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# Ireland's paternity benefit: belated social investment

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Abstract:

Ireland used to be a laggard in implementing social investment policies, but has caught up in the last decade with early childhood education (2009), active labour market policies (2012) and paid parental leave (2016). This article briefly evaluates the introduction of the paternity benefit and its effects. Three different rates to measure take-up are discussed critically. Overall, take-up is relatively high and achieves Nordic standards, although for a shorter duration. However, occupational and class inequalities emerge as only about 50 percent of the male workforce have access to occupational paternity benefit to top-up to the relative low statutory benefit. The paper concludes that nowadays Ireland has key social investment policies in place, but on a low statutory benefit level. These schemes can be the springboard for further expansion such as shared parental leave, more generous net replacement rates and longer duration. Yet, with Brexit Ireland is the only liberal welfare state left in the European Union and it remains to be seen if it follows the continental and Scandinavian model or seeks new alliances to create a liberal version of social investment.

**Ireland's paternity benefit: belated social investment**

Ireland has been late in embracing the social investment strategy. As a liberal – almost radical – welfare state within Europe, the Irish welfare state has a strong element of family-related benefits, relies on redistribution via income tax and housing wealth is a major element of income protection as well as redistribution (NESC, 2005; Norris, 2016). Within the Irish welfare system traditional social protection schemes dominated, with little social service development. Up until the mid 2000s "patriarchal-familism perspectives" (Rush, 2011) dominated the domestic, US influence, discourse on fatherhood. Despite several reports and public debates on activation and social investment internationally hardly any reforms were introduced in Ireland. While the rest of Europe embraced the social investment agenda (Van Kersbergen and Hemerijck, 2012), Ireland remained a laggard. Prior to the crisis, the only major social investment reform was the introduction of three hours free early childhood education for 3-year olds in 2009. By Irish standards this was a major move towards social investment. Despite the half day education, this new policy fell short of providing childcare for full-time working parents and rather resembles early childhood education without care. Yet, around this time most European countries had much further developed integration of formal education and full-time care for this age cohort. We can observe a similar late adaptation in labour market activation policies. Although activation reforms were on the policy agenda since 2006, the crisis accelerated the introduction of integrated activation measures and a one-stop shop for jobseekers in 2012 (Author 1; O'Connell, 2017). Within this context of adopting some key social investment policies, Ireland lacked any paid parental or paternity leave until September 2016.

This European Briefing discusses the introduction of the Irish Paternity Benefit and evaluates early policy effects. In the Irish context the focus is on the paid paternity benefit and not the unpaid paternity leave, while the international literature would refer to paternity or parental leave more general as paid leave. First, the key policy design and eligibility criteria will be lined out briefly, including the emerging occupational inequalities. Similar to the United Kingdom (Wiß and Greve, 2019) some employers top up the flat rate statutory benefit, often at the full salary. Second, this briefing will assess the emerging – and scattered – data on take-up and the age profile of claimants.

Finally, I will draw wider conclusions what these early effects suggest for the emerging social investment state in Ireland and current European Union policy development in the area of work-life balance. A particular focus will be on the effects of Brexit, when Ireland is the only liberal welfare state left in the European Union.

**Paternity Benefit**

The Paternity Benefit was announced with the Budget 2016 in October 2015 (DSP, 2015). The original proposal of two weeks leave at the rate of €230 per week had been implemented in September 2016. The rate and eligibility criteria are the same as for the maternity benefit: In general, employees require 39 weeks of social contributions, while self-employed are eligible after 52 weeks of contributions, and leave has to be taken within six months after the child's birth (for details see Daly and Rush, 2018).

