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**WOMEN, WORK, AND WELFARE:  
A CASE STUDY OF GERMANY, THE UK, AND SWEDEN**

by

**MEREDITH LEGG**  
B.A. University of Central Florida, 2006

A thesis submitted in partial fulfillment of the requirements  
for the degree of Master of Arts  
in the Department of Political Science  
in the College of Sciences  
at the University of Central Florida  
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## **ABSTRACT**

This thesis examines how different welfare state regimes affect gender relations by examining variations in welfare regimes and outcomes for women between Western European countries. The research seeks to understand how the diverse systems of social provision affect women: particularly with regard to their position in the labor market and in their ability to balance occupational and domestic work. Using a comparative, qualitative approach, I compare three Western European welfare states (Germany, the United Kingdom, and Sweden) to evaluate gender-relevant welfare policy with female employment rates, unemployment rates, and wage differentials. Welfare states and labor market policies affect outcomes for women because these policies influence and structure women's ability to enter paid labor and at the same time perform the majority of household labor and care work.

To study the effect of welfare state variations upon women, I argue that a gender-focused model of welfare states is necessary. I borrow from Diane Sainsbury's (1996) framework establishing two contrasting ideal-types and combine this with Pascal and Lewis' (2004) gender equality model. Using this framework, I will assess whether my case studies vary around specific gender dimensions of variation including bases of entitlement, maternal and parental leave, pension, and the organization of care work. Preliminary findings align Germany and the United Kingdom with a male breadwinner gender model and Sweden with a dual-earner dual-carer model, although recent policy reforms in Germany and the United Kingdom oriented toward a Scandinavian welfare model may affect future gender outcomes.

My research question hopes to uncover how welfare regimes and specific gender-relevant policies support or ignore women's labor force participation by reconciling work and home for women through an evaluation of gender-relevant outcomes for women. Systematically looking at the structure of welfare state provision and outcomes through a gender-relevant framework enhances our knowledge of the ways in which the varieties of gender regimes accommodate or perpetuate women's inequality in democracies.

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## **CHAPTER ONE: INTRODUCTION**

My research explores the connections between welfare state regimes and gender relations in advanced industrialized countries. The thesis examines how different welfare state policies and labor market structures affect gender relations by examining variations and outcomes for women across countries.

Using a comparative, qualitative approach, I compare different Western European welfare states to evaluate women's employment rates. Welfare states and labor market policies affect women's employment rates because these policies influence and structure women's ability to enter paid labor and at the same time perform the majority of household labor.

Historical structural arrangements of the state have affected citizens' abilities to balance paid labor and domestic work; considerable differences exist between state welfare policies that support employed mothers and dual-earner families or stay-at-home mothers and male breadwinner family arrangements. Furthermore, considerable state differences exist in welfare policy outcomes between men and women. Labor force participation rates are one such outcome/dimension heavily affected by different patterns of labor market regulation and welfare state policy frameworks that in turn affect working women and mothers. Current research on welfare states has shown how the variations in the availability and extent of public services and income maintenance and taxation programs affects the distribution of resources among individuals and households, leading similarly to variations in outcomes for women (Daly 2000: 63). Multiple studies have found that welfare states that support working mothers enable women to maintain continuous labor force activity (Stier et al. 2001).

My thesis studies cross-national variations between welfare state regimes and the extent to which these states offer benefits to mitigate poverty and programs to support the employment and economic independence of women, especially women with significant care giving responsibilities. It seeks to

understand how the diverse systems of social provision affect women, particularly with regard to their chances for employment and in their ability to balance occupational and domestic work. My research question asks which welfare regimes and specific policies value and support women's labor force participation by reconciling work and home for women. Additionally, the research seeks to understand why differences exist in women's employment rates between similar countries. I hypothesize that different institutional welfare state types produce different outcomes for women. Countries with the appropriate "work-life" policies may facilitate women's access to employment and may lead to higher labor force participation rates for women (Stier et al. 2001; Gambles et al. 2007).

The increase in women's participation in the labor force has not necessarily been adequately matched with the essential social policies that enable women to combine paid labor and domestic work. Welfare then is an inherently feminist issue and feminists have a special responsibility to concern themselves with welfare and welfare reforms. To illustrate the welfare debate from a critical gender theory perspective, I first explain and critique Habermas' deliberative alternative for feminist politics followed by a discussion of feminist theory including goals of reconceptualizing the welfare state and citizenship under the principles of care work and dependency. Both Habermas and feminist theorists have contested the dominant policy discourse on welfare and the welfare system at large. Understanding the current debates in feminist theory helps to make sense of complex relationship between welfare state policy variation and gender outcomes that shape women's employment opportunities and "work-life" situations.

Feminist researchers have amended mainstream welfare state analysis with a feminist comparative approach, bridging gender theory and empirical analysis in order to better understand welfare state effects on gender relations. This field of study demonstrates how conventional accounts of the welfare state are insufficient because the research does not fully explain the large variations in processes and outcomes or the differential treatment between women and men (Lewis 1992; O'Connor et al. 1999; Sainsbury 1996).

Mainstream welfare analysis includes the seminal work by Esping-Andersen (1990), which categorizes welfare states based on the variations in content by grouping countries into similar welfare state regime types. The three regimes types identified include the Social Democratic model of nations, such as Sweden and Norway, that integrate state and economic policy, promote full employment for citizens and emphasize universal rights catered to the middle class; the Conservative-Corporatist model includes countries such as Austria, France, Germany, and Italy and links social rights to class and status through varieties of social insurance, coordinates state and market integration, and provides social services targeted to the maintenance of the traditional family; while the final regime type, the liberal welfare model, includes the U.S., Canada, Australia, and the United Kingdom and feature state policies that limit state intervention in the market, thus offering income and/or means-tested assistance, modest benefits with strict entitlements rules that produce an “equality of poverty” among recipients (Esping-Andersen 1990: 27). Esping-Andersen’s comparative welfare regime typologies were later employed and amended by O’Connor, Orloff, and Shaver (1999) to include a more comprehensive multi-dimensional gender analysis of welfare states. The authors analyze three policy area dimensions that affect gender relations including the labor market, income maintenance and the regulation of reproduction while including gender within the context of other interconnected social relations rather than “separating gender out” (O’Connor et al. 1999: 30). Their research assesses each state based on gender dimensions including old age benefits, unemployment, single parenthood, family needs, and support to caregiving while evaluating each state’s welfare policy in terms of women’s opportunities to maintain an autonomous household (O’Connor et al. 1999: 15).

Rather than amend Esping-Andersen’s welfare typologies with gender dimensions, Diane Sainsbury’s research opts to analyze welfare states based on two contrasting ideal types: the male breadwinner model and the individual model to highlight gender separately (Sainsbury 1996: 41). Her work examines comparative variations in four countries around specific dimensions including familial ideology,

entitlement, bases of entitlement, recipient of benefits, unit of benefit, taxation, employment and wage policies, and the organization of care work (Sainsbury 1996: 42). A focal point of the research concerns the bases of entitlement for women (as either mothers, wives, citizens, or workers), which she argues constitutes a crucial factor determining women's capacity to achieve a socially acceptable standard of living independent of the family (Sainsbury 1996: 43). Sainsbury's findings demonstrate how entitlements based on need and work can disadvantage women due to their disadvantaged position in the labor market, how women's entitlements as wives tends to support the gendered division of labor and the family wage a part of the male breadwinner model, and how women's entitlements as mothers and citizens may provide an acceptable standard of living independent of family relationships (Sainsbury 1996).

To study welfare state variation for women, I borrow from Diane Sainsbury's work the two contrasting ideal-types framework. The ideal-type framework will determine to what extent the chosen countries conform or deviate from specific types of welfare states. Sainsbury argues that in order to examine the relationship between welfare state variations and gender, a reconceptualization of gendered concepts and assumptions is necessary to mainstream welfare state research. Using this framework, I examine whether my chosen countries vary around specific gender policy dimensions including bases of entitlement to welfare, maternal and parental leave, pension and the organization of childcare. The indicators measuring gender outcomes include women's employment rates, unemployment rates, part-time employment rates, birth rates, and wage differentials. A focus of the analysis will include women's bases of entitlements under the two contrasting ideal-types in order to reveal what extent either model is reflected in the three countries studied. The bases of women's entitlements according to women's roles include entitlement as wives, mothers, citizens, and/or workers. Sainsbury's framework speaks to my chosen dimensions and my research question by highlighting how different entitlements based on

women's roles creates incentives and disincentives to work, influencing women's employment opportunities.

The countries I have chosen—Germany, the UK, and Sweden—represent the range of variations between different welfare state arrangements that contribute to the variation in gender outcomes across countries. All three welfare states have in common the dilemma women face between balancing career and carework. Sweden was chosen to represent the Social Democratic welfare model; the country is characterized by generous levels of welfare provisions for women and relatively high rates of female employment; women's labor force participation rate stood at 71 percent in 2006 (OECD 2008). Sweden exemplifies this welfare state type as a mixed economy with heavy social expenditure and the universal provision of welfare. Entitlement to benefits is based on citizenship, providing married women with individual entitlement to benefits regardless of sex, marital status, labor market status, or income (Sainsbury 1996: 63). Since the 1960s, the influence of the male breadwinner model, as compared to the other welfare models, is modest for the Swedish case. By the 1960s, single parents received the same tax advantages as married couples, all women were entitled to the family allowance, and married women received individual rights to basic old age pension, disability and sickness benefits (Sainsbury 1996: 68). Sweden conformed consistently to the dual-earner dual-carer gender model through my analysis. In terms of outcomes across countries, Sweden had the highest female employment rates, the lowest gender gap in employment rates, low levels of female unemployment rates, and relatively high birth rates. In terms of gender policy across countries, Sweden recognizes citizenship and care as bases to entitlement to benefits; provides both parents with generous parental leave in terms of duration and payment ; pensions are generous with equality in access through a universal minimum pension and earnings-related supplementary pension that resulting in a gender gap in pension income between men and women; and widespread public childcare is available to nearly all citizens.

Germany was chosen to represent the Conservative-Corporatist welfare state model because it presents a unique case as the midpoint between the Swedish and the UK models, rewarding and valuing carework yet targeting social serves to the maintenance of the traditional family. Status and occupational differentiation among groups is reinforced due to the separate provisions and distinct programs for different social strata, including women. The welfare regime has been characterized as a “system of social insurance with welfare elements” granting strong rights to income replacement and the general provision of a social minimum referred to as Sozialhilfe, introduced in 1961 as a safety net against poverty (Daly 2000). “The German welfare state is based, not on maximizing employment, but on providing subsidies to the “outsiders,” who are encouraged to leave the labor market to those who are highly productive” (Pierson 1996). Historically, the West German welfare system afforded women stay-at-home motherhood through generous social benefits targeted at the household/family level and based women’s claims (entitlements) for social provision on motherhood rather than as workers, based on need, or citizenship claims (Daly 2000). Women’s basis to entitlements largely derived from their husbands’ rights because of the German system’s allocation of social services and transfers to the main income earner of households rather than allocate services individually to both women and men. In terms of outcomes for women, the labor force participation rate for German women has increased moderately and currently stands at 61 percent in 2006 (OECD 2008). Germany consistently conformed to a male breadwinner gender model throughout the research. In terms of outcomes across the three countries, Germany features the lowest female employment rate, the highest gender gap in employment between the sexes, the highest female unemployment rate, and the lowest birth rate. In terms of gender policy across the countries, Germany recognizes work, care, and marriage as a basis to entitlement to benefits; it provides extensive maternal and parental leave scheme in terms of duration (over a year) and generous income replacement payment scheme; adequate pension benefits are accrued only through work and marriage while adequate public childcare does not exist.

