

A Theoretical Consideration of Welfare Regime and Gender in Europe



Social Science

KEYWORDS : Gender equality, social care, degenderization, defamilialization, Europe

**Almudena Moreno
Mínguez**

Department of Sociology and Social Work, University of Valladolid, Campus María Zambrano, Plaza Alto de los Leones, 1, 4005 Segovia Spain

ABSTRACT

This paper addresses the main theoretical debates about gender equality through the concepts of welfare regime and gender regime. The article establishes two lines of enquiry: the first concerns the revision of the literature about welfare regime, while the second seeks to trace the contours of the gender regimes and gender/family policies that result from each country's institutional and cultural arrangements. The article begins with a brief review of the literature on gender and welfare regimes. The reflection conclude by suggesting new contributions to the theories of welfare regime based on the concept of care as a form of social capital (networks of care-based relational solidarity), a key element in understanding of gender equality.

Introduction

This article presents a theoretical reflection on the components of welfare regime from a gender perspective. The ultimate aim of this reflection is to propose a comparative theoretical model of analysis that enables us to establish the position occupied by gender and care in the present context of the transforming of the welfare states. It is therefore appropriate to include this comparative theoretical analysis based on the paradigm of gender regimes as a precursor to explaining the differential conceptualization of care, family and social policies in the different European countries given that these have very different development histories.

In this article we offer a theoretical model that integrates welfare and gender regime perspectives based on the degree of defamilialization and degenderization resulting from the conception of care and family policies in European countries, as a means of examining gender equality. The idea is that family policies about care are the product of a specific cultural and institutional context. Thus, the effects of social policy on gender equality in each gender regime will be interpreted as the outcome of the culture operative in each welfare state. In the States with a supporting individualization of rights and defamilialization of the costs of dependence tend to have achieved greater degenderization. The gender and welfare regime typologies presented here are structured around the degree of degenderization and defamilialization achieved by the various Welfare States through their family policies about care.

The present article attempts to lay the theoretical basis which might prove of interest in continuing research into the consideration of the gender and care in the theories of welfare regime, in an attempt to contextualize some outstanding contributions from compare sociology on gender and welfare regime.

Current theoretical debates

We will go on to examine the main theories and paradigms that have sought to include the categories of gender, care and the family in comparative studies on the welfare state. The purpose of this study is not to present an empirical analysis with primary data, but rather to present a theoretical reflection based on existing literature. Such a comparative theoretical revision enables us to establish the position currently occupied by gender in family policies in the different welfare state models within a context of redefining social policies as a consequence of the economic crisis.

The economic downturn has had a significant impact on social and gender policies. A complete understanding of the incidence of the crisis requires knowledge of the normative and ethical framework on which these gender policies are based. The work In a different voice published by Carol Gilligan in 1982 serves as a reference for explaining how gender policies stem from the acknowledgement of a care ethic, the main responsibility for which has historically fallen to women. This ethical review of care has given rise to a normative construction of gender poli-

cies based on men's and women's differing responsibilities with regard to care work. It could be said that the introduction of the gender dimension into the concept of care has shifted the emphasis from the masculine-based welfare state (monetary and material welfare) towards what is known as well-being (welfare that responds to the needs of people) which is still in the early stages of research. The issue of gender and care has become a central theme on the research and policy agenda of the modern welfare state.

Much has been written on welfare state typologies in Europe, starting with the work of Esping Esping-Andersen (1990; 1999); and much debate surrounds the question of which countries belong in which welfare regime. Esping-Andersen (1990) argued that historical events have led to different regime types, which he referred to as the Liberal, Conservative, and Social Democratic models. According to Esping-Andersen (1990), levels of de commodification, social stratification, and employment are central to the classification of these regimes. De commodification refers to rights that diminish people's status as commodities of market forces, or the extent to which the individual's welfare is independent of the market. Social stratification concerns the importance of class structures and divisions in society, and employment has to do with the private-public mix. Esping-Andersen proposed that countries could be grouped together according to the roles of the state, the market, and the family in providing welfare for their respective citizens.