According to a survey among almost 400 private companies (Ibec Research Unit, 2016), about 37% top-up the statutory paternity benefit. Yet, there is large variation among employers and sectors. Overall, larger and foreign-owned companies in the urban centres are more likely to offer top-ups. The concentration of top-ups in larger companies means more than 37% of employees will be eligible to occupational top-ups, but precise estimates on the covered employees are not available. Moreover, about 61% of financial service and 75 % of telecom companies offer a top-up, compared to only 27% of retail companies, which creates sectoral inequalities. Most of these companies replace the full wage (67%) for the statutory period (68%), while others offer lower replacement rates or a shorter duration (mostly less than a week). Eligibility criteria vary also considerably between no minimum service required (34%), 6 months (12%) or 12 months (30%) and other (24%). There is also variation within the public sector. All civil servants are entitled to full pay during the two weeks leave, which also extends to large public sector employers like universities and semi-state bodies. Still, Ireland has a relative large voluntary sector of smaller organisations that depend on public funds, but we have no information about leave entitlements there. In sum, a little more than 50 percent of the workforce should have access to occupational parental leave, compromised of at least 37% in the private sector and about 15-17% in the public sector.

When the paternity benefit bill was presented to parliament (*Daíl*), the deputy prime minister (*Tánaste*) Frances Fitzgerald contextualised the policy within a social investment frame when she stated: “Consistent findings show that targeting investment in a child’s early years leads to better outcomes for both the child and wider society” (DSP, 2016). More specifically, with the introduction of the paternity leave and benefit four main policy aims are associated (Department of Justice and Equality, 2016):

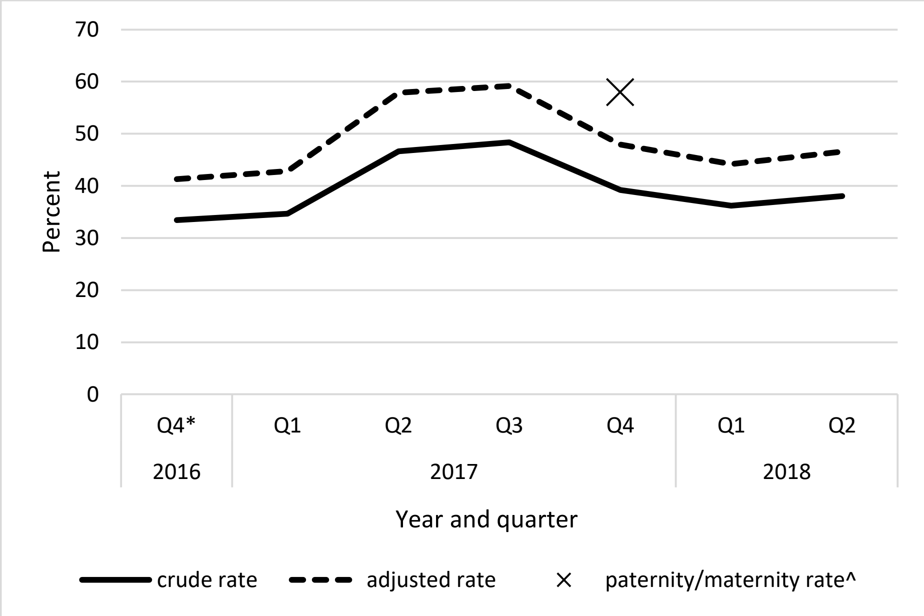
1. The DSP estimates about 30-40,000 claimants per annum, which would resemble a take-up rate of about 48-64% among all fathers.
2. Align leave policy to similar standards as in other EU countries.
3. More fair sharing for care responsibilities and increased participation of men in child-rearing.
4. Improve work-life balance.

At this stage of the implementation we have only reliable data on the aims 1 and 2 and some information about 3, therefore the following analysis will concentrate on these.

**Low take-up and traditional roles**

In the national press and to some extent also in academia (Daly and Rush, 2018) the introduction of the paternity benefit had been hailed as a huge success. Total claimant numbers were increasing up to the third quarter in 2017, but an official claimant rate has never been published. Figure 1 depicts a crude claimant rate per number of births and would confirm the overall increase until mid 2017, reaching almost a 50 percent take-up rate. Since then the rate dropped to 36% in the first quarter of 2018 and shows a slight recovery in the second quarter.

