will be outlined and the first attempts to move in that direction will be discussed.

Germany

by Sigrid Rand

Long Tradition of Informal Employment in Private Homes

Germany is one of the European countries with the highest level of informal employment in private homes: it is assumed that 90-95 per cent of employment there takes place informally. This figure includes informal employment of (illegal) migrants as well as informal work performed by neighbours, friends and acquaintances. Informal work is especially widespread in the households of elderly people. According to current estimations, there are at least 500,000 to 600,000 informal domestic workers in the households of the elderly.

In the case of social care services for the elderly there are several factors, which can explain the prevalence of informal work in households:

- ❖ In Germany, providing (social) care for the elderly is traditionally the responsibility of the family.
- ❖ There is no widespread tradition of formal employment in private households.
- ❖ The awareness of the possible consequences and hazards of informal employment is limited both on the side of the households and the employees.
- ❖ At the current rate of social contributions (about 40 per cent) as well as the VAT rate (19 per cent), social care services by a professional provider would cost 18-20 Euros per hour as opposed to 8 Euros informally.
- ❖ Care benefits from the care insurance can be received as a cash payment and there is no obligation to document its expenditure on regular services or employment.
- ❖ Incentives for formalised employment relationships like tax refunds or reduced social insurance contributions are not available to all users of domestic services and thus the scope of these instruments is limited.

These factors are also valid for the whole of domestic services. Consequently, employment in private households is largely unregulated and underdeveloped. There have been singular attempts to reduce the cost of domestic services and make private households a more attractive place of employment. As a result, Germany can look back at a multitude of programmes and model projects on federal, federal state and communal level, but most of these initiatives have remained limited in scope. In order to achieve far-reaching and sustainable results, a comprehensive and cohesive strategy is needed for developing the domestic services sector. This point of view is increasingly shared by important stakeholders such as the ministries on the federal and federal state level, municipal bodies, labour administration, qualification providers and, in a more reserved manner, by welfare associations.

Stakeholders Recognise the Need for Action

Since end of 2010, the development perspectives of the sector of domestic services have been discussed in several **federal ministries**, such as the Federal Ministry for Labour and Social Affairs, the Federal Ministry for Economics and Technology as well as the Federal Ministry for Family, Senior Citizens, Women and Youth. Since Germany is a country with a federal structure, also the ministries on the level of the individual **federal states** ("Bundesländer") can assume an important role in stimulating discourses and initiating policy initiatives. Both on the federal and the federal state level the perception is emerging that a common framework for domestic services is crucial for several reasons: creating formal employment, enhancing the employment opportunities for several labour market policy target groups, increasing the supply of reliable and professional services covering the needs of different types of households.

The most important actors in the field are the **welfare associations**, who are providing comprehensive health care services in private households and could also become more active in the field of social care provision if they were to recognise this area as a relevant field for their activities. The association “Bundesverband Haushaltsnaher Dienstleister” is a group representing the interests of a very homogeneous group of **commercial providers of domestic services**. Their main interests lie in promoting the professionalisation of their field of activity, bringing up issues hindering the growth and development of their sector (e.g. the missing firm classification levels for providers of domestic services, the limited opportunities for acquiring a credit or finding professional consultancy in all phases of firm development and the lacking awareness of the households in regard to the advantages and qualitative superiority of the offered services). Several **providers of (further) qualifications and training** are also interested in the professionalisation of the sector of domestic services and standardisation of requirements both for qualification as well as validation of previously acquired skills. The interests of employees or potential employees in the sector will be better represented, once the **trade unions** are prepared to become involved in the discourses, and contribute to the definition of the framework for this new employment sector.

How could a strategy be developed which would find a common denominator for those diverse interests and bring together the different actors? As we learnt from the French strategy, it is important to unify already existing instruments and measures to a coherent system.

Going Beyond “Minijobs” and Tax Breaks as Incentives for Formal Employment

In Germany, there are several instruments, which support creating formal employment in the sector of domestic services and social care. The most important ones can be found in the area of tax reductions and returns.

- ❖ **“Minijobs” in private households:** the system of “minijobs” enables private households use a simplified procedure for registering their domestic worker (“Haushaltsscheckverfahren”). The latter may earn up to 400 Euros per month and the households as employers profit from reduced tax rates for social security contributions (14.34 per cent flat rate contributions including shares for health pension and accident insurances as the most important articles). “Minijobs” have become increasingly popular over the past years. Currently, there are more than 250.000 persons working in households as “minijob”-employees.
- ❖ **“Minijobs” in firms:** the system of “minijobs” leaves firms strongly disadvantaged in regard to social security contributions, since they need to pay 30.67 per cent social security contributions for their “minijob”-employees.
- ❖ **Tax refunds** for expenditures on household helpers and handymen. In general, 20 per cent of expenses up to 20,000 Euros can be refunded from tax obligation, but the upper limit is 4,000 Euros. In the case of “minijobs”, 20 per cent of up to 2,550 Euros spent by a household can be refunded (thus, the maximum amount is 510 Euros). In the case of employment relationships subject to full-rate social security contributions in private households, 20 per cent of 20,000 Euros can be refunded, i.e. the maximum amount would be 4,000 Euros. Further tax refunds include claiming back 924 Euros for care services by the elderly, whereas it is not necessary to provide a proof of need for care. This tax refund can also be utilised by the relatives, who are caring for the elderly.