The United Kingdom was chosen to represent the Liberal welfare model. The UK welfare state model includes stronger provision of services through the market than the other two states while intervening when markets fail with guaranteed low-level payments aimed at poverty alleviation (as opposed to poverty reduction) for citizens (Daly 2000:12). Welfare benefits in the U.K. include five separate groups of services, including cash benefits, health care, education, housing, and the personal social services. The UK welfare state is committed to the principle of individual rights and does not formally protect the family through social policy (Daly and Rake 2003). Social rights in the UK are granted based on obligations--the duty of work and payment of contributions, whereas Swedish social rights are based on the ideal that all members of the community possess social rights regardless of societal obligations. The UK female labor force participation rate stood at 67 percent in 2006 (OECD 2008), while the UK has historically offered “minimal social policy support for men and women to combine paid work and care responsibilities prior to the election of New Labour in 1997” (Gambles et al. 2007: 22). The UK consistently conformed to a male breadwinner gender model through both policy and outcomes in my analysis. In terms of outcomes across the three countries, the UK featured significantly higher rates of female employment than German women, a large gender gap in employment rates between men and women, the lowest female unemployment rate, and relatively high birth rates. In terms of gender policy across countries, the UK recognizes work, need, care, and marriage as bases to entitlement to benefits; it provides inadequate work-based maternal and parental leave that is long in terms of duration but low in allowance pay; an adequate pension scheme accrued through work, care, and marriage provides some support to women; while childcare is privatized in every respect save for poverty and disability assistance.

Gender is an important dimension of welfare state variation that is often neglected in mainstream welfare state analysis yet is an essential component to welfare state structures. The crux of this analysis examines the linkages between the institutional character of welfare regimes and outcomes in terms of the ordering of gender relations. More broadly, my study attempts to understand how gender is embedded in the

institutional structures and processes that have traditionally been seen as gender neutral. Labor force participation rates are then an important dimension to analyze in terms of understanding the gendered nature of welfare state processes and outcomes.

The “legacy of different economic and familial spheres” produced by capitalist industrialization’s separation of work from the home and family has important consequences for gender relations today, and different policy arrangements for combining work and family (or the lack thereof) cause different variations in women and men’s paid employment (Rudd 2000). Furthermore, “the social integration of discriminated groups is determined to a large extent by their labor force participation rate, which is a clear indicator of the power structure within a social group” (Stock 2006: 59). Employment implies access to resources and facilitates women’s independence and societal acceptance of women in worker roles. Conversely, women’s work inside households is not usually classified as economic even though it contributes to marketed production.

The institutional and relational welfare state frameworks that facilitate a dual-earner model of work-life interaction are important to citizens of advanced industrialized nations, particularly with regard to women who are assumed to be naturally fit for private sphere duties. The comparative study of the interaction between gender relations and welfare state types is important because mainstream welfare state research has largely overlooked how policy regimes impact gender relations. A comparative qualitative study of welfare states’ impact on women’s employment opportunities in the last decade will highlight the extent to which different state and market arrangements accommodate women’s occupational and domestic work. Social policies based on the needs of inevitable dependents and caretakers that are universal address the unpaid work of women. My research evaluates the extent to which welfare policies value and compensate care work by studying welfare state variation across countries with different welfare state frameworks and gender outcomes.

Chapter 2 of my thesis reviews the existing competing theoretical and conceptual approaches in comparative gendered welfare state analysis in order to establish my own preferred framework of gender with a discussion of competing conceptualizations of gender and philosophical debates concerning gender and democracy and critical gender theory. Chapter 3 introduces my methodology with which to analyze welfare state variation and gender outcomes. Chapters 4-6 consists of individual case studies of the three chosen countries based on a modified version of Sainsbury's theoretical model measuring gender and welfare state policy. Finally, Chapter 7 examines the policy and outcomes comparatively across countries and draws some conclusions about how the cases conform to the contrasting ideal-types model employed in the comparative analysis of welfare state and gender relations.

## CHAPTER TWO: LITERATURE REVIEW

Feminist researchers have amended mainstream welfare state analysis with a feminist comparative approach that bridges gender theory and empirical analysis in order to better understand welfare state effects on gender relations. This field of study has demonstrated how conventional accounts of the welfare state are insufficient because they do not fully explain the large variations in processes and outcomes or the differential treatment between women and men among the welfare states (Lewis 1992; O'Connor et al. 1999; Sainsbury 1996). Mainstream welfare analysis includes the seminal work by Esping-Andersen (1990), which attempted to categorize welfare states based on the variations in content by grouping countries into similar welfare state regime types. By creating an analytic framework that fuses regime-type analysis with feminist theory and research, a fuller understanding of the gendered effects of state, market, and family relations in welfare states can develop. Linking feminist welfare state theory with empirical analysis will provide new perspectives that may advance comparative research in theoretically more advanced directions that better consider and reflect women's lived experiences.

The two major concepts under discussion in my thesis include the welfare state and gender relations. The welfare state can be defined as the institutionalized patterns in welfare state provision and regulation that establish systematic relations between the state, market and family (O'Connor 1999: 12). Orloff defines gender relations to mean "the set of mutually constitutive structures and practices which produce gender differentiation, gender inequalities, and gender hierarchy in a given society" (Orloff 1996: 52). Feminist theory broadly defines gender as a specific social institution that determines the ways in which a culture or society defines rights, responsibilities, and the identities of men and women in relation to one another that is linked to other social institutions (Bravo-Baumann 2000). By conceptualizing gender as a social structure, researchers can better analyze "the ways in which gender is embedded in the individual, interactional, and institutional dimensions" of particular countries (Risman 2004: 429).

To examine how gender models of welfare in different countries produce different outcomes for women, this thesis specifically examines social policies and outcomes affecting women, with particular attention given to employment rates and unpaid care work. Employment implies access to resources and facilitates women's independence and societal acceptance of women in worker roles. Conversely, women's work inside households is not usually classified as economic even though it contributes to marketed production (Orloff 1993). Rudd (2000) argues that the transition to capitalism made the trade-offs between work and home more extreme and increased the perceived social value of work relative to the family.

Contemporary problems of combining work and family are rooted in the rise of capitalist industrialization, which separated work from the home and family and consequently elevated work outside the home (Boxer & Quataret 2000: 121). Skilled work became redefined as paid work external from the home and principally done by men; women were idealized to remain at home as wife and mother, even though many women continued to work (Boxer & Quataret 2000: 121). This "legacy of different economic and familial spheres" has important consequences for gender relations today, and different institutional arrangements for combining work and family cause different variations in men and women's paid employment (Rudd 2000). Furthermore, "the social integration of discriminated groups is determined to a large extent by their labor force participation rate, which is a clear indicator of the power structure within a social group" (Stock 2006: 59).

My conceptual framework reviews feminist theoretical debates about the relationship concerning gender, social rights, and democratic citizenship rights to explain how gender-neutral liberal policy produces gender-specific outcomes in the welfare state. Habermas' deliberative politics provides a background understanding of the often problematic relationship between gender equality, formal liberal rights equality, and welfare state dependencies. My theoretical framework reviews key research and findings in both mainstream and gendered comparative welfare state analysis. Like Habermas, a review of the feminist literature and research findings generally advocates for the construction of new understandings

of democratic citizenship and the gendering of welfare state concepts and dimensions to account for the contradictions women face in the fulfillment of democratic rights with welfare state and market dependencies.

### **Conceptual Framework**

The increase in women's participation in the labor force has not necessarily been adequately matched with the essential social policies that may enable women to combine paid labor and household work. Welfare then is an inherently feminist issue and feminists have a special responsibility to concern themselves with welfare and welfare reforms. To illustrate the welfare debate from a critical gender theory perspective, I first explain and critique Habermas' deliberative alternative for feminist politics followed by a discussion of feminist theory including goals of reconceptualizing citizenship and key welfare state concepts under the principles of care work and independence. Both Habermas and feminist theorists have contested the dominant policy discourse on welfare and the welfare system at large. My research asks which welfare regimes and/or policies value and support women's labor force participation and independence by reconciling work and home for women. Understanding the current debates in feminist theory will help make sense of the complex relationship between welfare state policy and gender outcomes that shape women's employment opportunities and "work-life" situations.

While traditional theory has presumed families to be the primary site of gender relations, feminists have revealed the gendered nature of many other larger social institutions including the labor market and the welfare state (O'Connor 1999: 13). These empirical studies show important interactions between the privatized care of the family, the labor market and welfare regime impact gender relations in democracies (O'Connor 1999; Sainsbury 1996; Daly 2000). Feminist contributions have shown how these social institutions are gendered and directly facilitate the construction of distinctive gendered identities and gendered interests in society (O'Connor 1999: 13). The literature generally argues for the construction of

new understandings of democratic citizenship to account for the contradictions women face in the fulfillment of democratic rights with welfare state and market dependencies.

Feminist scholarship has attributed women's historical exclusion from politics and the public sphere to the structural barriers and dependencies of the labor market and the family as institutions that limit the fulfillment of women's formal democratic rights as citizens (Pateman 1988; Phillips 1992). Gender then is important to democracy because the principles of democratic citizenship assume all individuals in a polity to hold equal claim to individual rights regardless of social relations and social hierarchies (Siim 2000). However, the exercise of citizenship in a democratic polity is often also dependent upon other social relations and outcomes of the market and the family that produce differences in conditions between social groups which in turn interfere with the full realization of formal equality under the principles of democratic citizenship (O'Connor 1993: 505). In order to alter this relationship, feminist scholarship argues that the structural barriers of the family and labor market may be lessened by a pluralist focus on women's agency and political participation through the broadening of citizenship rights along pluralist rather than dualist lines of the male norm (Siim 2000; O'Connor 1993; Maloutas 2006). Because the dominant conception of citizen implies the subordination of particular identities including race, class and gender to the male norm, it is important that the "gender neutral" conception of citizenship be exposed in the realization of gender justice in democracies (Malouta 2006: 77). Siim's (2000) feminist-pluralist approach to citizenship does this by accounting for the interactions of the state, market, and family that shape women's opportunities for agency and autonomy through pluralist forms of citizenship.

The welfare state relates to democratic citizenship rights through the attempts of the state to remedy social inequalities produced by the market and the family that inhibit the realization of democratic ideals toward the full exercise of formal political, civil, and civic rights (Siim 2000; O'Connor 1993; Orloff 1993). Comparative gender analysis of the welfare state recognizes that capitalist societies and welfare state

regimes are structurally dependent upon the structure and conditions of class and gender relations (O'Connor 1993). Thus, in accounting for these interrelated dependencies, many studies have suggested that the contradictions women face in the fulfillment of their democratic private rights may be lessened by an active notion of citizenship that enhances women's power to make claims on the state through active political participation and policymaking (Orloff 1993).