Figure 1: paternity benefit take-up rates by quarter




Source: (CSO, 2019; DEASP, 2018)

Notes: own calculation. crude rate = Claimants / Number of births. Adjusted rate = claimants / (employment rate * number of births). *Q4 2016 includes September claimants. Paternity/maternity rate = PB claimants / MB claimants. ^paternity/maternity rate refers to year 2017.

Overall, this suggests an average take-up of 40% across the observation period, about 8 percentage points below the lower target of 30,000 total claimants. We know from other countries (inter alia Ekberg et al., 2013) that fathers are more likely to take their leave during summer and Christmas holidays and we seem to observe a similar seasonal variation in Ireland. Still it means that 60% are not taking leave, for a reasonable short period of time. Several reasons for this relative low take-up can be identified.

First, the crude take-up rate does not take account for the eligibility of fathers. On average the male employment rate (20-49 year old) has been at 81 % for the observation period. Adjusting for this would increase the average take-up rate to about 49% (figure 1).

Second, although self-employed workers are eligible, they face stronger challenges to take time off from work. They might lose clients and contracts and would only receive the statutory benefit. Considering that Ireland has a relative high self-employment rate of about 15%, this reduces the pool of fathers that can take leave without direct financial consequences.

An alternative indicator to calculate take-up is the share of paternity claims of all maternity claims, which was at 58% in 2017 (Daly and Rush, 2018). This rate would reflect overall eligibility in context of the female take-up, but still means that about 40% of fathers are not taking leave.

Third, the low flat rate benefit is not attractive for medium- and high-income earners that have no occupational top-up as the statutory benefit only replaces about 53% of average net income (reference year 2010, SOFI, 2015).

In sum, we can observe a take-up rate between 40 to 60 percent, depending on the used measure. This rate is close to the share of fathers that would be eligible for occupational top-ups. The relative high non-take up displays early signs of several policy shortcomings and little change in gendered caring roles. So how does this compare to other liberal (UK), conservative (Germany) and social democratic (Sweden) welfare regimes? All three countries offer shared paid parental leave, but the following discussion focusses on the reserved paid leave for fathers, which is most similar to the Irish paternity benefit.

The UK has a similar paid paternity leave (paternity pay) since 2003, but at a lower net replacement rate of about 35% in 2010 (for details see O'Brien and Koslowski, 2017). Although official statistics are not published, survey estimates suggest that between 74% in 2009 (O'Brien and Koslowski, 2017) and 65% in 2011 (Koslowski and Kadar-Satat, 2019) of all fathers take paternity pay (crude rate). Own – though limited – estimations of the crude rate based on official budget expenditure data suggest that take-up increased from about 30 to 40 percent between 2004 and 2017.[1] Yet, eligibility criteria in the UK are much more restrictive than in Ireland and would exclude self-employed fathers and fathers who changed their job in the past 6 months, who amount together to about a fifth of the workforce (TUC, 2016).

Both Sweden and Germany have a non-transferable paid paternity leave entitlement of 2 months on top of shared parental leave at a net replacement rate of about 72% in 2010 (SOFI, 2015). In addition to the statutory leave, almost all Swedish fathers have access to occupational top-ups that replace about 90% of the wage in the first 30 or 60 days (Sjögren Lindquist and Wadensjö, 2006), while those schemes are not existing in Germany. In 2002 about 42% of all Swedish fathers took leave (crude rate, Sjögren Lindquist and Wadensjö, 2006: 217). When Sweden introduced the so-called ‘daddy quota’ in 1995 (Duvander et al., 2005; Author 2), take-up was at about 70% of all eligible fathers after two years (p/m rate). The benefit can be taken up to the 8th birthday, but after two years 71% of fathers took at least 1-29 days off and 54% took the full daddy quota of 2 months in 2009 (Försäkringskassan, 2012: 49). Since 1995 the non-take up has changed little, but fathers take longer leave nowadays (Försäkringskassan, 2012). On the contrary, only about 19% of German fathers took paternity leave in 2008 and the take-up has gradually increased to 36% in 2015 (crude rate, Destatis, 2019), despite the same generous net replacement rate as Sweden.