Currently, these are the main instruments specified to the sector of domestic services. For example, in regard to crucial areas such as qualification and placement of labour market policy target groups there are huge deficits, even though there is a whole range of well-developed general labour market instruments for activation, consultancy and placement of relevant target groups: facilitation of integration into the labour market and wage subsidies for welfare recipients; consultancy services, profiling and competence assessment offered by labour administration offices, social administration, welfare organizations and other actors; advanced learning and continuous education courses. However, since the sector of domestic services is underdeveloped and the career prospects for potential employees are limited, most of the placement and consultancy services do not focus on domestic services. This also means

that even though employment in this sector could have the function of a springboard to other jobs on the first labour market, the employees can rarely pursue this strategy due to missing career opportunities.

This example from the perspective of employees shows that Germany is still a long way away from an integrated concept for the sector. Concerning the other two pillars, the firms as providers of domestic services and the households, similar observations apply.

Three Strategic Steps to Developing the Domestic Services Sector

In Germany, the first plans towards a strategy for domestic services aim at creating a new and attractive field of employment in private households. Therefore, main employment opportunities are seen for groups on the fringes of the labour market. This means that the strategy could build on sets of already available instruments in the area of activation of long-term unemployed, entrance to the first labour market and further qualification, which could then be easily specified for the domestic services sector. The employment effects of this strategy also central to the discourses on domestic services. Additionally, it is stressed that the strategy should also incorporate complementary elements such as assessment, qualification and certification of domestic workers, but also support for providers of domestic services so that their activity would result in more jobs.

As a result, the following elements are considered central to the German strategy of setting up an integrated concept:

1. Initiating and stimulating discourses and involvement of relevant stakeholders in the preliminary stages of the strategy.
2. Developing and implementing instruments specified to the needs of users, employees and service providers.
 - On the side of the users, different incentives are needed depending on the type of households (e.g. instruments available also to the elderly who do not pay taxes) and their financial means (e.g. subsidised vouchers for needy families/persons).
 - Since there is a very strong emphasis on private households as employers of domestic workers, a comprehensive framework is needed for defining working conditions and standards in this field of employment. In order to foster the professionalisation of domestic workers, improvements in provision of qualifications and validation of previous (informal) learning are required. Employment of certain labour market policy target groups in the domestic services sector needs to be actively promoted by labour offices.
 - Information and marketing campaigns supporting the establishment of well-known trade-marks complement the instruments in the other areas and help overcome the long tradition of informal employment in private households. To foster the development of providers of domestic services, (financial) instruments available to firms in the area of domestic services need to be specified covering all stages of firm development.
3. Creating a governance structure for the domestic services sector taking into account the federal system in Germany.

The relevant stakeholders in Germany recognise the need to develop visions for generating new answers to the demographic challenges of the society. Once encompassing knowledge of the already existing organisations, actors, processes and regulations in the domestic services, as well as in the related areas is obtained, the issue can be taken on the political agenda. The federalist structure of Germany calls for a simultaneous top-down and bottom-up initiatives. The Social Ministry of Hesse intends to start a Federal Council initiative for the amendment of the legal framework for domestic services in autumn 2011. This is a good example of a federal state initiative in the federalist structure of Germany. Discourses have been initiated also on the federal level, but they still need to overcome the sectoral confines.

Austria

by Veronika Richter and Tom Schmid

Primacy of the Family in Providing (Social) Care Services

Also in Austria, informal work in private households is traditionally widespread with the exception of long-term care. There, a legalisation strategy targeting long-term assistance in private households started in 2007 and succeeded in reducing informal (migrant) employment in the households of the elderly by 80 per cent within two years. As a result, the current status of legalisation of 24-hour-support is about 80 per cent. In all other areas of domestic services, most of the work is still performed informally. The Austrian system of (social) care services is characterised by the following features:

- ❖ The system of (social) care and support relies on the family (80 per cent of elderly persons in need of care are cared for by their relatives and by social service organisations, in average one hour per day).
- ❖ Caring relatives profit from free of charge contributions to health and pension insurances.
- ❖ The elderly in need of care receive cash benefits and the requirements to provide proof of formal employment of a carer or a domestic worker are lax.

Consequently, domestic services for private households exist, but they are insufficient to cover the (potential) demand. The main attempts to challenge widespread informal employment have been made in the course of the legalisation strategy, but only for the relatively target group of families who used 24-hour-support illegally before (about 20,000 households altogether). Thus, this strategy has had little positive effects on the development of the sector as a whole.

The Positions of the Stakeholders Vary

Even though the legalisation strategy has not managed to create sustainable and effective impulses for the development of the whole domestic services sector, it is often considered sufficient by the relevant stakeholders. This is an example of how a partial success can block discourses on any further development, not to speak about concrete initiatives. Furthermore, the reforms would need to be negotiated between the political parties in the parliament, social partners as well as the federal state government, the nine province governments and the social partners at local level. As political processes in Austria tend to be generally very cumbersome, general scepticism in towards the chances of success prevail. For example, the law on harmonisation of qualifications in care services took 10 years to complete. Additionally, the Austrian federalist political system serves as an argument for the various difficulties with establishing a nationwide policy comparable to an integrated approach such as the French Borloo-plan.