Political theorist Jurgen Habermas' analysis of welfare state relations and his deliberative politics framework dovetail current debates in feminist research and the comparative gender analysis of welfare states. His work attempts to link the interconnections and contradictions between gender and democratic citizenship by proposing his deliberative alternative to the liberal system of rights that bridges private and public rights through the broadening of civic and participatory rights. Habermas (2001) stresses the internal relation between private and public autonomy in order to clear the obscured state of affairs between liberal rights and welfare paternalism that have continued to leave women discriminated and marginalized even as formal equality and the removal of legal barriers give a presumption of gender equality for women (209). He argues that women's individual liberties (private autonomy) are forever at stake if women lack the public liberties (public autonomy) that enable the exercise of women's private rights. To amend the inadequacies of the gender-neutral liberal rights model for feminist politics, Habermas proposes a deliberative alternative to the liberal system of rights in the pursuit of women's full freedom and equality within the liberal rights framework. Deliberative politics views democratic law as legitimate when it is "an instrument for the equal protection of private and public autonomy"; to have private autonomy (individual rights) one must make use of their public autonomy as enfranchised citizens engaged in lawmaking (Habermas 2001: 258).

Historically, liberal feminism and the liberal welfare model stress the equality of men and women and the unimportance of differences based on gender. Both borrow from liberal political thought the idea of

rights, which rest on assumptions of individual autonomy and freedom and a capacity for rational thought (Plumwood 2001: 97). Many feminist theorists argue that liberalism has historically assumed males to be the individuals entitled to these rights (O'Connor et al 1999; Fraser 1989; hooks 2000). Women have only recently been included and accepted as fully human under the notions of liberal rights. By extending these rights to women, it is believed that educational, legal, political and economic equality for women can be achieved.

Liberal feminism as a movement has largely incorporated and uncritically accepted liberal conceptions of individual rights and argued for the extension of these rights to women, even as gender differences remain. To be sure, gains like suffrage and the removal of legal barriers and other provisions of "formal" equality under law have contributed to women's improved status. Yet formal equality is undermined by the inequalities of the market that produce and reinforce race, class, and gender inequalities (Habermas 2001; Siim 2000). It is argued that denying or paying insufficient attention to gender differences has led to new versions of unequal treatment for women (Habermas 2001). Thus, gender-neutral liberal social policies can be blind to the interconnections of gender with the state, market, and family and in this manner produce policy outcomes that are gender specific and not neutral.

Adding to this unequal treatment (through a denial of difference) has been the enactment of social-welfare policies in the areas of social, labor, and family law that attempt to remedy the unequal liberal treatment of persons (Habermas 2001: 209). Feminist theory and activism has continually pointed out how welfare liberalism, like liberal feminist policies, can produce further discrimination for women—not through stressing a policy of sameness but through reinforcing gender stereotypes through a policy of difference (Habermas 2001: 209). This accommodation of gender difference has enabled women to attain some measure of equality, although at the expense of reinforcing and normalizing the stereotypes that lead to discrimination in the first place.

Following this critique, Habermas offers his deliberative alternative to traditional liberal human rights equality upheld by liberal feminism. In his view, the full realization and safeguarding of private autonomy for women can only occur if women's public autonomy as citizens of the nation is fully realized and implemented (Habermas 2001: 210). While it is necessary to remove legal barriers that discriminate against women, simply eliminating such barriers to establish equal opportunity will not do justice to women. The emphasis on equality of opportunity has denied the gender differences that lead to unequal, inegalitarian systems (Habermas 2001). Furthermore, the social-welfare paradigm that seeks to remedy the weaknesses of liberalism by intervening in the private sphere to compensate for the inequalities incurred by liberal capitalism has also led to unequal treatment (Habermas 2001: 210). What is needed is a deliberative model of democracy that enables women to substantially affect politics and the state. Habermas believes women must establish and articulate their voices in order to achieve true equality and recognition under the law (Habermas 2001: 211).

While it is important to incorporate women's concerns and voices within a political public sphere, feminist theory and practice has actively concerned itself with women's agency and autonomy, answering important questions at the heart of the pursuit of gender equality. Habermas argues that women's cultural understandings of themselves have yet to receive true recognition and therefore women's needs cannot be adequately articulated in society. "Thus their political struggle for recognition begins as a struggle over the interpretation of gender-specific achievements and interests" (Habermas 2001: 211). The problematization of gender relations "extend to core private areas and affect established boundaries between private and public spheres" (Habermas 2001: 211). This articulation of gender identity may vary well start with how the concepts of welfare are defined and what interests in society welfare is designed to benefit.

The next discussion concerns the importance of welfare policy discourse, which necessarily affects the welfare policy framework of a given country. Studying the gendered effects and outcomes of social policy has lead feminist theorists to argue for the importance of reconceptualizing and incorporating specific political concepts including citizenship, care work, and dependency which constitute and construct the basis of welfare entitlements for women (Fraser 1989; Siim 2000; O'Connor 1999). These arguments for redefinitions and incorporation of new concepts like care work and dependency will inform my comparative analysis throughout my thesis.

Like Habermas, feminist scholarship has shown how the state's and market's differential treatment of women leads to women's differential access to citizenship. The potential for women's independence in the welfare state is therefore closely linked to democratic citizenship rights (Phillips 1993; Orloff 1993). To account for the structural barriers of the market and family, a broadening of the concepts of democracy and citizenship is essential to women (Orloff 1993). The construction of new understandings of democratic citizenship entails a reconceptualization and broadening of citizenship rights that accounts for the contradictions inherent in gender relations and the fulfillment of democratic rights with welfare state dependencies (Siim 2000).

Hirschmann and Liebert (2001) attempt to bridge feminist theory and comparative gender analysis of social welfare politics. They argue for the need to combine theory and practice, a common goal of feminist theory, noting that there has been few systematic empirical or comparative research on gender issues informed by feminist theory (Hirschmann & Liebert 2001). Theory can contribute to empirical welfare research by defining the normative assumptions apart from empirical analyses, answering key questions of identity in the population studied, as well as fostering discourse analysis—how language and meaning create political outcomes across ideologies and geographical regions (Hirschmann & Liebert 2001: 5). Theory raises important questions about the concepts used by policymakers and empirical social

scientists like the state, justice, rights, freedom, dependency, citizenship, welfare, the meaning of work, etc. and provides normative and political evaluations of these definitions that question the supposedly neutral standards used in mainstream social policy. New perspectives that link feminist welfare state theory with empirical analysis may advance comparative research in theoretically more advanced directions that better consider and reflect women's lived experiences. For example, Hirschmann and Liebert's (2001) redefinition of the dominant understandings of freedom found in political theory for a more complicated and multifaceted understanding that accounts for the racism and sexism inherent in welfare policies and attitudes that both shape and confine women's needs while also interlinking related concepts such as rights and care work (85). As Orloff argues, gender should be linked with the core concepts of research on the welfare state; it cannot simply evaluate what welfare does or does not do for women (Hirschmann & Liebert 2001: 85; Orloff 1993).

Siim (2000) argues for a feminist-pluralist approach that connects women's agency with projects to construct new pluralist understandings of democratic citizenship. Her analysis argues that political participation and representation are integral to the rethinking of social rights with democratic citizenship (Siim 2000: 42). Her gender-sensitive framework for the comparative study of citizenship analyzes the interaction between women's agency, political discourse and political institutions in France, Britain and Denmark (Siim 2000). Siim's comparative framework shows how women's access to democratic citizenship is connected to their ability to exercise agency and active participation in the political public sphere (Siim 2000). The relationship between women's structural barriers and agency may be rectified by new understandings of democratic citizenship under pluralist lines.

Orloff's (1996) research also contributes to a gender sensitive reconceptualization of democratic citizenship. It focuses on the development of multiple dimensions of variation for the study of gender relations through an analysis of previous research and provides recommendations for further analysis to

explain cross-national variation in policies and outcomes affecting gender relations in multiple welfare states over time and across regions. She proposes a redefinition of “gendered interests” and a specification of the dimensions of social provision and other state interventions relevant for gender relations that will direct further research (Orloff 1996: 69). Essentially, state policies affecting gender relations must be assessed under specifically gendered dimensions based on an adequate understanding of gender interests. Using poststructuralist theory, Orloff defines gender interests as a matter of understanding “how the character of different welfare states’ policies both shapes and is shaped by the content of women’s and men’s gender interests and how these change over time and vary within and across countries” (Orloff 1996: 70). Gender interests determine how a particular gender’s interests are constituted, and because women have long been excluded from the policymaking that shapes and structures their incentives to work for pay and bear children, political power and participation should be considered in any definition and analysis of gender interests (Orloff 1996: 70). Other dimensions include the structure of legal personhood, the basis for rights of the individual, the social organization of work, legal frameworks (particularly with regard to “body rights”), and the organization of state-market as it relates to gender relations through its affects on women’s labor force participation, access to paid work, and access to social services (facilitating employment) (Orloff 1996: 71).

Orloff (1993) recommends and reconstructs three dimensions of qualitative variation that incorporate gender including the state-market relation dimension, which examines the ways states incorporate the family in welfare provision: the stratification dimension considers the welfare state as its own system of stratification that shapes state social provisions that in turn order social relations like gender and determine the value of paid and unpaid labor; and the social citizenship rights/decommodification dimension which is criticized for ignoring the gender division of labor and reworked to include caring and domestic work (Orloff 1993). In addition, she argues for the incorporation of two other gendered dimensions needed to properly analyze the states’ effects on gender relations. Decommodification, the

degree to which individuals are “protected from total dependence on the labor market for survival” is reworked to incorporate gender interests by including access to paid work and services that facilitate employment and autonomy (Orloff 1993: 318). The first dimension analyzes the extent to which the state guarantees women paid employment—a decisive source of women’s economic and political power (Orloff 1993: 322). Orloff goes a step further to include women’s capacities to form and maintain autonomous households as a second dimension because it is linked to questions of political power that go beyond the state’s decommodification of labor that is not linked to caring and domestic work. “Even if state provision enables individual women to leave oppressive situations, this does not embody a true social right—as opposed to a social benefit or an unintended consequence of backing up the family wage system—if it is not coupled with women’s political participation and power” (Orloff 1993: 322). The broadening of citizenship rights may increase the potential women have to incorporate their concerns in social programs that affect their lives (Orloff 1993). The struggle over the value and meaning of care work and unpaid labor—issues closely connected to women’s autonomy and agency—may be resolved through avenues that increase women’s political power (Orloff 1993: 322).

A review of feminist scholarship demonstrates how material, social, and participatory/political rights must be included in a feminist comparative analysis of the welfare state. The underlying goal of my research is to examine how welfare state social policy structures women’s opportunities for autonomy or dependence. A gender sensitive framework of citizenship may remedy some of the contradictions inherent in welfare regimes for women and ultimately bring about more gender equity through institutional means by a reconceptualization of citizenship rights that may account for market inequalities and social responsibilities and dependencies of the family affecting women (Siim 2000). A feminist comparative analysis of welfare states should combine new pluralist understandings of citizenship rights with new conceptualizations of welfare state concepts including care work, dependency, and access to paid work.