Esping-Andersen's book *The Three Worlds of Welfare Capitalism* has left a great deal of debate and literature in its wake. Researchers have since suggested an assortment of new types and boundaries for different regimes (Arts and Gelissen, 2002; Bamba, 2007; Bonoli, 1997; Castles 1998; Cousins, 2005; Ferrera, 1996; Wildeboer et al., 2001). Ferrera (1996) and Leibfried (1992) argued for the introduction of a Southern Mediterranean regime type; while others divided the Liberal model into two categories (Castles, 1998; Kangas, 1994). There is general consensus about restricting the social-democratic regime type to the Nordic countries, with the exception of Iceland. Later, Esping-Andersen (2009), Gallie and Russell, (2009), Hakim (2000; 2000), and Crompton (2006) sought to incorporate gender issues from various perspectives into the comparative analysis of welfare regimes. This was an effort to explain diversity in family models, care regimes, and access of women to the labour market and public and private positions of responsibility (Keck and Saraceno, 2013).

It has taken researchers a long time to include the issue of care in their studies. In fact, the classic work of Esping Andersen does not directly refer to gender policies and to the central nature of care as a key element for articulating social and gender policies. It was left to feminist researchers at a later date to include the concept of care within a normative framework of responsibilities and obligations. The term care has thus become an indispensable analytical category for the comparative study of welfare systems, and is incorporated through what has

been called the “gender regime” (Daly and Lewis, 1998; 2000). As part of the comparative analysis of European welfare states, numerous feminist researchers have advocated a concept of citizenship which highlights the importance of care from the gender standpoint, as first posited by Carol Gilligan, with the intention of reinforcing gender policies in welfare states.

The ‘gender regime’ literature has emphasized factors that are likely to affect the strength of family pressures: in particular the differing levels of institutional support for childcare and family needs. This feminist approach critiques classical theories on welfare regimes for ignoring the gender perspective in welfare state typologies (O’ Connor, 1996; Orloff, 2009; Sainsbury, 1996). Within this framework, the state is conceptualized as the central form of institutionalization of gendered power. According to Connell (2002) each state thus has a definable “gender regime” that is linked to the wider “gender order” of the society. Sainsbury (1996) defines a gender regime as a complex set of rules and norms that create established expectations about gender relations, allocating different tasks and rights to women and men.

Gallie and Russell (2009) identified the Nordic gender regime in terms of their generous leave provisions and stronger infrastructure for early childcare. In contrast, continental type gender regimes such as that of Germany sought to resolve the potential conflict between work and family life by providing strong incentives for women to exit the labour market when there were young children in the home. Liberal regimes provide the least childcare assistance, offering neither good public provision nor adequate support for caregiving in the home. Research describing ‘gender regime’ characteristics in Southern European or Mediterranean countries is somewhat scarce. These studies have focused in the influence of familism in the care and family policies (Moreno Mínguez, 2007; 2010; Leitner, 2003).

On the other hand, the feminist critique of Esping-Andersen’s work introduces new concepts such as “care work” and “defamilialization process” for comparative discussion of welfare states (Lewis, 1992; 1997). She focuses on the treatment of women with regard to the social security system, the types of family policies developed in each state and the degree to which women have entered the labour market (paid work vs. unpaid care work). Saxonberg (2012) finds the terms ‘familialization’ and ‘defamilialization’ to be simply too ambiguous to end the typology debate; as many scholars use the terms differently and therefore obtain very different results.

In response to feminist critique, Esping-Andersen (1999) later included social services in his model, and the degree to which the access to (public) social services provided protection

against dependency on the family (de-familization), although he does not refer directly to unpaid family work done by women in the family. In the last book (Esping Andersen, 2009) he focuses especially on the topic for gender equality, on the role of families in the reproduction of social inequalities. However it does not adequately address the work-family conflict roles (Scott et al., 2012).

Along these lines, Daly (2000) examined how particular types of welfare state arrangements affected the distribution of resources and opportunities between men and women. In particular, she examines the impact of the British and German welfare states on gender relations within each country. Working from the hypothesis that the complexity and variety of form and content of public policies in welfare states directly affect gender relations and therefore gender equality, Daly introduced the gender perspective and the concept of ‘care’ as a key factor for analysing welfare state typologies.

