

Class Meets Gender in Comparative Social Policy

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This article was one of several commentaries on papers by Walter Korpi and Joan Acker that appeared in *Social Politics* in Summer 2000

Beyond the conviction that inequality is to a large extent politically constructed—whether by practices and processes inside organizations (Acker) or by political parties in the making of public policy (Korpi)—the articles on which I have been asked to comment share little common ground. Whereas Acker's unit of analysis is the organization, Korpi's interest is in comparing the macro-properties of whole societies. And while Acker's strategic goal is to suggest ways of thinking about complex individual cases, Korpi seeks to formulate generalizations based on empirical regularities across cases. Very occasionally the two authors briefly connect, as when Acker both invokes and extends vintage Korpi in commenting (p.17 [typescript pagination]) that due to the relative weakness of the labor movement in the USA, inequality in the realm of class is more legitimate than in relation to race and gender. More typically, Acker offers concepts and illustrations designed to express how class and gender are "complexly related aspects of the same ongoing practical activities" (p.17 [typescript pagination]). Korpi stops far short of such a radically integrative project. His goal is to modify both the dependent and independent variables of comparative welfare state research in order to incorporate gender alongside our existing understanding of class.

Being much closer to Korpi's research program than Acker's, I am going to devote the rest of this essay to some observations on how he treats the project of bringing gender into comparative welfare state research. These observations will pay particular attention to how Korpi's attempt to integrate gender-related concerns compares with some related undertakings, principally Gosta Esping-Andersen's *Social Foundations of Postindustrial Economies* (Esping-Andersen 1999). But first, by way of introduction, it is worth pointing out that both Korpi's and Acker's contributions to this issue of *Social Politics* raise a perennial question in the sociology of gender: How ought we to understand the relationship between social stratification based on sex differences and other social cleavages? The problem is of course that different sources of social division are incompletely "crystallized". While gender

is thus to some extent uncorrelated with class and other cleavages, it is not independent of them. The scope for complex *interactions* between class (or race or culture) and gender complicates both theory and empirical research.

Fortunately, most scholars now accept that these interactions cannot be ignored. In the study of stratification, few subscribe today either to the claim that patriarchy is a completely autonomous source of domination, or to the reductionist view that all of the sufferings of women are attributable to capitalism. In the field of welfare state research, the social democratic or class politics model which emerged in the late 1970s in key works by Walter Korpi (1978; 1980), John Stephens (Stephens 1979) and Francis Castles (Castles 1978) was born blissfully ignorant of gender. When the connection between social policy and gender inequality did move into focus, the most significant contribution from a comparative perspective optimistically argued that strong and solidaristic working class mobilization minimizes gender inequality along with class differences (Ruggie 1984). Later, Jane Lewis (1992) conducted a pioneering cross-national analysis which concluded that, on the contrary, there was little if any connection between the clustering of welfare states in terms of their contribution to class in/equality and their friendliness to women. Korpi's magisterial new study takes up this empirical agenda by presenting systematic evidence on the class and gender dimensions of social policy in a large number of advanced societies. Crossing the bridge built by feminists like Ann Orloff (1993) and Julia O'Connor (1993), Korpi builds his research around the theoretical insight that women have a specific set of interests vis-à-vis the welfare state. With Lewis and against Ruggie, he does not assume that what is good for the working class is also good for women.

It is striking that Korpi's endeavor has come to fruition at about the same time as another master of the class politics genre, Gosta Esping-Andersen, completed a different project but one that also links the concerns of comparative political economy with the study of gender relations. Esping-Andersen's new book offers an expanded and somewhat revised version of his influential regime model (Esping-Andersen 1990). In this version the family is fully elevated to the status of an alternative locus of welfare provision and solidarity to either the market or the state. Whereas market and state-centered social policy characterize the liberal and social-democratic regimes respectively, *familialism*—the provision of welfare within the family—is the hallmark of the conservative regime, especially in Japan and the Catholic countries of southern Europe.

Esping-Andersen's interest in the family serves to bolster his case for a distinctive conservative policy regime, which was previously anchored solely in the "corporatist"

legacy bequeathed by Catholicism and absolutism.¹ Like Korpi's study, Esping-Andersen's work drives home the important point that different social policy models are premised on, and serve to reproduce, differing notions of women's role in the family—not just alternative approaches to the division of labor between markets and states. However, unlike Korpi Esping-Andersen is not innately interested in probing how policy regimes differentially affect the well-being of men and women. He is more concerned with new challenges to the ability of the social-democratic model to balance equality, employment and efficiency and to safeguard the fiscal viability of generous welfare states. What impresses him about the Scandinavian social democracies in this context is their relative success in maintaining women's fertility and turning them into taxpaying employees.