## **Theoretical Framework**

As a starting point for comparative analysis, many feminist analyses of the welfare state amend Esping-Andersen's welfare state typologies to include gender relations as a variable. Esping-Andersen's seminal work on welfare states argued for a reconceptualization of welfare state research from the study of state expenditure to the study of the differences in policy content between welfare state regimes types (Esping-Andersen 1990: 21). To do this, he assessed variations in social rights and other dimensions of welfare-state policy that lead to different arrangements between state, market, and the family (Esping-Andersen 1990). The three welfare regime types identified include: the social democratic model includes the countries Sweden and Norway that integrate state and economic policy, promote full employment for citizens, and emphasize universal rights catered to the middle class; the conservative-corporatist model grouping countries such as Austria, France, Germany, and Italy that links employment-based social rights to class and status through varieties of social insurance (promoting status differentiation), provide state and market integration, and social services targeted to the maintenance of the traditional family; and the liberal model of countries including the U.S., Canada, and Australia that subordinates state intervention in the market, thus offering income and/or means-tested assistance, modest benefits with strict entitlement rules culminating into a relative “equality of poverty” among recipients, minimizing the de-commodification effects apart of social rights and welfare state goals (Esping-Andersen 1990: 27).

The comparative gender analysis of the welfare state has pointed to the inadequacies of Esping-Andersen's focus on the class dimension of welfare state formation and stratification due to its disregard for other important explanatory variables of the welfare state such as gender and/or race. O'Connor, Orloff, and Shavers' work contributes to the new and growing body of comparative work on welfare states and gender relations by employing Esping-Andersen's welfare regime typologies and incorporating a multi-dimensional, gender analysis of welfare state variation (O'Connor et al. 1999: 20). To understand “the relationship between social policy and gender relations in an era of economic restructuring and

associated policy changes” the authors identify three policy areas that affect gender relations—the labor market, income maintenance, and the regulation of reproduction (O’Connor et al. 1999: 9). Arguing that gender issues figure prominently in welfare states and are interlinked with other social relations such as class, race, and nationality in different groups of men and women, the authors develop a supplemented regime-type framework using a multi-dimensional approach that accounts for other variables affecting gender including social rights, the gendered basis of legal personhood, the sexual division of labor, gender differentiation (the reinforcement of the gender division of labor), and gender inequality (differences in access to valued resources), and gender roles (O’Connor et al. 1999: 30). By creating an analytical framework that fuses regime-type analysis with feminist research and including gender within the context of other social relations rather than “separating gender out” as in other comparative studies of welfare states, it is argued that a fuller understanding of the gendered effects of state, market, and family relations in welfare states may develop.

Orloff’s (1993) work concerns the reexamination of social rights of citizenship within the comparative analysis of gender relations and welfare states. She argues that the literature and theory of social rights considers the ideal-typical citizen and worker to be male and that his ties to and participation in the labor market were dependent upon his political rights and identities. The assumption of an economically independent citizen using the male standard has informed state social provision and citizenship qualifications for provision and should therefore be reconceptualized to consider the gendered nature of social rights (Orloff 1993: 309). She argues for a “gendering” of “power resources” analysis for assessing social policy by amending and incorporating new dimensions: the state-market-family relations dimension incorporates families in the provision of welfare along with states and markets, the stratification dimension is broadened to incorporate the effects of social provision on gender relations (in the states’ treatment of paid and unpaid labor, access to employment, capacities to form autonomous households), the social citizenship rights dimension must consider the differences in men and women’s

benefits and access to political rights due to different social standings and the sexual division of caring and domestic labor that may inhibit women's capacities to exercise citizenship rights (Orloff 1993:323).

Pascall and Lewis (2004) seek to develop criteria for a truly gender equal welfare model based on elements of gender regimes including paid work, care work, income, time, and voice and elements of a dual earner-dual carer model systemic view of provision and income based on households or collectives rather than individuals. They argue that no widespread reconstruction of the welfare system has developed despite the structural challenges and transformations in the family, economy, and state that necessitate new gender models away from the declining male breadwinner/female carer model underpinning traditional welfare policies and the dual worker welfare model of Central and Eastern European (CEE) countries. The concept of market individualization is argued to have challenged the structure of welfare states in that it tends to ignore collective solutions to individual economic insecurity and policies that reconcile work and care (Pascall and Lewis 2004: 374). Arguing that market-based democracy has produced a new gender order that must reconcile dilemmas of paid work and unpaid care work, the authors call for a dual-earner-dual carer model of gender with citizenship-based on entitlement that would facilitate employment and bring men into care work while also recognizing the need for social provision at the household level (Pascall and Lewis 2004: 378). It is additionally argued that only Scandinavian welfare states approach the gender equality assessed across the dimensions of paid work, care work, income, time, and voice where low gender pay gaps and greater equality in domestic work is common (Pascall and Lewis 2004: 379). They also point to the growing awareness of the need to intervene at the household level rather than the individual level to enable gender equality more fully (Pascall and Lewis 2004). Within the chosen dimensions, paid work includes sex discrimination policy and equal pay legislation; income includes equal opportunity work, pay, type of work, equal rights to pensions and benefit incomes and policies to bring incomes to carers; care work includes paid shared parental leave policies, compensating care work through basic income in order to politically recognize

and value such work; in terms of time, principles of flexibility and fairness should be a part of policies that equally value part-time work, time controls in households, transformations in paid work, a shorter working week, along with school scheduling to match work times, holiday and after-school services, family leave, flexible parental leave, and time convergence policies in tax and benefit systems; voice refers to women's agency and political representation and participation including recourse to the courts, the development of social movements representing women's interests, proportional representation, quotas and women's organizations in parties and politics in general (Pascall and Lewis 2004).

O'Connor, Orloff, and Shaver's (1999) research examines the effects of income maintenance programs on gender relations in each of the four liberal welfare regimes (the US, the UK, Australia, and Canada) using their analytic framework of gender stratification (social provision through the treatment of paid and unpaid labor) and differentiation (the reinforcement of the gendered division of labor through the processes of claiming benefits as well as the different programs focused for households and individuals) (O'Connor et al. 1999). The research assesses each state based on gender dimensions including old age benefits, unemployment, single parenthood, family needs, and support to care giving. The four states differed in the capacities they granted the genders to maintain an autonomous household, with Australia and Britain exhibiting higher rates of housewifery and part-time versus full-time work, breadwinners in households receiving the majority of social provision, while single mothers possessed the ability to maintain an autonomous household without participation in the labor market for a period of time (O'Connor et al. 1999: 155). The US did not allow parents to maintain a household without labor market participation (although the market did offer wages capable of maintaining independent households through antidiscrimination policy), while Canadian policy was shown to be moving toward partial work requirements (O'Connor et al. 1999: 155).

Diane Sainsbury (1996) analyzes the consequences of different welfare states and social policies for women and tracks policy change from the late 1960s to the present day. She categorizes welfare state variation between the USA, the UK, the Netherlands, and Sweden based on 11 different dimensions including the proportion of national income devoted to social provision, level of benefits, range of statutory benefits and services, coverage of the population, dominant type of program (selective versus universal), programs preventing need, commitment to full employment (extent of training, job placement services or simply unemployment services), type of financing (contributions from employers, employees, insured persons), the role of private organizations, and ideology of state intervention and distribution based on needs (Sainsbury 1996). Rather than amend Esping-Andersen's welfare typologies with gender dimensions, Sainsbury opts to analyze welfare states based on two contrasting ideal types: the male breadwinner model and the individual (separate gender roles) model to highlight gender separately (Sainsbury 1996: 41). She assesses whether the four countries vary around specific dimensions including familial ideology, entitlement, bases of entitlement, recipient of benefits, unit of benefit, unit of contributions, taxation, employment and wage policies, and organization of care work (Sainsbury 1996: 42). A focal point of the research concerns the bases of entitlement for women (as mothers, wives, citizens, or workers), which constitutes a crucial factor that determines women's capacity to achieve a socially acceptable standard of living independent of the family (Sainsbury 1996: 43). She assumes that entitlements based on citizenship may alter gender relations in social provision more than entitlements based on paid work, need, or domestic roles (Sainsbury 1996).

Sainsbury analyzes women's entitlements as wives under the breadwinner model and to what extent this model is reflected in the four case studies along with women's entitlements and social rights as mothers and caregivers and the degree to which the states facilitate solo mothers fulfilling dual roles as earners and caregivers (Sainsbury 1996). Her findings indicate the breadwinner model's strong influence upon the Netherlands, the UK, and the USA but not Sweden. Women's entitlements as workers are also assessed.

Sainsbury's findings show that the increased labor market participation rates of women over the last three decades have altered the nature of social entitlements: Swedish women enjoyed stronger entitlements based on citizenship and care while labor market status largely determined women's entitlements in the other three countries (Sainsbury 1996: 125). Her findings additionally show how entitlements based on need and work disadvantage women due to their disadvantaged position in the labor market while systems based on universal or citizenship claims produce more beneficial outcomes for women (Sainsbury 1996).

To assess the redistributive effects of cash transfers and taxation in the German and British welfare systems between men and women across the life-course Mary Daly's (1993) research examines whether the conditions of both states' programs could be empirically identified as gender-stratified. Access, the structuring or ordering of claims, and the financial treatment of claims are assessed at the individual level and household levels between the countries with gender at the both levels causing stratification in both countries, Germany with stronger male-female differences qualifying on all three dimensions (Daly 2000: 124). Findings show that it is the British welfare system that goes further in equalizing incomes between women and men as individuals because the German systems allocates benefits and transfers to the main income-earner and that this can account for greater income gaps between men and women in Germany (Daly 2000: 153). Another key finding in Daly's research is the different treatment of individuals against households in the two welfare states, with Germany featuring less income disparity among households than among individuals (Daly 2000: 153). Findings on the relationship between poverty and gender cross-nationally links the differences in social policy programs to poverty levels, with the German model aimed as poverty reduction while the British model aimed toward poverty alleviation. Cash transfers are assessed between households and individuals and it is shown how these systems' allocation procedures act to shape and redistribute poverty risks between men and women: at the household level, women's households are shown to have double the poverty incidence as men's in both countries and German women's households were more likely to be disadvantaged relative to men's yet redistribution through the

family is a main defense against poverty in Germany as opposed to Great Britain; at the individual level, sex-poverty differentials are higher in both countries, although German women fare worse (Daly 2000: 181-2).

I found Sainsbury's gender dimensions and analysis to be the most useful and rich. The organization of women's entitlements based on their roles as wives, mothers, workers, needs-based welfare recipients, and/or citizens seemed to highlight gender inequality and variability for each states' welfare system; additionally it helped to show how entitlements based on citizenship may enable women to attain more equality both individually and collectively along with benefiting solo mothers along with incorporating men into care giving roles through policy arrangements. Clearly, welfare states that base entitlements on work, need, or marital status advantage and disadvantage women in different ways that stratify gender inequality differently depending upon the policies while reinforcing women's assumed role as primary caretaker on top of unequal labor market conditions. The articles differ on some of their dimensions and welfare state typologies. Sainsbury argues for analyzing states' based on the ideal types of the male breadwinner model and the opposing individual model while O'Connor et al. argues for gendering Esping-Andersen's welfare types and accounting for other social relations such as race and class of differentiate groups of men and women. In addition, Sainsbury neglects labor markets and labor market regulation along with the regulation of reproduction, and these dimensions will be incorporated in my research model. A feminist comparative analysis of welfare states should combine new pluralist understandings of citizenship rights with new conceptualizations of welfare state concepts including care work, dependency, and access to paid work. Women's opportunities to balance paid and unpaid labor is structured by welfare state provision and the social stratification of the state, market, and family.