As different take-up rates are used in these countries it is difficult to compare and contextualise Ireland. Compared to the UK survey estimates of 65-74%, the Irish take-up rate is rather low. One reason could be that 73% of private companies replace the full wage for the two weeks of paternity leave (Wiß and Greve, 2019), which makes it financially very attractive to take leave. Overtime the take-up in the UK also increases by 10 percentage points without much policy change, which means that the Irish rate might also increase in the long-term. However, due to the limited validity of the UK estimations of the crude rate (see endnote 1), further research is required to confirm the level and trend observed.

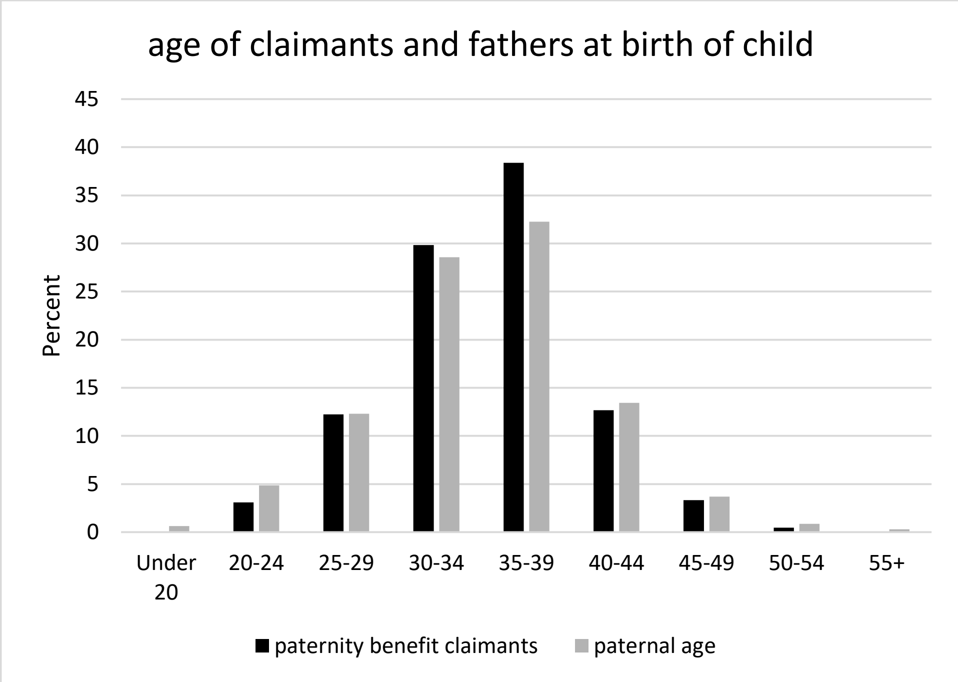
Interestingly, the Irish rate of eligible fathers (58%) is close to the Swedish rate after two years (p/m rate) and the overall take-up is only slightly lower (crude rate), but Swedish fathers take longer leave. With hindsight we also have to acknowledge that the Swedish take-up rate increases to 88% after 8 years, which means there is a gap of 30 percentage points among eligible fathers compared to Ireland.

Irish fathers are certainly embracing parental leave more eagerly than German fathers. Again, details in the policy design could be a reason for this. While single days of the leave can be taken in Ireland and Sweden (and single weeks in the UK), parental leave in Germany can only be taken in periods of full months. It might be feasible to take off a few days or weeks without diminishing career opportunities in traditional male dominated occupations, but one or two full months might pose a stronger challenge to traditional paternal roles. Moreover, German fathers have no access to occupational top-ups and leaves many with a much lower combined net replacement rate than in the other three countries. The inflexibility around the duration of leave amplifies the financial disadvantage when they have to take at least a month leave instead of a few days.