Pfau-Effinger (2005; 2009) expanded this perspective by introducing a culturalist dimension of “gender arrangement”. She integrated culture into a theoretical framework for explaining cross-national gender differences. The gender arrangement approach assumes that cultural ideas and values regarding gender shape male and female behaviour as well as institutional policies. Haas (2005) revised culturalist and structuralist approaches on different welfare and family models, integrating them into a new theoretical framework for understanding the relationship between culture, practices, and policies related to the work-care balance. She created a welfare regime typology tool for analysing care strategies and gender-specific divisions of labour. More recently along the same interpretative lines, Brooks and Manza (2007) and Wendt et al. (2011) highlighted the importance of public opinion and policy preferences in understanding welfare state developments. New analytical approaches within this research framework have also sought to examine family policy typologies in various welfare states based on the need to address ‘genderization’ in the discussion on social policies. Saxonberg (2012) argues for a typology based on the degree of genderization and degenderization for explaining the different types of family and social policies in diverse welfare regimes. Such theoretical paradigms seek to address the issue that similar social and care policies can have very different gender effects.

New theoretical contributions

In this approach we present a typology of the gender regime and welfare regime as a starting point for future theoretical reflection regarding the role of care, gender and family in the configurations of new welfare regime after economic crisis (see figure 1).

Figure 1. Typologies of gender regime and welfare regime in Europe

	<i>Social-democratic</i>	<i>Liberal</i>	<i>Conservative</i>	<i>Southern</i>
<i>Care</i>	Public as form of social capital	Private oriented to market	Mix public and Private	Private oriented to family
<i>Gender</i>	Desgenderization/Public	Limited desgenderization/Private	Genderization/Family	Genderization /Family
<i>Family</i>	Desfamiliarization	Desfamiliarization from market	Familiarization from public policies	Familiarization from family support
<i>Family policies</i>	Generous individualized family policies	Few family policies oriented to market	Generous family support to female caregiver	Few public family policies
<i>Conception of gender equity</i>	High gender equality	Medium gender inequality, achievement orientated equity	Stable gender inequality,	High gender inequality, female caregiver
<i>Examples</i>	Sweden, Denmark	United Kingdom Ireland	Germany, Austria	Italy, Spain

Source: Own elaboration

These comparative analysis of gender regimes and gendered policies of care has been enriched by the reflections introduced by Gilligan and continued by authors such as Held (2006), Knijn and Kremer (1997). This focus goes beyond the ethical and institutional recognition that the gender dimension brings to care. In fact the concept of care can be understood as a new form of social capital, which will be crucial for interpreting individual

and collective actions concerning the resilience of communities suffering the effects of the crisis. According to Gilligan, the concept of care ethics based on women’s perceived responsibility to satisfy people’s care needs is centred not on abstract judgements, but on the responsibility deriving from an awareness of being part of a network of relationships of interdependence. This is due to the fact that women’s identity is strongly relational in nature (Rossing et al., 1999). This view of care is directly

linked to the theory of social capital explored by authors such as Bourdieu (1986) and Coleman (1988). This approach is scientifically significant, as the recognition of the need for care in the management of social and gender policy implies –on the one hand– accepting that care is a form of social capital, beyond intangible components such as skills and knowledge, and –on the other– institutionalizing and externalizing care as a basic need for citizens in capitalist economies. On the basis of these considerations on gender and care, the processes of social and institutional transformation of market economies can be explained by applying the analytical model of Polanyi (1944). The idea is that the accumulation of social capital (networks of care-based relational solidarity) by citizens can enable them to cooperate and transform their skills into capacities (Sen, 1989, 1999).

Conclusion

This paper contributes to the theoretical debates about gender equality through the concepts of welfare regime and gender regime. The theoretical debate presented in this article provides new ideas about care (as a form of social capital) to incorporate

to the reflexion on the typology of welfare regime and gender regime. The various ways in which the welfare states have incorporated these ideas on gender have led to different models of action in social and gender policy, as well as to different forms of resilience and cooperation devised by citizens in response to the crisis. The analysis of these new forms of cooperation of individuals and families on the basis of care is a new theoretical contribution to comparative sociology of gender and welfare regime is yet to develop. We hope that the theoretical contribution of this article contributes to extend the reflection and debate on the welfare regime from a gender perspective.