Therefore, it is not surprising that the stakeholders in Austria support improving already existing instruments instead of implementing new ones. However, it is important to stress the need to connect the different instruments so that they complement one another. To reach this goal, the discourses in Austria have to take up impulses beyond the legalisation approach. To that end, the study of the lessons from the French strategy can be particularly helpful.

The trade unions plead for formal employment (also) in private households with the associated benefits such as social insurance and opportunities for collective bargaining (e.g. wages, working time). To that end they advocate the introduction of a nationwide new capital tax and the Tobin-tax. Considering the current situation of the national budget and the recent cuts of the social welfare benefits (cuts in pension systems, long-term care allowance and

family allowances as of 1 January 2011), this position becomes illusionary.

The welfare associations are still running services for private households, e.g. for gardening, cleaning, washing, but on a low level in several places in Austria. The costs for the welfare associations are about 25 Euros per hour, the maximum affordable price for private households would be 15 Euros per hour, depending on the local price level. Therefore, the intentions of the welfare associations to expand their supply of domestic services need additional funding from the state, which might prove difficult considering the crisis of public finances.

The welfare associations are also providers of 24-hour-services, but on a smaller scale (the market position of the agencies specialised to providing 24-hour-support accounts for 90 per cent of the whole market). As providers of care work, the welfare associations take the stance that legalised 24-hour-support could be a necessary addition to their services for families who need more assistance than one or two hours of care each day. But the welfare associations point out that there must be quality assurance and anti-dumping regulations.

The Austrian Labour Authority (AMS) sees no need for a labour market segment for low-skilled workers in private households. This position is founded in the special situation of the Austrian labour market: Austria has the lowest unemployment rate in the whole EU. The average duration of an unemployed period is less than 90 days, and there is only a small group of long-time unemployed. This group has to deal with very specific problems (alcohol, drugs, debts, sickness) and therefore most persons in this group are not able to work in private households. On the other hand, there is currently need for 7,000 more nurses with diploma (in hospital care and in mobile care) which cannot be satisfied by the labour market.

Even though the Federal Social Ministry concedes that there is a need to tackle the problem of informal work in private households, the policy-makers do not have any concrete plans.

Legalisation Is Not the End of the Story

Following counterparts for the French instruments central to their strategy are:

- ❖ Legal employment as a prerequisite for receiving full rate of care benefits
- ❖ Funding of domestic services provided by non-profit organisations. These are low-priced formal services performed by persons with hampered access to the first labour market (e.g. disabled persons, long-term unemployed). These services are founded mainly by the labour market authority and the federal authority and thus the households have to pay a small fee, which is about half the price of the regular market price.
- ❖ “Dienstleistungsscheck”, i.e. vouchers with the nominal value of 10 Euros costing the household 10.2 Euros. Since the current (informal) market rate for domestic services is about 7 Euros, this instrument is not accepted by the households. Only 1,000 vouchers are sold per year.
- ❖ Tax breaks, which become relevant if the sum spent on formal care services exceeds a certain percentage of income for the elderly persons or their children if they pay for the services (e.g. the 24-hour-services).

By looking at the instruments it can be seen that to a large extent, the connections between them are missing and that there are no distinct clusters of instruments. In summary, Austria needs to overcome its strong reliance on its legalisation success at federal and local level, if it does not want to end up glorifying the past instead of developing new strategies for increasing problems.

Which Strategies for Developing the Sector of Domestic Services?

On the bright side, it has to be noted that Austria already has experience with conceptualising and implementing strategies relevant to the sector of domestic services, however limited in scope these may be. Considering the main challenges of the sector, the crucial steps would include:

- ❖ Reducing the costs of formal employment by targeted subsidising of social security contributions
- ❖ Evaluating the instrument “Dienstleistungsscheck” with the aim to make it more attractive for the relevant target groups.
- ❖ Modifying the existing instruments so that they comply with the preference of the households for employing self-employed persons in possession of trade licence (“Gewerbeschein”) over direct employment of domestic helpers by a household
- ❖ Creating perspectives for migrant workers who are prepared to take up employment in that segment to counteract their expected outflow from households after the opening of the labour market on 1 May 2011.

On 16 March 2011, the federal government and the governments of the nine provinces signed an agreement on the new care fund and the structure for financing the care and assistance services for the elderly until 2014. Among other things, this will open up new possibilities for tackling informal work in the households of the elderly. Furthermore, the opening of the labour market to migrant workers from EU New Member States as of 1 May 2011 (year 2013 for Bulgaria and Romania) is expected to result in the entry of (informal) domestic workers into other more profitable and more regulated sectors. Should this development occur, it is very likely to trigger relevant discourses on the issue of creating sustainable and far-reaching strategies for fostering formal employment in the domestic services sector. Moreover, the standard-setting activities of the International Labour Organisation for domestic work will provide a wider perspective for the discourses and activities in Austria. Recently, several activities have been developed in the field of labour market policy, run by new NGOs and supported by the trade unions (e.g. “Prekär Café”)

Italy

Annamaria Simonazzi and Sara Picchi

Informal Employment Is Still the Norm in Private Households

Also Italy has a large share of informal employment in private households where most of the domestic work is carried out by (illegal) immigrants. So far, the Italian politics has oscillated between legalisation strategies (like the one in July 2006 when 517,000 immigrants received legal status) and implicit toleration of the informal. The reasons for widespread informal economy in private households of the elderly are similar to the ones in Germany and Austria:

- ❖ Long tradition of informal work not only in families, but also in other sectors of the economy. Not only is the employment of illegal immigrants customary, but the existence of an extensive informal market has also pushed the legal migrants towards informal work.
- ❖ The family is still seen as the most important provider of care. This tendency was reinforced by the recent White Book, which places the family at the centre of the new welfare model by emphasising the economic and moral role of the family. Thus, it affirms the distinctive characteristics of the Italian welfare system where the central position is assigned to the family as the major actor with the responsibility to deliver resources (economic and relational) to its own members and to the society as a whole.
- ❖ Untied attendance allowance for dependent people with severe disabilities. It is a cash allowance, which is not means tested and does not depend on the family structure of the person in need. In 2010, it amounted to 480.47 Euros per month.
- ❖ Italy has a federalist political system like Germany and Austria, but faces even more difficult challenges due to the grave regional disparities between the North and the South. This study concentrated on Lombardy, since the demographic projections for the region show a faster ageing process and the regional authorities have a clear long-term care policy. As a result, Lombardy is a region with a dynamic legislative framework and a wide range of instruments in (social) care for the elderly. The account of the instruments on the regional level will be complemented with those on the national level.

Informal employment in Italy is thus strongly anchored in its traditions of informal work, the role of the family, a large influx of (illegal) immigrants and the governance of the (social) care system. So far, the stakeholders have found creative ways of dealing with the current situation: the trade unions and several NGOs, for example, have tried to organise illegal domestic workers and represent their interests. However, these initiatives have remained singular and the policy-makers have not been able to develop and implement a coherent strategy creating accountable framework conditions making the domestic services sector more attractive for the users, the employees and the providers.

Off to a Good Start With the Help of Local Authorities?

The relevant stakeholders in the field of domestic services in Italy are local authorities, home care agencies, cooperatives, employers' associations and trade unions. They agree that the informal market for the (social) care services is not sustainable and that specific instruments for creating legal employment in the sector are needed.

In the last few years, the domestic services sector has gone through a marketisation process and become more competitive. The market has been opened up to a larger number of **providers of domestic services**, but as a result

it has also become more unstable and uncertain for accredited organisations who find it difficult to match demand and supply. Furthermore, there is always the danger that in pursuit for a competitive edge the firms resort to cutting labour costs as part of cost-effective and efficient management.

In the Italian (social) care system, the **local authorities** (*comunes*) have an important role to play. They allocate care allowance, which is means-tested and usually smaller than the attendance allowance. However, the local authorities have started using vouchers for this financial support, which makes possible to ensure that its use complies with the rules. Additionally, the local authorities provide information, assistance and advice to families and domestic workers. In particular, they offer consulting to families in regard to the employment contracts of domestic workers as well as act as mediators in (potential) conflicts.

Local authorities, who already have extended responsibilities and competences in the area of (social) care for the elderly, should be firmly incorporated into the strategy for the sector of domestic services. Experience with the development and administration of instruments for the sector can make them important allies of the national government in devising and implementing strategies.

(Social) Care in Lombardy: A Differentiated System of Vouchers

The main instruments implemented in the Lombardy region are vouchers, which are issued either by the local authority or by the local health agency. The vouchers issued by the local authority are:

- ❖ **Buono sociale**: this instrument supports family members who look after a dependent relative. The basis of assessment can vary from district to district and thus the amount received is different.
- ❖ **Buono miratio** and voucher **formazione**: aimed at regularising employment relationships by providing families financial support with paying the social security contributions and wages for the domestic workers. Also, the voucher can be used to support training and skills upgrading of the domestic workers. Again, the value of the voucher varies according to the need of care, existence/absence of family network, the financial needs and the overall number of applicants.
- ❖ **Voucher sociale**: provides a way to purchase domestic services from public or private accredited agencies with the aim enable dependent people a longer stay in their own homes.

The local health agencies in Lombardy issue the voucher socio-sanitario, which can only be used for buying integrated health and social care services from accredited public or private (profit and non-profit) organisations. The services are provided in private homes by qualified personnel. And the value of the vouchers is based on personal needs.

The vouchers available on the regional level are supplemented by tax refunds granted on the national level. It is possible declare the costs which were incurred by buying domestic services, but the tax refund does not cover the difference between formal and informal services. This is especially the case with co-residence of domestic workers, where the difference can be as much as 40 per cent.

Even though the system of vouchers is well-developed, Lombardy still needs a structured integration of these instruments and a complementing set of measures covering other related areas such as qualification of employees, accreditation of service providers, fostering of start-ups in the sector. Additionally, it would be important to pre-emptively devise measures to avoid misuse of the advantages offered by the instruments. For example, service providers might be tempted to abuse the opportunities made available by legislation regulating flexible employment. Another practice is to employ a domestic worker for maximum 25 hours per week and benefit from lower social insurance contributions and tax contributions – whilst the employer person works longer hours. Therefore, a successful strategy would need to minimise the possible misuse of the system.