The qualitative categorization of welfare regime typologies created by Esping-Andersen supplemented by a gender-sensitive perspective informed by current topics in feminist theory and methodology will

provide a useful starting point for my comparative analysis. The ways in which concepts in welfare states inform outcomes along with cross-national differences in gender roles, identities, and interests will be tied to these variables and included in my analysis. It is clear that a new conceptual framework transformed by findings and debates in feminist theory will be analytically useful in examining the mutual effects between welfare states and gender relations through comparative research. For example, my focus on women's labor force participation rates (outcomes) cross-nationally will incorporate variables like the historical and regional differences in welfare regime types, and the differences in gender relations including the sexual division of labor, policies affecting access to employment, and policies affecting paid and unpaid labor and the different conceptions of social citizenship rights. The conceptual work apart of my empirical analysis and case studies should be equally important because mainstream analyses of welfare states have neglected the influence of gender relations and identities in the formation and outcomes of welfare states cross-nationally and overtime (taking a "neutral"—or liberal theoretical view of the state and market). The research refashions old concepts and creates new conceptual "gendered" categories and analytic dimensions of the welfare state and therefore transforms the way welfare states are viewed and examined.

## **CHAPTER THREE: METHODOLOGY: WELFARE STATE VARIATIONS AND GENDER OUTCOMES**

My research question examines how different welfare state models structure and affect gender relations for women. Because welfare states have not historically conceptualized women as separate from men, democracies have dealt with gender inequality in different ways, accommodating or perpetuating gender difference through policy. My research seeks to understand the interactions between gender relations and democracy in three states using a comparative analysis framework that incorporates gender into the welfare state regime concept. Systematically looking at how the structure of welfare state provision affects outcomes for women will enhance our knowledge of the ways in which the varieties of gender regimes apart of welfare states accommodate or perpetuate women's inequality in democracies.

To analyze the relationship between welfare states and gender, I identify several dimensions of variation in policy relevant to gender and categorize the dimensions based on a dual ideal-type model of gender policy. I employ a contrasting ideal dual framework (male breadwinner/female carer model vs. dual-earner dual-carer model) borrowed from both Sainsbury's (1996) contrasting ideal-type model and Pascall and Lewis' (2004) gender equality model. Orloff's (1993) recommendations will provide the criteria upon which to select my chosen gendered dimensions of variation in welfare state policy. Gendered dimensions of welfare state variation informed by Orloff's analysis include bases of entitlement, pension, health care, unemployment insurance, and the organization of care work. My chosen dimensions of welfare state variation in outcomes upon gender include female labor force participation rates, pay equity rates between the sexes, female poverty rates, and female unemployment rates. An ideal framework will allow me to compare real world gender policies and outcomes in welfare states and categorize them based on how much they conform to an ideal continuum model of gender relations. A gendered ideal dual model measuring gendered dimensions of variation may remedy mainstream welfare state analysis by accounting for the neglected dimensions relevant to both gender and the welfare state.

Mainstream analysis of the welfare state has concentrated on individuals, households, occupations, classes, or generations as units of analysis while excluding both sexes from the analysis (Sainsbury 1996: 34). Feminist research has called attention to the gendered nature of social policies and programs that have produced outcomes that advantage and/or disadvantage women in complex and often unforeseen ways (Sainsbury 1996: 35). The critiques have also shown how key concepts and assumptions in mainstream welfare analysis are gendered by the way in which the conceptions take only men's experience into account (Sainsbury 1996: 37). In another line of thinking, Bussemaker and Kersbergen (1994) point out that mainstream analysis has not deliberately excluded gender from the analysis but has rather privileged class and capitalist market relations to explain the development of social rights. "As a result, mainstream comparative analysis tells us little about how women have fared in different welfare states or about dissimilar policy outcomes for women and men" (Sainsbury 1994: 2). Thanks to a renewed interest in the experiences of women, feminist efforts to incorporate gendered policy dimensions with gender outcomes has brought women's relationship to the welfare state into visibility and offered new knowledge and insight to mainstream welfare state analysis.

### **Ideal Dual Framework**

Rather than blanket all feminist criticisms and generalizations of the welfare state together theoretically, the comparative feminist analysis of the welfare state relations seeks to reformulate these generalizations as possible welfare state variations affecting gender (Sainsbury 1996: 41). Sainsbury (1996) argues that these generalizations involve many dimensions of variations relevant to gender including familial ideology of the state and its influence on policy, the sexual division of labor in the family and market, and the value of paid work relative to unpaid work through social policy (41). Gendering dimensions of variation can then be taken together to create a framework based on patterns of gender policy that create distinct gender policy regimes (Sainsbury 1999: 5). A gender regime can be characterized as the specific policy arrangements between the state, market and family that produce specific gendered policy logics

unique to a given state. Gender regimes create variations in gender relations and outcomes through the specific cultural and institutional structure and policy arrangements adopted by the state (Crompton et al. 2007: 4).

Rather than amend Esping-Andersen's welfare typologies with gender dimensions, Sainsbury's research opts to analyze welfare states based on two contrasting ideal types: the male breadwinner model and the individual model to highlight gender separately (Sainsbury 1996: 41). Her work examines comparative variations in four countries around specific dimensions including familial ideology, entitlement, bases of entitlement, recipient of benefits, unit of benefit, taxation, employment and wage policies, and the organization of care work (Sainsbury 1996: 42). A focal point of the research concerns the bases of entitlement for women (as either mothers, wives, citizens, or workers), which she argues constitutes a crucial factor determining women's capacity to achieve a socially acceptable standard of living independent of the family (Sainsbury 1996: 43). Sainsbury's (1996) findings demonstrate how entitlements based on need and work can disadvantage women due to their disadvantaged position in the labor market; how women's entitlements as wives tends to support the gendered division of labor and the family wage a part of the male breadwinner model; and how women's entitlements as mothers and citizens may provide an acceptable standard of living independent of family relationships.

To study welfare state variation's effects upon women, I borrow from Diane Sainsbury's work the two contrasting ideal-types framework. The dual ideal-type framework, based on two contrasting gender regime types, provide a measure to analyze the extent to which chosen countries conform or deviate from the gender regime models. Sainsbury argues that in order to examine the relationship between welfare state variations and gender, a reconceptualization of gendered concepts and assumptions is necessary to mainstream welfare state research. Using this framework, I will assess whether my case studies vary around specific gender dimensions of variation including bases of entitlement, pension, health care, and

the organization of care work. Like Sainsbury, a focus of my analysis will include women's bases of entitlements under the two contrasting ideal-types in order to reveal what extent either model is reflected in the three countries studied. The bases of women's entitlements according to women's roles include entitlement as wives, mothers, citizens, and/or workers. Sainsbury's framework speaks to my selected dimensions and my research question by highlighting how different entitlements based on women's roles creates incentives and disincentives to work, influencing women's employment opportunities.

Pascall and Lewis (2004) develop criteria for a truly gender equal welfare model based on elements of gender regimes including paid work, care work, income, time, and voice and elements of a dual earner-dual-carer model systemic view of provision and income based on households or collectives rather than individuals. The authors argue that no widespread reconstruction of the European welfare system has developed despite the structural changes and challenges in the family, economy, and state. Because the male breadwinner/female carer model underpinning traditional welfare policies has widely declined, new gender orders addressing the realities of gender relations are needed (Crompton 1999; Pascall and Lewis 2004). The authors propose an ideal type gender regime with which to envision and construct new alternatives that reconstruct the outmoded male breadwinner/female carer model underpinning traditional welfare policies and the dual worker welfare model of Central and Eastern European (CEE) countries. The concept of market individualization is argued to challenge the structure of welfare states because it tends to ignore collective solutions to individual economic insecurity and policies that reconcile work and care (Pascall and Lewis 2004: 374). Arguing that market-based democracy has produced a new gender order that must reconcile dilemmas of paid labor and unpaid care labor the authors recommend a dual-earner-dual carer model of gender based on citizenship as entitlement that would facilitate employment and bring men into care work and recognize households' needs for social provision (Pascall and Lewis 2004: 378). It is also argued that only Scandinavian welfare states approach the gender equality assessed across the dimensions of paid work, care work, income, time, and voice where low gender pay gaps and

greater equality in domestic work is common (Pascall and Lewis 2004: 379). They also point to the growing awareness of the need to intervene at the household level rather than the individual level to enable gender equality more fully (Pascall and Lewis 2004). Within the dimensions, paid work includes sex discrimination policy and equal pay legislation; income includes equal opportunity work, pay, type of work, equal rights to pensions and benefit incomes and policies to bring incomes to carers; care work includes paid shared parental leave policies, compensating care work through basic income in order to politically recognize and value such work; in terms of time, principles of flexibility and fairness should be a part of policies that equally value part-time work, time controls in households, transformations in paid work, a shorter working week, along with school scheduling to match work times, holiday and after-school services, family leave, flexible parental leave, and time convergence policies in tax and benefit systems; voice refers to women's agency and political representation and participation including recourse to the courts, the development of social movements representing women's interests, proportional representation, quotas and women's organizations in parties and politics in general (Pascall and Lewis 2004).

The ideal dual model will be analytically useful in answering how my chosen dimensions of welfare policy enhance or limit women's independence with their ability to balance career and domestic labor. To do this, the framework will compare and contrast gender policy based on an ideal continuum of extremes that will better explain how specific welfare policies affecting gender align with the two extremes in gender arrangements. I will then aggregate the policy dimensions results for each state in order to categorize states based on the extent to which they conform to the contrasting ideal gender models. Because gender is an interrelated institution produced by yet also shaping other institutions like the state, market, and family, gender as a concept should be isolated separately in order to analyze welfare state variation upon gender relations. Sainsbury (1996) argues that analyzing gender variation and outcomes is more difficult when gender is combined with a single ideal type or policy regime framework because

gender is not specifically accounted for in the dimensions selected in mainstream analysis (44). The other models used in welfare state analysis exclude the family as an institution and are therefore inadequate in terms of conceptualizing and measuring the interrelations between the state, market and family affecting gender relations in welfare state analysis (Sainsbury 1996: 44). A gendered ideal dual framework can remedy mainstream welfare state analysis by accounting for the neglected dimensions relevant to gender. By separating gender out, gender can be reintegrated into traditional welfare state measures to account for the interdependence of the state, market, and family in welfare state variation.

Analyzing welfare state variations across three countries will allow me to determine how and why my selected cases conform or deviate from the contrasting ideal type model. The dual model is based on two contrasting ideal types of gender arrangements: the male breadwinner model and the dual-earner dual-carer model. These two gender models carry different implications for women through the ways in which the gender regimes structure women's opportunities for autonomy versus dependency in society. The male breadwinner model assumes the family and market to be natural providers of welfare, subordinating women's status as dependents in the provision of welfare to the man's through full-time employment and the family wage, producing a gendered division between the public and private social spheres (Sainsbury 1996: 41-3). Benefits are traditionally based on women's roles as wife and mother, rather than worker or citizen (Sainsbury 1996).