In short, the future of the welfare states and social cohesion in the current context of cutbacks in social expenditure in Europe depends, among other factors, on the incorporation of the gender dimension into family policies of care through the acknowledgement of the responsibility of men, women, markets, States and communities in providing care as a form of social capital. Only in this way will it be possible to advance in the welfare and well-being of its citizens.

REFERENCE

- Arts, W., & Gelissen, J. (2002). Three worlds of welfare capitalism or more? A state-of-the-art report. *Journal of European Social Policy*, 12(2), 137–158. | Bamba, C. (2007). Defamilialisation and welfare state regimes: A cluster analysis. *International Journal of Social Welfare*, 16, 326–38. | Bonoli, G. (1997). Classifying Welfare States: A Two-dimension Approach, *Journal of Social Policy*, 26(3), 351–372. | Brooks, C., & Manza, J. (2007). Why Welfare States Persist: The Importance of Public Opinion in Democracies. Chicago: University of Chicago Press. | Bourdieu, P. (1986). The Forms of Capital, J. Richardson (eds) *Handbook of Theory and Research for the Sociology of Education*, 241–258. | Castles, F.G. (1998). Comparative Public Policy: Patterns of Post War Transformation, (Cheltenham: Edward Elgar). Castles, F.G. & Mitchell, D. (1993) 'Worlds of Welfare and Families of Nations' in F.G. Comparative Political Economy of the Welfare State, New York: Cambridge University Press. | Coleman, J. (1988). Social capital in the creation of human capital, *The American Journal of Sociology*, 94, 95–120. | Connell, R. (2002). Gender. Cambridge, Polity Press. | Cousins, M. (2005). *European Welfare States: Comparative Perspectives*, London: Sage Publications. | Crompton, R. (2006). Employment and the family. Cambridge: Cambridge University Press. | Daly, M. and Lewis, J. (2000). The concept of social care and the analysis of contemporary welfare states, *British Journal of Sociology*, 51 (2), 281–299. | Daly, M. and y Lewis, J. (1998). Introduction: Conceptualising Social Care in the Context of Welfare State Restructuring in Europe, en Lewis (ed.), Gender, Social Care and Welfare State Restructuring in Europe. Ashgate: Aldershot | | Daly, M. (2000). A fine balance: Women's labour market participation in international comparison, in F. Scharpf and V. Schmidt (eds) *Welfare and Work in the Open Economy*, Oxford: Oxford University Press. | Esping-Andersen, Gøsta. (1999). Social Foundations of Postindustrial Economies. Oxford: Oxford University Press. | Esping-Andersen, G. (1990). The three worlds of welfare capitalism. Cambridge: Polity Press. | Esping-Andersen, G. (2009). The Incomplete Revolution. Adapting To Women's New Roles. Cambridge: Polity Press. | Ferrera, M. (1996). The 'southern model' of welfare in social Europe. *Journal of European Social Policy*, 6, 17–37. | Gallie, D. and Russell, H. (2009). Work-Family Conflict and Working Conditions in Western Europe, *Social Indicators Research*, 93, 3, 445–467. | Gilligan, C. (1982). In a Different Voice: Psychological Theory and Women's Development, Harvard: Harvard University Press. | Haas, B. (2005). The Work-care Balance: Is it possible to identify Typologies for Cross-national Comparisons?, *Current Sociology*, 53 (3), 487–508. | Hakim, C. (2000). Work-Lifestyle Choices in the Twenty-first Century: Preference Theory, Oxford: Oxford University Press.. | Held, V. (2006). The Ethics of Care: Personal, Political, and Global. Oxford University Press. | Keck, W. and Saraceno, CH. (2013). The impact of different social policy frameworks on social inequalities among women in the European Union: The labour market participation of mothers". *Soc Pol*, 20: 297–328 | Knijn, T. and M. Kremer (1997). Gender and the Caring Dimension of Welfare States: Toward Inclusive Citizenship, *Social Politics* 4 (3), 328–361. | Leibfried, S. (1992). Towards a European welfare state? On integrating Poverty Regimes into the European Community, in Z. Ferge and J. E. Kolberg (Eds) *Social Policy in a Changing Europe*, Frankfurt, Campus Verlag. | Leitner, S. (2003). "Varieties of Familialism: The