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gender and welfare state regimes

Edited by

Diane Sainsbury





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UNIVERSITY PRESS

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Great Clarendon Street, Oxford OX2 6DP

Oxford University Press is a department of the University of Oxford.
It furthers the University's objective of excellence in research, scholarship,
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New Delhi Shanghai Taipei Toronto

With offices in

Argentina Austria Brazil Chile Czech Republic France Greece

Guatemala Hungary Italy Japan South Korea Poland Portugal

Singapore Switzerland Thailand Turkey Ukraine Vietnam

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Published in the United States
by Oxford University Press Inc., New York

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Reprinted 2009

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ISBN 978-0-19-829416-0

Printed in the United Kingdom by
Lightning Source UK Ltd., Milton Keynes

❖ Gender and Welfare State Regimes

Gender and Politics represents the most recent scholarship in the areas of women, gender, and politics, and is explicitly cross-national in its organization and orientation. Recognizing the contribution of women's studies to gendered political analysis, the goal of *Gender and Politics* is to develop, and to publish, frontier analysis, the empirical research exemplary of the intersection between political studies and women's studies.

The series is edited by Professor Karen Beckwith at the Department of Political Science, College of Wooster and Professor Joni Lovenduski, Department of Politics, University of Southampton.

❖ Acknowledgements

This book grew out of a set of papers presented at a panel on 'Gender Inequality across Welfare State Regimes' at the 1996 Annual Meeting of the American Political Science Association. The editor and authors of the first four chapters are grateful to the two panel discussants, Wendy Sarvasy and Tim Tilton, for their comments. We would also like to thank the two series editors, Karen Beckwith and Joni Lovenduski, for their strong support of this project. At a formative stage of the volume, the referees of Oxford University Press offered useful comments that strengthened the design of the book. In particular, the editor is thankful to Leslie Eliason for her constructive suggestions. A final word of thanks is owed to Robert Brewster for technical assistance and moral support.

❖ Abbreviations

ABS	Australian Bureau of Statistics
ATP	Allmän tilläggspension (General Supplementary Pension)
AWBZ	Algemene Wet Bijondere Ziektekosten (Exceptional Medical Expenses Act)
CPSI	Central Pension Security Institution
DIR	Department of Industrial Relations
EEOC	Equal Employment Opportunities Commission
EOC	Equal Opportunitites Commission
EU	European Union
ILO	International Labour Organization
Istat	Istituto Nazionale di Statistica
LIS	Luxembourg Income Study
NOSOSKO	Nordic Committee of Social Statistics
NWO	Netherlands Organization for Scientific Research
OECD	Organization of Economic Cooperation and Development
OLS	ordinary least squares
PPPS	Purchasing Power parties
REOB	Foundation for Law and Government
RFV	National Social Insurance Board (Stockholm)
SCIP	Social Citizenship Indicator Program
SD	Statistics Denmark
SII	Social Insurance Institution
SYF	<i>Statistical Yearbook of Finland</i>
TAFE	technical and further education
UN	United Nations
WLS	weighted least squares

❖ Notes on Contributors

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❖ Introduction

Diane Sainsbury

The past decade has witnessed an exciting reorientation in welfare state research. The gender division of welfare, previously a neglected area of study in comparative scholarship, is currently a major focus of interest. Crucial to this reorientation have been feminist critiques of mainstream analyses of welfare states and the combining of feminist and comparative perspectives.

This reorientation has shed new light on the dynamics between gender and welfare state policies. First, earlier feminist theorizing and research on women and the welfare state were usually set in a specific national context. This limitation influenced theories and empirical understandings because they were based on invariance and a tendency to generalize on the basis of a single country's experiences. Comparative feminist studies have pointed to the diversity in welfare state policy outcomes (Leira 1992; Lewis 1993; Sainsbury 1994*b*, 1996; O'Connor *et al.* 1999) and multiple forms of women's politics (Katzenstein and Mueller 1987; Randall 1987; Chamberlayne 1993; Nelson and Chowdhury 1994; Ferree and Martin 1995).

Secondly, focusing on the quality of social rights, feminists have theorized that the principles of entitlement are decisive as to whether policies reinforce existing gender relations or transform them. The bases of entitlement differ in their emancipatory or regulatory potential for women. Again this contrasts with earlier feminist research, which stressed social control and the regulatory nature of welfare state policies. Feminist scholars have also expanded the sphere of rights by considering personhood and bodily integrity (Shaver 1993/4).