In contrast, Pascall and Lewis' (2004) citizenship version of the dual-earner dual-carer model conceptualizes an opposing ideal type in which paid and unpaid work are equally valued and shared between men and women underpinned by social rights. The ideal gender policy model emphasizes gender equality across key elements of gender regimes including paid work, care work, income, time and voice underpinned by values aiding gender equality. The essential basis of entitlement to benefits is citizenship (as opposed to other identities including worker, mother, and wife) and its advantage lies in the way "it

privileges neither earning nor caring and thus accommodates the shared task of earner and carer” (Sainsbury 1996: 42). Thus, the dual ideal model examines the degree to which state policy in my three cases accommodate or perpetuate gender inequality through social policy.

The ideal dual model better conceptualizes gender by emphasizing gender in the construction of a dualistic continuum that better reflects how states construct gender relations through policy that may enhance or limit gender inequality. Although the welfare state is traditionally conceived as gender-neutral, it has historically structured benefits and produced different outcomes for men and women, and a gendered regime model can separately highlight patterns of gender relations that are central to the welfare state. It better conceptualizes the trade-offs women face in seemingly similar countries with different gender regimes. Looking at how state policies in three chosen cases conform along a dualistic gender continuum will expose significant variation in gender content and outcomes. By separating gender out rather than amending gendered dimensions to gender-neutral mainstream frameworks, the dualistic continuum will also examine the interaction between gendered dimensions and traditional measures of welfare state variation important to mainstream analysis (Sainsbury 1996: 43). The model will also enable my research to assess the bases of entitlement to benefits and link entitlement-bases with institutional dependencies of the state, market, and/or family. A central argument to the research is that entitlements based on citizenship in the dual-earner dual-carer model alter gender relationships because these entitlements do not depend on dependency-reinforcing effects of needs-based and worker-based entitlements upon the market and family (Sainsbury 1996: 46). Entitlements based on citizenship essentially bypass the gendered division of social rights “by eliminating a gendered differentiation in access to benefits” (Sainsbury 1996: 46, 147).

### **Gendered Dimensions of Variation: Policy and Outcomes**

My choice of gendered policy dimensions is informed by Orloff's reconstruction and gendering of traditional welfare state dimensions and concepts. Orloff (1993) recommends and reconstructs three dimensions of qualitative variation by incorporating gender: the state-market relation dimension is reconstructed as the state-market-family dimension in order to examine the ways states incorporate the family in welfare provision; the stratification dimension considers the welfare state as its own system of stratification that shapes state social provisions that in turn order social relations like gender and determine the value of paid and unpaid labor; and the social citizenship rights/decommodification dimension is reworked to include the gender division of labor and caring and domestic work apart of social rights (Orloff 1993). In addition, she argues for the incorporation of two other gendered dimensions needed to properly analyze the states' effects on gender relations. Decommodification, the degree to which individuals are "protected from total dependence on the labor market for survival" is reworked to incorporate gender interests by including access to paid work and services that facilitate employment and autonomy (Orloff 1993: 318). Access to paid work analyzes the extent to which the state guarantees women paid employment, a decisive source of women's economic and political power (Orloff 1993: 322). Orloff also includes women's capacities to form and maintain autonomous households as a second dimension because it is linked to questions of political power that go beyond the state's decommodification of labor that is not linked to caring and domestic work. "Even if state provision enables individual women to leave oppressive situations, this does not embody a true social right—as opposed to a social benefit or an unintended consequence of backing up the family wage system—if it is not coupled with women's political participation and power" (Orloff 1993: 322). The broadening of citizenship rights may increase the potential women have to incorporate their concerns in social programs (Orloff 1993). The struggle over the value and meaning of care work and unpaid labor—issues closely

connected to women's autonomy and agency—may be resolved through avenues that increase women's political power (Orloff 1993: 322).

These gendered dimensions of variation are important variables that measure the way welfare states stratify and order social relations like gender. My chosen dimensions of welfare state variation will include bases of entitlement, pension, health care, unemployment insurance, and the organization of care work. These indicators are important to gendered welfare analysis because they reveal the extent of gendered policy that enables women to enter paid labor, form and maintain an autonomous household, and balance paid and unpaid household labor. The bases of entitlement serves as an important dimension in examining the quality of social rights for women based on their roles as wives, mothers, workers, or citizens. As feminist theories point out, the bases of entitlement to welfare are decisive in determining whether policies reinforce or transform existing gender relations (Sainsbury 1994: 1).

A key determinate of the nature of gender inequality in welfare state policy is the basis of entitlement to cash transfers and other welfare provisions and services (Sainsbury 1996; O'Connor et al. 1999). To understand how social policy addresses and maintains gender roles, I examine women's bases of entitlement to benefits. The bases of women's entitlements according to women's roles include entitlements as wives, mothers, citizens, and/or workers. In order to best categorize welfare states under the two contrasting ideal-type gender model, women's bases of entitlement are a primary explanatory variable to consider. Sainsbury (1996) has demonstrated how women's roles determine the different entitlements that therein create incentives and disincentives to work, and influence women's abilities to balance employment and care work. The basis of entitlement to benefits varies cross-nationally. Entitlement bases have also been distinguished based on an individual/collective unit divide: benefits granted on the basis of the family involves the transfer of provisions to one member on behalf of the family, typically the breadwinner, thereby constructing or reinforcing power relations between the family

and reinforcing the gender division of labor within the family (Daly 2000). Entitlement benefits allocated to the unit of the individual typically reduce gender inequality and facilitate women's independence and employment, essentially "defamilizing" welfare provision (Daly 2000).

Beyond the individual/collective measure, women's entitlement to benefits on the basis of social role may provide a more complete picture of how welfare state structure affects gender relations and outcomes. Sainsbury's work goes further than the individual/collective categories to ask whether claims to benefits originate through marriage, care, employment, and/or citizenship. This categorization examines the extent to which women's opportunities are shaped by the state, market, and/or family and how the interaction between social institutions produce different outcomes for women.

My chosen dimensions of outcomes upon gender include female labor force participation rates, pay equity rates between the sexes, female poverty rates, and female unemployment rates. These outcome dimensions and their variation matter for gender because they provide a measure of gender inequality produced by the market and the welfare state. Comparing levels of employment across OECD countries will effectively examine the relationship between gender regimes/policies and gender outcomes for women. The outcome measures will explain how gender policy produces considerable variations in conditions for women (or gender outcomes). Outcome variation matters for gender because it provides a measure of gender inequality that may be compared between states. For example, variations in policies supporting women's employment within each gender regime may produce variations in women's labor force participation rates, unemployment rates, pay equity rates, and birth rates among the examined cases.

## **Conclusion**

Historically, welfare states have not conceptualized women as equal to men and this absence has implications for gender inequality in democracies. My research seeks to understand how different democracies have dealt with gender inequality institutionally to uncover the relationship between gender policy and variations in gender outcomes in welfare states. The institutional structure of the welfare state can explain variations in gender outcomes. As an alternative framework, the ideal dual model better conceptualizes gender by emphasizing gender in the construction of a dualistic continuum that reflects how states construct gender relations through policy that may enhance or limit gender inequality. It better conceptualizes the trade-offs women face in seemingly similar countries with different gender regimes by separating gender out while incorporating and analyzing dimensions of welfare state variation relevant to gender. Indicators of gender outcomes including labor force participation rates, pay equity rates, unemployment rates, and poverty rates will measure how variations in gender policy lead to variations in gender inequality and conditions for women among the cases. A review of the feminist literature and research findings generally advocates the construction of new understandings of democratic citizenship and the gendering of welfare state concepts and dimensions to account for the contradictions women face in the fulfillment of democratic rights with welfare state and market dependencies. Systematically looking at the structure of welfare state provision and outcomes through a gender-relevant framework will enhance our knowledge of the ways in which the varieties of gender regimes accommodate or perpetuate women's inequality in democracies.

## **CHAPTER FOUR: FAMILY AND CARE-BASED GENDER POLICY IN GERMANY**

Feminist adoption of the comparative perspective has shown the variation of the male breadwinner model across countries and over time. This chapter examines the impact of the male breadwinner model upon gender relations in Germany by using gender-relevant dimensions of policy analysis frequently neglected in traditional welfare state analysis. The basic argument premises that the relationship between state policies that intervene to support different types of individual and family arrangements affects the stratification of outcomes for women. In this chapter I assess each policy dimension in terms of its correspondence to the dual gender model continuum borrowed from both Sainsbury's (1996) contrasting ideal-type model and Pascall and Lewis' (2004) gender equality model. I then examine the relationship of gender-relevant policy with gender outcomes including female employment and unemployment rates, birth rates, and wage differentials. By analyzing gender-relevant policy in Germany, my analysis measures the extent to which Germany's welfare system conforms or deviates from the dual gender model framework I have selected. The analysis of Germany's gender outcomes will additionally serve to support or disprove my categorization of each case to one of the two gender models.

Germany is a social-capitalist welfare state based on welfare provisions as cash transfers to households rather than direct provision of services, consistently spending over a quarter of its annual GDP on social expenditure (Bussemaker and van Kersbergen 1999: 22). According to Esping-Andersen's welfare regime typologies, Germany is a conservative/corporatist welfare state in which status and occupational differentiation among groups is reinforced due to the separate provisions and distinct programs for different social strata, including women. The welfare regime has been characterized as a "system of social insurance with welfare elements" granting strong rights to income replacement and the general provision of a social minimum referred to as Sozialhilfe, introduced in 1961 as a safety net against poverty (Daly 2000). The conservative-corporatist model includes the countries Austria, France, Germany, and Italy; the

regime type typically links social rights to class and status through varieties of social insurance (promoting status differentiation), while providing state and market integration with social services targeted to the maintenance of the traditional family (Esping-Andersen 1990: 27). “The German welfare state is based, not on maximizing employment, but on providing subsidies to the “outsiders,” who are encouraged to leave the labor market to those who are highly productive” (Pierson 1996). Historically, the West German welfare system afforded women stay-at-home motherhood through generous social benefits targeted at the household/family level and based women’s claims (entitlements) to social provision on motherhood rather than as workers, based on need, or citizenship claims (Daly 2000). Many feminist researchers including Sainsbury (1996) have pointed out that women’s entitlement bases for social welfare advantage or disadvantage women depending upon the social role that claims are based—be it as mothers, wives, workers, based on need, or citizenship that create different conditions of dependency. These factors may well explain why labor force participation rates for women, particularly mothers, in west Germany continue to lag behind east German rates.

As a conservative-corporatist welfare regime, Germany typically upholds the traditional family and thus exhibits a policy logic closer to the male-breadwinner model as opposed to the dual-earner model in terms of a gender model. Conservative-corporatist welfare states use an interventionist policy in order to support and protect the traditional family, mainly through cash transfers to the head of the household which enable married women to provide care in the home (Sainsbury 1999). Women are therefore more likely to remain outside of employment to provide unpaid care work and are excluded from social insurance systems (Sainsbury 1999: 255). A key question the research seeks to answer lies in the way welfare policy constitutes gender interests, that is, how policymaking shapes and structures women’s incentives to work for pay and bear children. A gender model continuum will measure policy variation in Germany and clarify the ways in which the German welfare state constitutes gender interests.

### **Basis of Entitlement**

A key determinate of the nature of gender inequality in welfare state policy is the basis of entitlement to cash transfers and other welfare provisions and services (Sainsbury 1996; O'Connor et al. 1999).

Women's basis of entitlement to benefits according to social role can be used to determine how social policy addresses and maintains gender roles within the welfare state. In order to best categorize Germany under the two contrasting ideal-type gender models, women's bases of entitlement are a primary explanatory variable to consider.