Caring Function of the Family in Comparative Perspective." *European Societies* 5 (4), 353–375. | Lewis, J. (1992). Gender and the Development of Welfare Regimes, *Journal of European Social Policy*, 2 (3), 159–173. | Lewis, J. (1997). Gender and Welfare Regimes: Further Thoughts' *Social Politics. International Studies in Gender, State and Society*, 4 (2), 160–177. | Moreno Mínguez, A. (2007). Familia y empleo de la mujer en los Estados del bienestar del sur de Europa. Incidencia de las políticas familiares y laborales. Madrid: Centro de Investigaciones Sociológicas, Colección Monografías. | Moreno Mínguez, A. (2010). Family and gender roles in Spain from a comparative perspective. *European Societies*, 12(1), 85–112. | O'Connor, J.S. (1996). From women in the welfare state to gendering welfare regimes, *Current Sociology*, 44(2), 101–118. | | Orloff, A. S. (2009). Gendering the Comparative Analysis of Welfare States: An Unfinished Agenda, *Sociological Theory*, 27, 3, 317–43. | Pfau-Effinger, B (2005). Culture and Welfare State Policies: Reflections on a Complex Interrelation, *Journal of Social Policy*, 34, (1), 3–20. | Pfau-Effinger, B.; Flaquer, L. and Jensen, P. (2009). Formal and Informal Work: The Hidden Work Regime in Europe. New York: Routledge. | Polanyi, K. (1944). *The Great Transformation: The Political and Economic Origins of Our Time*, Boston: Beacon. | Rossing, R. and Assaf, S. (1999). Social capital: conceptual, frameworks and empirical evidence, Social Capital Initiative, Working Paper No. 5, The World Bank. | Sainsbury, D. (1994). *Gendering Welfare States*, London, Sage Publication. | Saxonberg, S. (2012). From Defamilialization to Degenderization: Toward a New Welfare Typology, *Social Policy & Administration*, (forthcoming). | Scott, J., Dex, S. and Plagnol, A. (2012). Gendered Lives: Gender Inequalities in production and Reproduction. Edward Elgar: Cheltenham. Available from Edward Elgar Publishing. | Sen, A.K. (1989). Development as Capability Expansion" in K. Griffin and J. Knight (eds), *Human Development and the International Development Strategy for the 1990s*, London: Macmillan | Sen, A.K. (1999). Commodities and Capabilities, Oxford: Oxford University Press. | Wildeboer S.; Vrooman, J. and De Beer, P. (2001). On Worlds of Welfare. Institutions and their effects in eleven welfare states. The Hague: Social and Cultural Planning Office, April 2001. | According to Esping Esping-Andersen, welfare regimes are based on the public-private mix in the provision of welfare: namely, the degree to which national welfare regimes decommodify labour. According to Esping-Andersen, decommodification occurs when a service is rendered as a matter of right, and when a person can maintain a livelihood without reliance on the market. | Defamilialization is a concept initially used by feminist scholars as a precondition for women to commodify themselves apart from the family. In contrast familization is defined as an informal security network from the family and women (unpaid work) offering care- services for children, older and sick people (Lister, 2003). | Saxonberg (2012) proposes a definition of 'genderizing' policies as those that promote different gender roles for men and women. 'Degenderizing' policies would therefore denote those that promote the elimination of gender roles. | Coleman referred to social capital in order to conceptualize aspects of the social structure, such as community actions to facilitate economic transactions. For Bourdieu (1986), social capital is the individual's capacity to create social networks capable of mobilising other forms of economic, symbolic and cultural capital in terms of reciprocity. In short, social capital is defined as the accumulation of resources through social reciprocity networks. | The theory of A. Sen has been used by a number of economists to explain the nature of social capital, and particularly the mechanisms for investing in social relationships capable of creating new outputs such as well-being. | According to Adger (2000) the concept of resilience is the ability of communities to withstand external shocks to the social infrastructure |