Esping-Andersen has thus failed to respond to the core objections of those feminists who concede the value of the class politics approach but argue that gender-blindness limits its utility in key respects. The favored *dependent variables* of class politics—decommodification and redistribution—do not recognize that women are partially or wholly located outside the sphere of commodified labor. Especially in the case of unpaid care-workers without independent financial means, women's social citizenship is truncated and the welfare state may merely reinforce their dependence on male breadwinners. The favored *independent variables* of class politics—collective action through trade unions and party control of government—are problematic for the pursuit of women's interests because class and other cleavages dividing women hamper their achievement of political voice through institutionalized forms of solidarity. As Hobson (1999) has argued, the construction of a shared identity and mobilization of discursive resources constitute alternative and potentially more effective political mechanisms for women to press their social policy interests.

Unlike Esping-Andersen's book, Korpi's article directly responds to the feminist critique, but *only in relation to the dependent variable*. His study clearly distinguishes class and gender inequality, both conceptually and empirically. He also differentiates between the mechanisms by which class and gender policies are implemented, and seeks to demonstrate the connection across countries between class and gender policy profiles and actual disparities between classes and between men and women.

¹ In addition, it should be pointed out that Esping-Andersen's new interest in familialism permits him to address critics who accused him of failing to appreciate the distinctiveness of the Southern-European brand of conservatism (e.g. Liebfried 1992).

Turning to “the driving forces and actors” responsible for these disparities, Korpi proposes that in order to explain gender as well as class inequality it is necessary to pay attention to the role of churches and women’s movements and not only the actors (parties, unions and business organizations) that are dear to the class politics perspective (pp.2 and 17 [original typescript]). Nevertheless, he goes on to insist that political parties hold the key to policy outcomes and that, as mainstream research has argued for some time, they can be adequately mapped along the dimensions of class (left vs. right) and religion (confessional vs. non-confessional). Consequently, gender politics and “new politics” in general disappear from the explanation of policy differences.

It goes without saying that within the paradigm of quantitative cross-national analysis of large numbers of countries, it would be difficult if not impossible to move beyond indicators of the partisan distribution of formal political power. The critical question is whether this results in an unbearable contradiction between “the driving forces and actors” as theoretically conceived and what is actually measured. Korpi does not address this question directly. The fit between political constellations and modes of gender-inequality policy in Korpi’s Table 3 appears at first sight to be so strong that he might be excused on the grounds of parsimony from pursuing the types of explanations proposed by feminists. The Nordic states, with a strong left and little or no confessional influence, have the strongest commitment to dual-earner couples. At the other extreme the English-speaking countries and Japan, in the absence of religious parties and with only a subordinate or non-existent left, exhibit the least intervention of any kind. The remaining countries (except the Netherlands) are all characterized by some degree of confessional party influence on the one hand and, on the other, policies that grant a higher priority to traditional family support than to promoting dual-earning.

So much for the very big picture. A closer look raises some troubling questions. Variance in the political constellations reported in Korpi’s table does not seem to explain why the policy profile in Germany, Belgium and France is distinct from that of the other countries in this group yet similar to Norway, or why Switzerland has the “wrong” policies. Korpi is not afraid to introduce enlightening ad hoc conjectures to explain deviant cases, and he also draws on the International Social Survey program for comparative data on public opinion concerning gender roles. Yet the theoretical import of these additional data and observations is opaque. Beyond the impact of the church, there is little elucidation of what drives gender politics. Ironically, while women are seen as seeking agency, they do not employ agency in order to realize their interests.

Returning now to the dependent variable, Korpi's approach to measuring gendered social policy is to ask "does a policy support women's labor force participation or does it encourage their unpaid work at home?" (p. 17 [typescript pagination]). From a feminist perspective this distinction reflects the familiar tension between "equality" (implying that women should be helped to become commodified like men) and "difference" (decommodifying mothers so that they can stay home with their children). Korpi is not alone in having grappled with this and other challenges facing measurement of the woman-friendliness of welfare states across the OECD bloc. It is interesting in this context to compare his approach to that in Esping-Andersen's book and also to the pioneering article by Siaroff (1994) (who in turn built on unpublished work by Wilensky). All three had to deal with the perplexing character of child allowances and corresponding tax benefits (Wennemo 1994): they may afford mothers a degree of financial independence from their male partners, but may just as likely act to reinforce housewifery. Siaroff (1994) argued that the key issue is who receives child allowances (the mother or the father), and he incorporated this information into his summary mapping of welfare states. Korpi and Esping-Andersen take a less sophisticated approach, including child allowances with a battery of other indicators. Many of these are very similar (e.g. day care facilities for infants and home help for the elderly), but there are also differences. Esping-Andersen evaluates some disincentives to women's work not considered by Korpi (tax penalties and unemployment benefit losses to husbands whose wives work), whereas only Korpi measures the positive incentives offered by maternity and paternity leave.