Extending the Regional Successes to a Supraregional Framework

Some instruments developed at the regional level in some of the advanced regions like Lombardy can be implemented also at a supraregional level. The steps which will most probably render best results and therefore need particular attention are:

- ❖ Reimbursement of social security contributions of domestic workers to reduce the costs of the services
- ❖ A more widespread use of vouchers conditional to formal employment of domestic workers. Additionally, vouchers could be specified to utilisation in the context of cooperatives and their information and consulting services, making it easier for users to obtain necessary information.
- ❖ Creating connections between the instruments, e.g. embedding vouchers in the context of an information framework closer to the needs of the citizens and at the same time tying them to a system of quality evaluation.
- ❖ General supraregional framework defining a catalogue of services, service standards, minimum requirements to domestic workers, quality evaluation procedures.
- ❖ Simplification of bureaucratic practices in regard to the access to domestic services and registering employment relationships.

This strategy would enhance the user's freedom of choice, but at the same time provide a framework for reliable assessment of the quality of services. Whilst the necessary framework conditions would be binding and developed on the national level, the local level would still remain in the focus for setting up an integrated concept of the provision of domestic services. It would enable the regions to take into account their different needs regarding the demographic and employment situation, but also their financial means. This would help to create an information and support system closer to the needs of the users.

Poland

by Jan Brzozowski and Aleksander Surdej

Socio-Economic Change Affects the Situation of the Elderly in Need of Care

Of the four countries in the project, Poland is the only one, which has to carry the burden of communist legacy on top of the challenges also described in the case of Germany, Austria and Italy. As many other European countries, it faces the problem of an ageing population. In the next decade, a sharp growth of the 65+ population can be expected: it will increase from 5.15 million in 2010 to 6.95 million in 2020. Since young people increasingly prefer leaving their parental homes to living in multi-generational families in the same household, a dynamic growth of single-person households can be observed. Since the gap in male and female life expectancy is nine years, most of these households would be constituted by 80+ women within the next twenty years. Moreover, as women in Poland retire at a relatively early age (in 2006, 58 per cent of women receiving a pension had retired between 55 and 59 years of age) and the employment rate of women has traditionally been low so far, most of the female seniors in the future would have a low pension or would not be entitled to formal pension payments at all.

A lot of research has been done recently on the out-migration of Polish citizens to the EU-15 Member States, but we still know relatively little about Poland as a receiving country for workers from the countries on the other side of the EU's Eastern border. The majority of the (illegal) immigrants from the Ukraine or Belarus are employed in the informal economy, the largest share work in private households. However, the share of informal workers in private homes of the elderly is very small compared to Germany, Austria or Italy. The current system of elderly care is strongly family-oriented and as a result only 1.5 per cent of the carers are external. The responsibility of the family for their elderly relatives has a legislative as well as a socio-cultural basis. Nevertheless, in the coming years the ageing of the population will lead to a skilled labour shortage and the economy will depend on the entrance of women into the labour force. Therefore, the Polish policy-makers face following challenges in developing a strategy for the domestic services sector:

- ❖ Developing a system of (social) care services for the elderly which takes into account that a lot of the elderly will have very limited financial resources and will be living alone.
- ❖ Creating opportunities for women to reconcile family life and work.
- ❖ Pre-emptively preventing the remittances of the Polish migrants in Great Britain, Ireland or Germany to be used for hiring domestic workers informally, e.g. as carers for the elderly parents.
- ❖ Establishing better quality assurance mechanisms and qualification opportunities in order to foster the professionalisation of the sector of domestic services

These are challenges, which have strongly to do with creating a reliable and coherent framework for domestic services in general and (social) care of the elderly in particular. Therefore, this process requires above all an intervention by the legislative.

The Policy-Makers Acknowledge the Necessity of Reforms

Compared to Germany and Austria, Poland does not have an extensive system of welfare associations. The market for the elderly (social) care services is still at an early stage of development, but there is a growing demand for them in Poland. Elderly (social) care services are provided in a dual model: by **public offices** and by **informal service providers**. The latter are in a stronger position than the elderly in price negotiations. The working conditions and wages of domestic workers are not on the agenda of the trade unions yet. However, the governing party Civic Platform (**Platforma Obywatelska**) has recognised the seriousness of the situation and created a **parliamentary working group** for the law on dependency risk insurance. It is preparing a special law that would introduce an obligatory dependency insurance and create a new system of support for the dependent (elderly) persons in Poland. Even though this initiative is a step in the right direction, it is still a long way off from an integrated concept. In the following, the currently available instruments will be presented.

Missing Sets of Instruments Hindering the Development of the Sector of Domestic Services

In Poland, only a few instruments supporting the (social) care for the elderly exist:

- ❖ Financial assistance for nursing (**zasilek pielęgnacyjny**), to which every person aged 75+ is entitled. The benefit is provided in cash and amounts to 153 zloty (ca. 38 Euros) per month. As it is not means-tested, it is an extremely ineffective instrument.
- ❖ Fixed benefit (**zasilek stały**) for those elderly persons who live alone and have a relatively small income. Contrary to the previous instrument, it is means-tested: to be eligible to the benefit, the income must be below the set minimum level. The minimum amount of the benefit is 7.5 Euros per month, the maximum amount 111 Euros.
- ❖ Social security and health care insurance contributions of family carers, who leave the labour market to help their seriously ill or dependent relatives, are paid by the state. As a result, they would be entitled to relatively small pensions. Only few people use this instrument, especially after the nursing benefit was introduced in 2004 (aimed at those who care for the disabled members of the family, i.e. children).

These instruments do not form a coherent system. The dispersion of public funds allocated to elderly care is one of the main problems, since it ties up the funds, which could be used for helping the truly needy. Moreover, the flow of financial resources is not large enough to foster the development of private providers of (social) care and domestic services and the connections to the qualification system are missing. Also, there is no reliable system of accreditation for firms and quality assurance. One of the main challenges therefore is to create complementary instruments covering these important areas, which have been neglected so far.