Gender bias or disadvantages in welfare systems tend to differ depending on the basis of entitlement—need, citizenship, employment, or marriage. In the case of Germany, women's bases of entitlement clearly point to the roles of wife and mother, constructing marriage as a dependency-reinforcing institution upon German women. The dominance of the male breadwinner model is observed at all four dimensions of variation: income maintenance, pension, childcare, and bases of entitlement. A variety of policies in Germany allow women to opt out of the labor market for long periods of time, making the state and family dominant in their lives. Many German women are deprived of their social rights through their status as dependents in the family as opposed to gaining social rights through labor market participation or citizenship or principles of care. Pensions are awarded based on labor-market participation and contribution periods, while mothers and fathers are encouraged to leave the labor market during childrearing years through Germany's generous maternal and newly reformed parental leave policies. This welfare arrangement presents a contradiction to parents: opt out of the labor market during childrearing years while at the same time forfeit potential labor market-dependent pension earnings later in life, while public childcare is virtually nonexistent for families up until the age of 3.

## **Maternal and Parental Leave**

Gender bias still exists in Germany in terms of income maintenance programs, while recent reforms toward a social democratic dual-earner dual-care model may modify some disparities between men and women. Family-based social-capitalist welfare states have traditionally provided extensive maternity leave allowances and more recently parental leave which varies in length and typically is less well-paid. Maternity grants help to cover the costs or provide for needs connected to childbirth while parental leave is traditionally designed to compensate income losses following childbirth (Ferrarini 2006). The German welfare state provides full pay for maternal leave but is less generous in its parental leave pay (Bussemaker and van Kersbergen 1999). In terms of the duration of leave, Germany guarantees 14 weeks paid maternity leave and 36 months paid extended parental leave coverage that is means-tested on the household level (the last twelve months are unpaid) (Bussemaker and van Kersbergen 1999: 31). Like other social capitalist states, Germany provides universal provisions for job protection during maternal leave. The German state's maternal and parental leave policies reveal extensive support for women giving birth but is less supportive of women in combining their labor market participation with care work via an inadequate and unequal parental leave policy (Bussemaker and van Kersbergen 1999: 30-2). No form of paternity leave exists in Germany; however, leave for family reasons are offered: ten days per parent for one child and 25 days per parent for two children or more at full earnings (Ferrarini 2006; Bussemaker and van Kersbergen 1999: 31).

Recent reforms in German family law reflect a trend away from the male breadwinner model toward more reforms to increase both fertility rates and female employment rates. As of 2000, a new provision allows both parents to take parental leave at the same time and increased the maximum amount of part-time work from 19 to 30 hours a week with an absolute ban on dismissals during parental leave (Spiess and Wrohlich 2006). Then in 2007, Germany instituted a new social democratic policy reform to its parental leave system, replacing its existing means-tested parental leave benefit with a wage dependent benefit that

replaces 67% of net earnings for the stay-at-home parent for only the first year in order to increase the return-to-work rate of mothers with young children and low fertility rates as compared to other Western European countries (Spiess and Wrohlich 2006). The length of leave was preserved for three years; however pay compensation was reduced to only 12 months. Although both parents are eligible to take leave, mothers are the principle recipients while fathers using parental leave account for only 5 percent (Spiess and Wrohlich 2006). “Here the objective is to provide compensation to middle and high-income parents, who experience a relatively high-income loss due to a birth-related employment break.” (Spiess and Wrohlick 2006: 3). These recent reforms signal a step away from the male breadwinner policy logic of Germany, a conservative corporatist welfare regime, toward a more Scandinavian dual-earner dual-carer model. Whether these reforms will translate into higher fertility rates and greater gender equality is a key question only future studies can answer. Questions about the validity of Germany’s categorization as a conservative welfare state may also increase due to these changes toward a Scandinavian model of family policy.

If the recent policy changes in parental leave are disregarded for the purposes of the data obtained in this study, a breadwinner bias is observed in Germany’s income replacement programs during the twentieth century and the first decade of the twenty-first century: there is strong maternal leave support (albeit short) and weak but extensive parental leave support. Typically, this policy arrangement results in the woman taking leave both because of the sexual division of labor and pay inequities between men and women. Mothers in Germany generally either work part-time or leave the market completely and rely on maternal and parental leave. Women also face a possible loss in earnings because parental leave is not paid in full and may affect women’s access to other welfare entitlements like pension entitlements which may be linked to labor force participation (Bussemaker and van Kersbergen 1999). Inequality between men and women is maintained through the German parental leave policy because women are more likely to claim leave as opposed to men who generally earn more than women and stand to lose more income if

parental leave is claimed. Thus, women's association with domestic work and care is reinforced through German income maintenance policies, which may affect women's abilities to re-enter the labor market following maternal and parental leave. The German income maintenance programs allow women to maintain an autonomous household without participation in the labor market for a period of time, resulting in higher rates of housewifery and part-time versus full-time work. The lack of active labor market policies in the German parental leave system also hinders women from attaining independence outside of marriage and the family. Germany's legacy of a highly gendered structure of family-market relations is likely to influence gender outcomes examined in the second half of the case study for the years 2000, 2005, and 2007 despite recent reforms.

### **Pension**

The German pension system is employment-based and results in a significant gender gap for women due to social responsibilities and career breaks along the life-course that conflict with their labor force participation (Rasner 2006). Individuals with continuous employment tend to be men and are compensated with the same standard of living in retirement as they achieved during work life (Rasner 2006). Employees are required to pay social insurance contributions to accumulate entitlements guaranteeing a public pension at retirement that is based upon the number of years employed, average achieved earnings during work life, and retirement age (Salthammer & Serries 2002). The Germany pension system, instated in 1957, allocate pensions to citizens based on work contributions periods and former earnings that are grouped into different pension package types that results in significant gender stratification (Scheiwe 1994). The German welfare state has historically encouraged stay-at-home motherhood through its policy, with tax and welfare incentives that discourage female employment and do not compensate women's employment interruptions leading to substantial pension inequality between men and women (Daly 2000: 114).

Entitlement to state pensions is acquired through employment and contributions to National Insurance payments required during employment periods (Kolinsky 1993). Contribution periods for access to benefits range from 35 to five years. Up until 1986 women could only qualify for pensions via employment (Kolinksy 1993). A pension claimant must have been employed for 26 years in order to receive full retirement pay; however, women who work part-time are only entitled to part of full time pension based on weekly working hours (Kolinsky 1993). Pensions in Germany have been found to be one-third lower for women than for men (Scheiwe 1994). Employment interruptions for child care are treated more favorably now, with child pension credits of three years per child for the caring parent at the level of 75 percent of average salaries; however, before 1986 care periods of employment interruption for pension compensation were only allocated in the case of maternity leave for a relatively short period of 14 weeks at the level of 30 percent of average earnings (Scheiwe 1994). Disincentives for female employment are built into the child credit regulations because women's own pension contributions cannot be combined with child credits and the regulations are targeted to sustain the stay-at-home motherhood gender norm apart of the male breadwinner model logic (Scheiwe 1994). "The double burden" of a working mother is not recognized by allowing her to accumulate own entitlements and child credits" (Scheiwe 1994: 141).

Pension rights for women in Germany are bifurcated: entitlements are granted based on either market participation or through marriage (Scheiwe 1994). There are no universal social rights to pensions and means-tested welfare benefits are a last resort for some women. However, because pensions are dependent on an individual's employment record, women do not fare well under the German system given that it has historically allocated welfare via the family rather than the individual. Pension rights are linked with employment contribution periods for claimants at the same time much of German welfare policy discourages women from employment and encourages stay-at-home motherhood through child credits for pensions that may both help and hinder women's equality and ability to obtain a socially-

acceptable standard of living independent of the market and/or family. Thus, the German pension system conforms less to a strong male breadwinner model (owing to pension entitlements based on employment) and more to a modified version—a male breadwinner/part-time carer model. The German pension system recognizes employment as a basis for rights to a pension rather than relying simply on marriage as it would under a strong male breadwinner system. However, these employment-dependent benefits do not guarantee women complete financial autonomy because women cannot combine child pension credits while working: child pensions are only awarded to women who suspend employment for stay-at-home motherhood through maternal and parental leave. Pension compensation periods for childcare are not available for women who choose to work and thus, German pension policy creates incentives for women to suspend labor market participation at the same time pension rights are claimed and tied to labor force participation. Financial autonomy is thus sacrificed in the long term through the German pension system.

### **Childcare**

A large body of empirical research in economic theory associates improvements in women's childcare options with increases in women's labor force participation (Nyberg 2004). Childcare services are a great benefit to women: not only do collective services convert care into paid work, affordable public childcare allows women to remain in the labor market. The German welfare state has little state sponsored childcare services for children under 3 years old, owing to the dominance of the male breadwinner model despite EU directives. Only 3 percent of children under the age of 3 use publicly funded child care services in Germany (European Commission Network on Childcare 1996). The German childcare system known as Kindergarten is guaranteed to every child 3-6 years old although these services are generally part-time and do not accommodate the employment of parents (Sainsbury 1999: 38). The lack of childcare for children under three therefore further compels women to take on caring responsibilities in the home or find alternatives in the private sector. Like other social-capitalist welfare states, welfare in Germany is still directed toward the private maintenance of care work through provision systems of benefit rather

than the provision systems of services (Bussemaker and van Kersbergen 1999). Thus, the German welfare system relies on paid maternal and parental leave programs rather than public childcare in order to balance the demands of career and home. However, the lack of childcare policy in Germany is being compensated by new gender equity enhancing reforms including changes in income maintenance meant to enable all working parents to balance career and care work. The lack of adequate public childcare from birth until age 6 constitutes a gender bias for German women who must rely on highly gendered maternal and parental leave schemes that do little to support women's paid employment.

### **Outcomes**

Because welfare states have not historically conceptualized women as separate from men, democracies have dealt with gender inequality in different ways, accommodating or perpetuating gender differences through policy. My case study is designed to examine and understand the interactions between gender relevant welfare policy and gender outcomes in Germany using a gender ideal-type model for comparative analysis. The gender model continuum will be used in order to analyze outcomes for German women, and outcomes will either confirm or disprove the gender model categorization of Germany. Outcomes for women will be analyzed in order to explain how the gender model continuum corresponds to the German case study. The increase in women's labor force participation rates has expanded women's opportunities but also created new challenges for women to balance the demands of employment and domestic work and care giving.

The correspondence of welfare policies relevant to gender with gender outcomes may reveal the ways in which social policy maintains or equalizes the traditional division of labor between the sexes. Because welfare policy creates different interactions between state, market, and family, structural outcomes for women are an important measure with which to gauge welfare policy effects upon gender. It is assumed by many studies in mainstream welfare analysis that "the welfare state safeguards individuals against the

risks caused by industrialization, the expansion of markets and the weakening of traditional community networks” (Sainsbury 1994: 63). If this is true, a combination of welfare policies may be associated with higher rates of female labor force participation, lower female employment rates, lower female poverty rates, and greater pay parity between men and women.