Figure 2 displays the age of claimants and all fathers in 2017. The claimant figure is limited in its representativeness as it refers to current recipients on the 31 December 2017. In other words, it only shows a fraction of claimants in a period when more fathers take leave (Ekberg et al., 2013), and we have to assume that the father's age is normally distributed across the year. Yet, this is the only official socio-demographic breakdown of claimants provided by the Department.

First, the overall age profile indicates that fathers 40 years and older have a lower uptake than those in the 25-39 age brackets. Older fathers might hold on to more traditional roles, while fathers in the middle age brackets seem to take on new caring roles. Second, claimants 24 years and younger are underrepresented. These fathers might not have built up sufficient social contributions to claim paternity benefit. However, without further research, we can only speculate about the reasons for these variations in take-up. Since the aggregate age distributions are highly correlated ($p = 0.99$), it would suggest that the observed percentage point differences are not significant. Further micro data analysis would be required to assess how age effects the take-up.

Figure 2: Age of claimants and fathers at birth of child, 2017




Source: (CSO, 2018; DEASP, 2018)

Notes: Own calculation. Paternal age: Fathers age unknown not displayed (3%), N=62,053. Claimants: recipients on 31 Dec 2017, N=875, No claimants under 20 and 55+ reported.

**Conclusions**

Considering the four key government aims, the introduced paternity benefit was relative successful. In summer 2016 almost all EU member states offered some kind of paid parental or paternity benefit (European Commission, 2019). With the duration of 14 days Ireland caught up to the median of 13 days of paternity benefit, but the average is slightly higher at 18 days. Nevertheless, most countries offer higher statutory replacement rates and a longer duration, when paid parental leave is considered.

In 2017 the European Commission also started a new initiative to review and strengthen existing work-life balance policies (EC, 2017). The current compromise proposal from February 2019 (GEDA/A/(2019)001488), scheduled for the first reading in the EU Parliament in April 2019, would enshrine a non-transferable paid paternity leave of 10 working days at the rate of statutory sick pay into EU law to increase fathers' involvement in childcare. It would set the current Irish level as the EU minimum standard, leaving Irish social protection again at the bottom of the EU table.

The original proposal of the European Commission also suggested to introduce 4 months parental leave paid at the level of sick pay. In anticipation of this forthcoming EU legislation the Irish government announced two weeks of paid parental leave for each parent in November 2018. Yet, the EU compromise three months later (February 2019) offers a much longer paid parental leave of 2 months. At this stage, Ireland is one of the few countries without paid parental leave and the current government proposal trails behind the duration that has already been agreed on the EU level. If the EU directive is enacted this year, Ireland would again be a latecomer that only implements the minimum EU standard.

Although the new proposal will enable parents to share leave more equally and for a longer duration, the issue of rather modest statutory net replacement rates in Ireland remains and will deter fathers on medium to higher incomes.

The second aim was to achieve at least a take-up rate of 48 percent. Although the take-up rate remained below the government target and declined in 2018, the average rate is high and comparable to countries with longer established paternity leave schemes. Most impressive is that Irish fathers are taking leave at the same rate as Swedish fathers, who had culturalised daddy-quotas and shared parenting roles much longer. Yet, the comparison to the UK also indicates that high net replacement rates are a crucial incentive to increase the take-up rate. Also flexible leave by days, rather than months, might be have a positive effect on take-up. The current arrangement of statutory flat rate benefits and occupational top-ups contributes to occupational and class inequalities. Employees in larger companies and the public sector, often associated with a higher qualified workforce, benefit from these fringe benefits, while working class employees and self-employed are left out. Finally, the age profile revealed that older fathers seem to stick to traditional caring roles and younger fathers seem to be not eligible for the benefit. In particular the latter group could benefit from a flat rate benefit that also considers periods of full-time education for eligibility.