Why Is the Time Ripe for Developing an Integrated Concept?

The strategy for developing an integrated concept for the sector of domestic services should take into account following issues:

- ❖ Additional financial resources (both private and public) need to be found to foster the development of the market. Public money should be deployed in such a way, which would induce complementary private spending. This can be achieved either by strong tax incentives or a system involving vouchers. Both instruments would foster the creation of formal employment relationships.

- ❖ A stronger professionalisation of the sector has to take place to make the sector more attractive for investors and employees in the future. Therefore, better education and training opportunities for (potential) domestic workers need to be created as well as a system of validation for previously acquired skills.
- ❖ If considerably more women are required to join the labour force in the next years, to overcome the looming labour shortage, it is important to offer them opportunities for reconciling their family and work.

At least in the field of care, important developments are taking place. The parliamentary working group for the law on dependency, which was already mentioned, has published a Green Book on the long-term care in Poland. They are suggesting a gradual reform of the existing system involving passing the law on dependency risk insurance transferring the financial obligations from the municipal to the national level (2011) and an additional obligatory dependency insurance for the employees (from 2020). The preparations for the first law are at an advanced stage, but the Civic Platform intends to pass both of these laws together. However, this would be possible only after the parliamentary elections in autumn 2011.

The analyses of the situation in the sector of domestic services in Germany, Austria, Italy and Poland provide a framework for systematically capturing the diverse demographic, socio-economic and legislative aspects. It shows how countries interested in fostering the sector of domestic services can go about creating comprehensive strategies. Often, the practical transfer of best-practice examples to other contexts is believed to be problematic, if not impossible. However, if the efforts to learn are not limited to mechanic borrowing, but also include elements of analysis, comparison and abstraction of both the own situation/goals and those of the best practice, the transfer process can be very fruitful. The next chapter will provide an abstract tool supporting the learning and transfer processes by outlining the main elements of the successful strategies and offering concrete advice for tailoring them to the specific needs and frameworks in other countries not involved in the project.

CHAPTER IV

The Generalised Model as a Tool for Creating Custom-Made Integrated Concepts

by Christa Larsen

Based on the activities and analysis of the current situations and future challenges in Germany, Austria, Italy and Poland described above, an abstract integrated concept was developed, which is independent of the conditions in the single national situations. Instead, it is an abstract ideal type or a generalised model for the area of domestic services. This can be used for starting discourses on the development of domestic services also in states, which were not involved in the project. The generalised model can be used as a frame of reference in two different ways: firstly, to carry out an appraisal of the existing instruments and consider their functionality and level of integration in the area of domestic services. Secondly, the integrated model provides impulses for defining the areas and the ways how instruments can be further developed for making progress in the creation of regular jobs in the segment of domestic services.

The Main Elements of the Generalised Model

THE OBJECTIVES

The principal goal of creating regular jobs in private households forms the basis of the generalised model. In order to accomplish this general goal, several sub-goals need to be reached in the domain of the three pillars crucial for the provision and utilisation of domestic services. These are the households which use the services; the employees, who perform the services; as well as the firms, which provide the services and employ and qualify the domestic workers.

With regard to service providers, the sub-goal is concerned with improving efficiency and quality. This means that a higher market transparency can be reached so that the firms can make assessments of the competitive situations. Furthermore, it is important for them to have a sound knowledge of their needs and demands so that they can systematically and efficiently market their services. Since the profit margins in this segment are small, the market entry for firms is difficult. This makes facilitation of market entry necessary. The market also needs to be stabilised so that firms have development perspectives, can establish themselves on the market and can generate profit. This is in close connection with the quality of the services, for which standards are needed. Summed up, a market environment is required, which would enable the service providers to act efficiently and at the same time develop high quality services.

In regard to the employees in the segment of domestic services, the sub-goal is concerned with improving working conditions. Consequently, private households become places of employment with all the associated rights and benefits of a regular job. This also creates employment perspectives with regard to qualification, further training and career development involving systematic development and implementation of these areas.

The sub-goal for the third pillar, the households who use domestic services, is reduction of costs and complexity. Especially in the case of households of the elderly it is necessary to have a high transparency which enables them an overview of relevant services. Moreover, it is important to ensure that domestic services correspond to the needs of the households and are easily accessible. Since the users often belong to vulnerable groups of people it is crucial to provide reliable services of good and transparent quality. Finally, formal jobs in private households can be established only when the households can carry the costs and when they are able to cope with the necessary administrative efforts.

The following table provides an overview of the objectives:

OBJECTIVES		
Creation of Regular Jobs in Private Households		
USERS (private households)	EMPLOYEES	FIRMS (service providers)
Reducing Costs and Complexity	Improving Working Conditions	Improving Efficiency and Quality
<ul style="list-style-type: none"> • Transparency • Availability • Accessibility • Choice • Quality • Reliability • Sustainability • Administrative processing 	<ul style="list-style-type: none"> • Transparency • Professional status • Career prospects • Regular jobs with all the associated rights and benefits 	<ul style="list-style-type: none"> • Transparency • Facilitated market entry • Market stability • Quality • Profit • Development perspectives

Table 1: Objectives for the generalised model of domestic services.