Perhaps the most important contribution has been to suggest how to bring gender into the comparative analysis of welfare states and social citizenship. As aptly put by Julia S. O'Connor (1996: 104), 'there has been a major shift in emphasis from making women in welfare states visible in the

analysis to gender as a dimension of the analysis'. In gendering welfare states, feminist scholars have proceeded in various ways and produced different analytical frameworks (for overviews, see Gornick 1995, O'Connor 1996, and Orloff 1996).

At least two broad alternative approaches have emerged from these efforts. The first approach has been to build gender into mainstream theoretical frameworks. This has been done by reconstructing the core ideas and key analytical categories so that they include gender. A major rationale for this strategy has been that 'feminist research can thereby incorporate advances in the mainstream literature while transforming it to incorporate gender relations' (Orloff 1993: 305). The second approach holds that mainstream theories are fundamentally lacking, and new frameworks and models must be formulated. Proponents of this approach warn against a strategy that merely adds on women to frameworks where the male is the norm (Lewis and Ostner 1991, 1994; Lewis 1992; Sainsbury 1994a).

Each of these approaches has its strengths and weaknesses, but they largely complement each other. Although it may be useful, especially initially, to separate out gender because it focuses on facets omitted in mainstream analysis, such an approach is incomplete. It is necessary to examine the interplay between gender-relevant dimensions of variation with those identified as important by the mainstream literature. By contrast, building gender into mainstream frameworks retains their insights. A drawback is the potential difficulty of distinguishing between the influences of gender relations and other determinants of welfare state policies when feminist and mainstream perspectives are compounded in single ideal types or policy regimes. This strategy may also inadvertently incorporate the shortcomings of mainstream frameworks.

Feminist scholars have differed in their strategies of enquiry, but an underlying concern in feminist comparative research has been the conceptualization of gender-relevant dimensions of variation. One major thrust has been to incorporate gender in the welfare state regime concept, taking Gøsta Esping-Andersen's three dimensions of variation as a starting point (O'Connor 1993, 1996; Orloff 1993). The dimensions in his scheme are: the nexus of the state and market in the distribution system, the quality of social rights as reflected in decommodification, and the stratifying effects of welfare entitlements.

Ann Orloff's framework (1993) represents the most systematic effort to build gender into the welfare state regime concept. First, rather than taking the nexus between the market and the state, Orloff refashions this dimension of variation as *state, market, and family relations*. This modification recognizes the family and women's unpaid work as a variation in social provision. Her second dimension is the pattern of *gender*

stratification produced by entitlements. She distinguishes between gender differentiation and gender inequality. Gender differentiation in entitlements occurs when claims to benefits are based on the traditional division of labour between the sexes. Men receive benefits as family providers and workers, while women claim benefits as wives and mothers. Gender inequality refers to differences in the benefit levels of women and men, which is often affected by gender differentiation. Benefits tied to participation in the workforce are usually more generous than benefits claimed on the basis of wifely or motherly labour.

Orloff adds two new dimensions of variation to decommodification—the key indicator of the quality of social rights in Esping-Andersen's analytical scheme. Decommodification, the ability to maintain a livelihood without reliance on the market (Esping-Andersen 1990: 22), presupposes social rights based on labour-market participation. This supposition is problematic, because many women work in the home. It is also problematic because employment provides a source of independent income for women and can alter their dependency within the family. To eliminate these difficulties Orloff proposes *access to paid work* as her third dimension. The fourth dimension of her framework is *the capacity to form and maintain an autonomous household*. This dimension parallels decommodification, which frees wage-earners from the dictates of the market. The ability to form and maintain an autonomous household frees women from the necessity to marry to gain access to a breadwinner's income in order to survive and support their children.

Other scholars have highlighted gender in isolation from mainstream theoretical frameworks. Jane Lewis, together with Ilona Ostner, have taken the breadwinner model as a point of departure (Lewis and Ostner 1991, 1994; Lewis 1992). They devise an alternative categorization of welfare state regimes based on the gender division of labour that prescribes breadwinning for men and homemaking/caring for women. In constructing their typology, Lewis and Ostner focus on how women are treated in the social-security system, the level of social-service provision, particularly childcare, and married women's position in the labour market. They distinguish between the strong, the moderate, and the weak male-breadwinner model or the dual-breadwinner model.

Drawing upon the feminist critique of mainstream welfare state research, Diane Sainsbury has outlined gender models of social policy (1994a, 1996). Her strategy has been to recast the generalizations of the feminist critique into dimensions of variation, constructing two contrasting ideal types: the male-breadwinner and the individual models. The dimensions of this scheme are largely a specification of the state-market-family relations and the stratification dimensions, but Sainsbury