In a short period of time, the Irish government caught up on the social investment agenda and Irish fathers are challenging traditional caring roles, at least for two weeks. Within the last decade Ireland moved from having no social investment policies towards implementing minimum standards that had been common in European members states much longer (ECCE

2009, ALMP 2012, PB 2016). In contrast to the US-American influenced traditional Irish perceptions of fatherhood between 1970 and the mid 2000s (see Rush, 2011), Ireland moved closer towards a Swedish ideal of gender equality and shared parenting. The example of paternity benefit shows that the catch up with the European minimum can be the springboard for a further expansion as the proposal for parental leave underscores. While the social protection schemes are updated, the social service provision still lags behind. Irish childcare is one of the most expensive in the OECD and enrolment rates for 0-3 year olds are below the Barcelona targets. Long-term care provision relies heavily on private means to pay and informal care. Limited child and elderly care services contribute to a relative low female labour force participation and further service investment would be needed to truly move towards an integrated and coordinated social investment welfare state.

In a way Brexit will intensify pressure on Ireland to orient towards the more generous European states if it competes with social democratic or conservative welfare states for labour. In the past, Ireland could act in tandem with the UK to obstruct tighter labour market regulation and more generous minimum social standards. Some Eastern European countries are new likely partners that would favour more liberal labour market regimes or traditional family-related benefits (e.g. Poland, Hungary), but this trajectory would not be reflected in the more secular and progressive younger generations that voted for marriage equality (2015) and abortion (2018). So far, Ireland has introduced the basic policies for a social investment state that can be further expanded in duration and better paid leave for all. This will also create new distributional conflicts around the traditional social protection schemes like pensions, considering that Ireland still has a relative high fertility rate and young demographic profile.

This short European Briefing suggested some measures to evaluate the take-up of the paternity benefit, but also highlighted the data gaps. The European directive would also require member states to report "aggregated data on the take-up of leaves" (GEDA/A/(2019)001488), which might reduce some of the discussed limitations when comparing take-up rates. As shown, aggregate figures can give an indication about the age profile of claimants, although more in-depth analysis could in theory disaggregate by occupation and income as this information would be available when calculating eligibility.

Moreover, social survey data is limited. The Quarterly National Household Survey (QNHS) and Labour Force Survey (LFS) ask explicitly for the reason for being off work in the last week. Due to the short duration of only two weeks, one would need relative large samples to record the low incidence of taking paternity leave. In a sample of about 30,000 respondents, one would expect about 14 cases of eligible fathers per week. The QNHS had a sample size of about 35,000, but it had been discontinued after Q2 of 2017. Overtime, the sample size of the LFS will increase from about 13,000 (2017) to about 32,500 (2018), which makes it difficult to study the social profile of fathers taking leave at the introduction period. Moreover, the current questionnaire only allows to measure take-up. Other questions are not suitable to capture more in-depth information about duration as follow-up questions assume being at least 1 or 6 months off work, in reflection of longer maternity or parental leave cover. These survey tools should be adjusted for the shorter duration of paternity leave to capture also those fathers that might only take a week off, instead of the full two weeks. Finally, the information about the occupational benefits is scattered and often not available to the public or researchers. In order to fully assess the effects of paternity leave and benefit on changing caring roles and a better life-work balance, the available data infrastructure has to improve.

**Endnotes**

[1] These estimations are based on several assumptions and therefore have limited validity. The number of claimants is derived from expenditure data (DWP, 2018), which includes Paternity, Parental and Adoption Pay, but the assumption is that the paternity pay is paid for the full 2 weeks and few fathers take extended leave. The claimant formula is as follows: expenditure / (2 * weekly rate). The crude rate is then calculated as per figure 1. The claimant numbers – and the resulting take-up rate – are prone to under- and overestimation, but the effect cannot be quantified. First, the formula underestimates the duration for parental leave and also includes Adoption Pay, which means claimant numbers are inflated by fathers who take longer leave. Second, about half of employers are not reimbursing their costs for the relative low and short statutory payment (Burgess and Davies, 2017: 30), which would underestimate the actual take-up. A further limitation is that the annual live births refer to the calendar year (Eurostat, 2019), while expenditure data refers to the fiscal year which runs from April to March.

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