THE INSTRUMENTS

In order to reach the described goals, three groups of instruments are needed. These are: vouchers, tax refunds and reductions as well as subsidised social contributions. All three clusters of instruments should be applied to households, employees and firms, whereby the instruments specified differently, but connected with one another across the pillars.

Vouchers can be used in households in the form of prepaid vouchers. These can be issued by social authorities, insurances, firms or other organisations and replace cash benefits. Vouchers simplify the application and ensure that the funds are used for domestic services. They can be used also in the case of employees. Most often, these are issued as vouchers for acquiring certain qualifications, but they can be also be devised for career guidance services, reduced public transport or child-care (as it is predominantly women who are employed in the sector). Finally, vouchers are relevant also to firms, since they can use them as perquisites for their employees. For firms providing domestic services vouchers are important when these support the process of founding a business or developing an already existing business.

Households can profit from **tax refunds** and reductions in the form of reduced VAT rates for domestic services or when they can write off the expenses on domestic services against the accrued taxes. The latter option, however, has little relevance for the households of the elderly, since often they do not pay any taxes. These households would profit most concepts concentrating on the application of vouchers devised for the needs of these particular target

groups. With regard to the employees in the sector of domestic services a flat-rate income tax would be an important incentive for formal employment in this segment. Tax refunds and reductions are relevant also for firms, especially for those that issue vouchers are prerequisites for their employees. Firms that provide domestic services can be granted sector-specific tax reductions for improving the profit margins with the objective to stabilise the market. Many countries already have experiences with such reductions – however, these are predominantly related to private households which are granted reduced and/or flat-rate tax contributions for domestic helpers directly employed by the households.

Systematic **subsidisation of social contributions** can be used for complementing tax refunds and reductions. When applied to households, such subsidies are the main means of keeping the hourly rates for the provision of domestic services affordable to users. Also for the employees the subsidised social contributions are attractive, since even these low wages can be seen as an opportunity to become more independent of social benefits and can thus be perceived as an incentive to take up formal employment. If also the employers' share of social contributions is subsidised, the impact on the costs for providing domestic services is even more significant.

The success of these three sets of instruments for creating regular jobs is not just dependent on their specification for the needs of the households, employees and firms and their simultaneous horizontal integration. To an even greater degree, the vertical integration of the three instruments in the three pillars is important. Tax incentives and social contributions should be conceptualised in a complementary manner and should be directly connected to the vouchers. For example, services which are paid for with vouchers could be supported by tax reductions and subsidies covering social contributions. These instruments show that subsidies which are applied simultaneously in different areas of the segment foster the chances to develop a sustainable segment of domestic services.

Besides the already mentioned instruments, additional instruments are needed for each pillar in order to reach the goals. For the pillar of households, instruments should be developed which enable a simplified processing, for example with the help of a service cheque. In regard to the employees, coherent and binding instruments for assessment and certification of qualifications are needed. Closely connected to this are accreditation procedures for firms providing domestic services.

The following table gives an overview of the described instruments and their application in the three pillars.

INSTRUMENTS		
USERS (private households)	EMPLOYEES	FIRMS (service providers)
Reducing Costs and Complexity	Improving Working Conditions	Improving Efficiency and Quality
<ul style="list-style-type: none"> • Vouchers • Tax refunds and tax reductions • Subsidised social contributions • Simplified processing (service cheque) 	<ul style="list-style-type: none"> • Vouchers • Tax reductions • Subsidised social contributions • Assessment and certification of qualification 	<ul style="list-style-type: none"> • Vouchers • Tax reductions, tax refunds • Subsidised social contributions • Accreditation • Horizontal and vertical integration
Horizontal and vertical integration		

Table 2: Relevant instruments in the generalised model of domestic services.

THE ORGANISATIONS

In order to apply the wide range of described instruments in an integrated concept and ensure their targeted and systematic governance, different organisations need to be incorporated in the model. The following table gives an overview of the types of organisations relevant to the generalised model:

ORGANISATIONS		
USERS (private households)	EMPLOYEES	FIRMS (service providers)
Reducing Costs and Complexity	Improving Working Conditions	Improving Efficiency and Quality
<ul style="list-style-type: none"> • Banks • Financial authority • Social insurances • Private insurances • Social administrations • Firms (issuing vouchers) • Organisations for governance and control 	<ul style="list-style-type: none"> • Placement offices • Labour administration • Providers of training and education • Public administrations • Social partners • Organisations for governance and control 	<ul style="list-style-type: none"> • Associations of service providers • Financial authorities • Social insurances • Labour administration/ placement firms • Social partners • Banks • Organisations for governance and control
Horizontal integration		

Table 3: Relevant organisations in the generalised model of domestic services

Especially in strongly federalist countries the development of a governance model needs special attention, because the modes of governance and the scope of different levels need to be taken into account. Based on the French experience, the establishment of a national agency is particularly promising. There, L'Agence nationale des services à la personne is an actor with definatory powers over all processes in the segment and simultaneously assumes centrally organised governance functions. In states with less centralistic structures representative offices on subordinate territorial levels can be potentially helpful.

How to Apply the Generalised Model?