The three authors also selected somewhat different sets of countries for their research. Siaroff cast his net most widely, encompassing 21 countries of which 3 are missing from Esping-Andersen's study: Switzerland, New Zealand and Greece. The first two of these are included in Korpi's research, but both Greece and the other two "new" democracies of Southern Europe (Spain and Portugal) are missing. Small differences like these can have substantial implications for the results of small-n research. While both Siaroff and Esping-Andersen report their raw data, Korpi describes his procedures in detail but reveals only the final synthetic rankings for what he assumes a priori constitute two orthogonal dimensions: "general family support" and "dual earner support". I performed a factor analysis on six indicators culled from Esping-Andersen's book and the results are consistent with Korpi's distinction. Moreover, both studies agree that the Nordic welfare states are in a class of their own in terms of supporting women's labor force participation. However Esping-Andersen's empirical work indicates that in Japan and the conservative countries of Central and Southern Europe this support is as low as in the liberal regime cluster (Esping-Andersen 1999: pp. 60-62 and Table 4A). In other words, his findings here do not sustain Korpi's

portrait of a tripartite world of “gender policy institutions”. Without access to the raw data, it is impossible to know whether this is the result of differences in indicators, samples, or methods of analysis.

A hallmark of Esping-Andersen’s work, both past and present, is his insistence that social policy configurations are incomplete without taking into account labor market policy in the broadest sense. For example, he points out that women’s capacity to opt for paid employment has been buoyed in Scandinavia by the availability of plentiful public sector jobs (cf. Huber and Stephens 1996), while in Continental and Southern Europe familialism is powerfully encouraged by laws, collective agreements and customs that protect married men from the vicissitudes of the labor market (cf. Castles 1985). Korpi opposes this comprehensive approach. He argues that his own focus on institutional differences in policy is preferable to more diffuse typologies (see pp. 11 & 33 [original typescript]).²

But at least since Titmuss propounded his concept of the “social division of welfare”, students of social policy have had to reckon with the fact that similar ends may be pursued by different means. Esping-Andersen (1999:22-23) correctly argues that the protection of male breadwinners from dismissal which is especially rife in Southern Europe may serve as an “implicit familialism” discouraging women from entering the labor market. Parallel to this supply-side argument, although apparently unnoticed by Esping-Andersen, it appears that in the liberal English-speaking countries legal and normative mandating of “equal opportunity” for women, as well as the hegemonic view that all able-bodied citizens are obligated to take on paid work, generate a demand-side boost to women’s integration into the labor market. Space is too limited to go into the details here, but using the data furnished by Esping-Andersen and Siaroff it can be shown that, ironically enough, this wider perspective both supports and enriches Korpi’s view of the rich capitalist democracies as broadly divided into three distinct clusters vis-à-vis gender policies.

What difference do woman-friendly policies make to gender inequality? Korpi’s article furnishes a variety of indicators relevant to evaluating this question. I have analyzed four: the gender gap in government composition, advanced education and labor force participation; and the poverty rate among lone mothers (see Korpi’s Tables 1, 4 & 5). The gap in educational achievement was weakly correlated with the other measures, so I used the

² To clarify, Korpi’s objection to Esping-Andersen’s approach is based not only on its broad definition of the dependent variable but also the intrusion of the independent variable (political constellations) into the definition of the “three worlds”.

remaining three to construct a composite indicator of political-economic gender inequality. Neither Korpi nor Esping-Andersen would be surprised to learn that the countries grouped very clearly into a sharp dichotomy: Scandinavia, characterized by relative equality, versus moderate to strong inequality everywhere else.

What happens when we compare this indicator of gender disparities with Korpi's ranking of 15 countries on class inequality (his Table 5)? We return to three worlds: Scandinavia and the English-speaking countries (including Catholic Ireland) at two poles, with the rest dispersed between them. Based on a cross-tabulation using his own summary measure of gender inequality (which does not appear in the article) Korpi reaches a different conclusion, that the two cleavages are only weakly correlated. He attributes this discordance to "the fact that welfare state institutional constellations often have asymmetrical effects on ... gender and class" (p.32 [original typescript]). In particular, and consistent with our observation in the previous paragraph, he finds that Anglo-Saxon liberalism is not as bad for women as for the poor. The contradiction between our two readings of the data definitely mandates careful attention.

In the course of this essay I have repeatedly returned to findings suggesting that the two most coherent worlds of gender *and* class inequality are to be found in the Nordic states and the English-speaking world; whereas in Western Europe, outside of Britain and Scandinavia the relative strength of the forces of conservatism—led by long-dead popes, monarchs and dictators—seem to explain most of the variance. This view attributes both too much and too little to working class mobilization. Notwithstanding Korpi's suggestion that a threshold effect is at work, I find it implausible to assume that the vibrancy of Nordic social democracy is capable of explaining *all* of Scandinavian exceptionalism; yet it is equally unlikely that weaker versions of organized laborism have left little or no imprint on Britain, the Antipodes and the German-speaking countries. Similarly, the absence of confessional politics in the English-speaking world and the decline or strategic reorientation of their labor parties in recent decades cannot suffice to explain Anglo-Saxon exceptionalism. In short, there is much to be done. We can hope that the analysis of inequality proposed by Korpi will continue to evolve in his skilled hands. But it is also up to the sophisticated analysts of social policy and gender whose work is disseminated in this journal to marry their insights into "new" politics with his remarkable range, discipline and mastery of empirical materials. Now that Korpi has seriously taken up the feminist challenge it is up to feminists to push his conceptual and empirical framework beyond its present limits.

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