States can use the generalised model outlined here as a frame of reference for developing their own strategies. As already illustrated in the case of Germany, Austria, Italy and Poland, it can be expected that different discourses and actions will be developed. This depends on the different types of social systems, economic situations, different political cultures and development paths. Against this background, a supranational actor either on the European or international level is needed who would systematically unite different strategies and the associated experiences. This is an important precondition and the basis for defining consistent Europe-wide and world-wide framework conditions

CHAPTER V

Perspectives for Strategic Developments in the Domestic Services Sector

by Sigrid Rand and Christa Larsen

Among all EU Member States there is a consensus that their welfare systems need to be adjusted to the challenges posed by socio-economic and demographic changes such as ageing population, increasing number of elderly people living on their own and growing participation of women in the labour force. Simultaneously, the majority of these countries face the situation where they need to create more employment opportunities for groups on the fringes of the labour market to ensure their social inclusion. Some countries have recognised that their (social) care systems for the elderly are too fragmented and inflexible to allow for innovative and comprehensive solutions to these manifold challenges. Therefore, they see the necessity of creating new integrated concepts not only to ensure the provision of accountable and affordable (social) care services to the elderly, but also to foster the development of the domestic services sector as a new and promising sector of employment. Germany and Poland, for example, have seized the initiative, whilst others have adopted a wait-and-see attitude. How could policy-makers in EU Member States initiate discourses on the goals of the reform processes and which steps would need to be taken to create strategies leading to the development of an integrated system of domestic services?

As demonstrated in this brochure, it is essential to analyse successful models. In the case of domestic services sector, the French Borloo-plan was clearly the best practice example to that end, since it demonstrates how an inclusive and integrated strategy makes it possible to tackle several related problems at the same time. The French policy-makers did not just address the bottlenecks in the provision of domestic services, but also created significant numbers of employment relationships subject to social contributions. Indeed, the French policy-makers can pride themselves on impressive figures documenting the results of the successful strategy: within five years, 500,000 new formal employment relationships in private households were created and the share of informal employment in the sector was reduced by 70 per cent.

The case studies from Germany, Austria, Italy and Poland show that the prerequisite for the integrated strategy is a close analysis of the current situation including the main challenges faced by the social welfare system, the involved stakeholders and their interests as well as the existing instruments. Based on this information the focus of the strategy can be developed and the possible ways to modify the existing instruments or involve the relevant stakeholders can be explored. Only then, measures complementing the existing structures and instruments can be devised. Supported by these insights, the Generalised Model for the provision of domestic services and creation of formal employment offers a tool also for other states who would like to learn

from the French experience. It is an abstract model specifying the instruments, involved stakeholders and governance structures needed for strategically creating an integrated approach in accordance with the main challenges faced by the social welfare system in question as well as with the already existing framework conditions and instruments. Additionally, it demonstrates how labour market and qualification policies especially for groups on the fringes of the labour market can be aligned with the strategy.

Whilst the national initiatives have to be seen as a considerable progress on the path of developing the domestic services sector for fostering the creation of formal employment, an aligned strategy of EU Member States would render the different processes even more successful. The possible starting points could be already existing initiatives and guidelines of the European Union. However, coordinated action by key actors on the EU level, such as the European Parliament (including all its relevant parliamentary committees), the European Commission and the European Economic and Social Committee, would give dynamic impulses to the processes on the national level. A Green Book for Domestic Workers (similar to the Green Book for Health Professionals dating from 2008) would offer a frame of reference to all stakeholders on the EU and national level. For reaching the common goals of all EU Member States, the Open Method of Coordination would be a suitable instrument. Once the general frame of reference has been defined, important actors on the EU level can follow with their own initiatives. For example, considering the crucial role of education and training of the potential employees in the domestic services sector, Cedefop could be one of the key actors for fostering the professionalisation of the sector. Thus, the National Qualification Frameworks could be used for defining qualification standards for domestic workers or harmonising the national curricula for those professions. It would entail specifying different levels in the Framework to the occupational requirements of domestic workers. As a result, this approach would contribute to the professionalisation of domestic workers and increase their employability. Similarly, the process of qualification standard-setting could be tied in with defining quality standards for the providers of domestic services.

Furthermore, it would be important to incorporate the impulses from the International Labour Organisation in such an integrated strategy. It would help the EU Member States with the swift implementation of the new labour standards for domestic workers and thus ensure compliance with up-to date international norms and standards.

Finally, it would be essential to enable the EU Member States to exchange information, experiences and best practices of creating their strategies. It could expedite the process and open broader horizons to the national policy-makers in regard to flexible and innovative solutions. Domestic services is a field with many unexplored opportunities and it should be in the best interest of us all to turn it into an occupational field with real chances of professionalisation and career development for those employed in the sector. Without doubt, it would profit not only the users, the employees and the services providers, but also offer modern solutions to some of the vexing problems faced by our societies.

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The project "Labour Market Measures for Reducing Illegal Employment in Private Households of the Elderly" brought together researchers of international renown from four European countries. They represented Germany, Italy, Austria and Poland and worked on case studies related to their respective countries. Additionally, they developed together a Generalised Model to further regular employment in the segment of domestic services in all European Member States. The research team was supported by two representatives from the political administration of the Federal State of Hesse in Germany. Their task was to explore the possibilities of transferring the research findings into political discourses as well as to suggest different ways of applying the insights in the political context.

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This report was prepared by all project partners. The Project Manager Christa Larsen is responsible for the content and press information. Further information on the project can be obtained on the project website: www.iwak-frankfurt/domesticervices.htm.

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