Before analyzing gender outcomes for women in Germany and determining whether or not the assigned gender model is reflected in my specified gender outcomes for German women, the variation in outcomes between east and west German women should be explained. The legacy of different state and market arrangements between East and West Germany up until unification in 1990 continues to influence differences in outcomes between East and West German women today. These differences are accounted for in the German case study and it is assumed that variations in outcomes are likely between east and west women. East Germany’s state socialist welfare policy still retains some explanatory control over outcomes for women despite German unification. Historically, West Germany linked welfare entitlements to marriage while East Germany linked welfare to mandatory full-time employment (Giddings, Dingeldey, & Ulbricht 2004). The West German welfare system afforded women stay-at-home motherhood through generous social benefits targeted to the household/family level and based women’s claims (entitlements) for social provision on motherhood rather than through work in the labor market, need, or citizenship (Daly 2000). In contrast, the social paternalism of East Germany confined women’s dependence on the state rather than marriage as in the case of West Germany. Both systems assumed women to be the primary caretaker of the household; however, West Germany gradually expanded women’s welfare benefits and bases of entitlements away from strictly marriage towards employment, while East Germany enacted vast policy measures reducing the “double burden” of working women and mothers to combine career and care work (Young 1999). “In short, the ideological and social structural arrangements of state socialism produced a markedly different relation between the state, men, and

women than commonly found, for instance, in classic liberal parliamentary systems or in various kinds of welfare states (Gal and Kligman 2000: 5).

After unification, East German women met the ranks of West German women's substandard position coupled with the conditions of economic recession. The less extensive West German family and labor laws replaced East German laws while women lost their right to gainful employment that the GDR once guaranteed women (Young 1999). The structural changes of the labor market combined with different social/welfare arrangements and gender arrangements produced important differences in outcomes for both East and West German women since unification, and any policy study should account for these discrepancies between welfare arrangements and outcomes. "There is still a difference of around 20 percent between the employment rates of East and West German women and even higher differences of around 32 percent have been recorded for working mothers" (Beck, Wagener, and Grix 2005).

In the years following unification, East German women's labor force participation rates slipped as the East German welfare system collapsed and women's care options were eliminated while West German women's employment rates rose. East German women's labor force participation declined from 90 percent in 1989 to 73 percent by 2002, while West German women's labor force participation increased to 64 percent by 2002 (Trappe & Sorensen 2006). East German women's enduring rates of labor force participation should suggest that some of the legacies of state socialism that shaped gender relations still persist under the West German system and this difference is relevant to feminist research on the welfare state.

Table 1 shows female labor force participation rates in Germany increasing over the years 2000, 2005, and 2007. Because a maternal and parental leave policy in Germany enables women to stay at home, lower female labor force participation rates are expected to be observed. A male breadwinner policy model is evident in terms of female labor force participation in Germany: 63 percent of German women

participate in the labor market and this statistic jumped 7 points between 2000 and 2007, a significant increase that may be attributed to the widening of social welfare supports for women in the last two decades. In addition, despite impressive gains for women in the labor market, women are overrepresented in part-time work in all OECD countries (Federal Ministry for Family Affairs; 2004). Many women “choose” to meet the demands of employment and care work by taking part-time work as opposed to full-time, and Germany is not absent from this growing trend in women’s employment status. Table 1 shows that nearly 40 percent of working women in Germany worked part-time in 2005 and 2007. Birth rates were included to examine the relationship between social policy and gender outcomes. Research has shown that countries with high employment rates tend to have higher fertility rates. The Total Fertility Rate represents the average number of children that would be born to a woman during her lifetime based on current birth rates through her lifetime combined into a single year; the replacement rate represents the number of children it would take for a woman to replace herself in order to maintain population levels. The replacement rate in developed countries is about 2.1 (OECD 2009). The German fertility rate is one of the lowest in the world: in 2000 the fertility rate stood at 1.33 and increased minimally to 1.38 in 2006. Low birth rates in Germany may be attributed to Germany’s legacy of policies supporting stay-at-home motherhood that allows women to leave the labor market for up to three years per child.

Unemployment rates are another variable that can be used to measure the quality of gender relations. Because Germany has been characterized as a male breadwinner model in the policy analysis portion of the chapter, we can expect to find relatively higher unemployment rates for women. The German welfare state’s generous maternal and parental leave may account for higher female unemployment rates because the state affords women the option to leave the labor market during early childrearing years. Table 1 shows unemployment rates for women in Germany in the years 2000, 2005, and 2007. There is slight variation observed in unemployment rate percentages for the years: 6.7 percent of women were unemployed in 2000, jumping to 10 percent in 2005 and lowering slightly to 8.3 percent in 2007. Yet

unemployment rates were slightly higher for men in the same years: 7.5 percent of men were unemployed in 2000, to 11.5 in 2005, and decreasing to 8.2 in 2007. The lack of a gender gap in unemployment suggest that unemployment rates in Germany mirror the economic cycle and other conditions and are not reliable in the current decade. Variation in unemployment rates between east and west German continue to persist German unification. Unemployment rates for women in east Germany in 2004 stood at 19.5 percent while unemployment rates of west German women stood at 10.9 percent (Trappe & Sorensen 2006). This most likely can be attributed to slow economic recovery and growth and modernization in the East (Trappe & Sorensen 2006: 648).

Wage discrimination continues to affect both east and west German women but at different rates. A key explanation of the gender wage gap is the concentration of women into low-paying employment and declines in employment rates (Jurajda 2005). Wage gaps for female workers in the west in 1997 stood at 72.1 percent to that of male workers while female workers in the east received 77.1 percent of pay to that of male workers (Matheja-Theaker 2003). By 2000, German working women averaged 26 percent less than men and the gender gap figure decreased to 24 percent less for women than men by 2006 (Destatis 2006).

Wage differences tend to reflect the structuring of the labor market along gender lines: far fewer women fill middle and upper management positions in business and the majority of women tend to find careers in sectors with lower wages (Matheja-Theaker 2003). Career breaks, lack of seniority, and part-time work also contribute to women's wage discrimination as women who choose to have a family or become unemployed cannot accumulate as many years of continuous employment (Matheja-Theaker 2003). Another factor enabling women's wage discrimination is the notion that still persists in industry that men are breadwinners and "providers" who are entitled to higher pay despite the legal regulations for equal treatment (Matheja-Theaker 2003). Yet another factor aiding the wage gap is the West German welfare

state's generous social services for mothers that encourages women to abstain from the labor market to attain a measure of independence from the family (Matheja-Theaker 2003). Lower earnings also may limit women's access to work-related benefits including pension. The German welfare state seems to contribute to the gender wage gap in terms of all the selected gender-relevant policy variables including bases of entitlement, maternal and parental leave, pension and the lack of early public childcare facilities.

### **Conclusion**

The correspondence of welfare policies relevant to gender with gender outcomes has revealed some of the ways social policy in Germany maintains or equalizes the traditional division of labor between the sexes and gender relations more generally. The German welfare system as a whole can be characterized as a male breadwinner model, despite the modifications, both because women's basis of entitlement to welfare rely predominantly on motherhood and/or entitlements through work and in terms of observed gender outcomes. The traditional division of labor between the sexes is maintained through a male breadwinner model of welfare policy by and large via the maternal and parental leave schemes and the lack of publicly funded childcare. Germany's maternal and parental leave programs, although helping to lessen the individual's dependence on the labor market while at the same time compensating and supporting unpaid care work, nevertheless bars individuals from gaining social rights while maintaining labor market status. This research has attempted to understand how welfare policy constitutes gender interests, that is how policymaking shapes and structures women's incentives to work for pay and bear children. Women in Germany must suspend work in order to receive paternal benefits, and while care work is supported by the state, the German state largely does little to aid the compatibility of care work with employment. The German welfare system thus places a disincentive to work during the child rearing years and incentivizes labor force participation in terms of pension entitlements, which are incompatibly based on employment contribution periods. Gender relevant outcomes for women including employment, unemployment, and wage differentials also reflect a male breadwinner gender policy model. These variations in the observed

German gender policy similarly lead to variations in gender inequality via the observed outcomes for women and seem to correspond to outcomes observed under a male breadwinner system. As a conservative-corporatist welfare regime, Germany typically upholds the traditional family and thus exhibits a policy logic closer to the male-breadwinner gender model as opposed to the dual-earner model.

**Table 1**

**Table 1: Female and male employment and unemployment rates in Germany**

		Percent		
		2000	2005	2007
<b>Employment</b>	Women	58	60	63
	Men	73	71	75
<b>Unemployment</b>	Women	6.7	10	8.3
	Men	7.5	11.5	8.2
<b>Part-Time</b>	Women	—	39.4	39.2
	Men	—	7.4	7.9

*Source: OECD 2000, 2005, 2007*

*Part time: OECD Social Indicators 2006, 2009*

## **CHAPTER FIVE: WORK AND NEEDS-BASED GENDER POLICY IN THE UK**

Feminist adoption of the comparative perspective has shown the variation of the male breadwinner model across countries and over time. This chapter examines the impact of the male breadwinner model upon gender relations in the UK by using gender-relevant dimensions of policy analysis frequently neglected in traditional welfare state analysis. The basic argument premises that the relationship between state policies that intervene to support different types of individual and family arrangements affects the stratification of outcomes for women. In this chapter I assess each policy dimension in terms of its correspondence to the dual gender model continuum borrowed from both Sainsbury's (1996) contrasting ideal-type model and Pascall and Lewis' (2004) gender equality model. By analyzing the UK's gender-relevant policy, my analysis measures the extent to which the UK welfare system conforms or deviates from the dual gender model framework I have selected. The analysis of the UK's gender outcomes will additionally serve to support or disprove my categorization of each case to one of the two gender models.

The UK is a liberal capitalist welfare state: the market is favored over state intervention and the primary objective of social policy is poverty alleviation (Daly and Rake 2003: 142). The state is allowed only a limited degree of regulation and a mix of public, private, and voluntary sectors in welfare service provision is favored. According to Esping-Andersen's welfare regime typologies, the UK is a liberal welfare regime typified by policies that limit state intervention in the market, thus offering income and/or means-tested assistance, modest benefits with strict entitlements rules that produce an "equality of poverty" among recipients (Esping-Andersen 1990: 27). Like other liberal regimes, entitlement to benefits in the UK is typically either worker-based or needs-based and cash transfers and benefits are favored over the provision of services.

The UK differs from the policy logic of liberal regimes through the ideological mixing of both means-tested benefits for the poor and the principle of universal provision most evident in its National Insurance and health care systems (Daly and Rake 2003). Modest redistribution is the objective with protection against employment-related risks. With the exception of health care and insurance, tax subsidies and benefits are favored over the direct provision of services by the government (Daly and Rake 2003). The UK welfare state's primary accomplishment has been the national insurance scheme that provides pensions, unemployment, disability and sickness benefits to the entire population (Sainsbury 1999). A minimum safety net is available to those who do not succeed in the labor market comprised of means-tested benefits from the state. Entitlement bases to benefits typically come from work-based contributions, while needs-based entitlement comprise access to poverty assistance and care-based access is limited (Daly and Rake 2003).

UK women face fewer barriers to employment than women in conservative Christian welfare states like Germany due to a noninterventionist stance between the family, state and market, yet the state offers little assistance in aiding women to combine paid work with care work (Daly and Rake 2003: 144). The welfare system can be characterized as a moderate male breadwinner model that minimally supports women's employment, maintains gender inequality through nonintervention and work-related benefits and lacks policy to balance paid and unpaid work in order to prevent poverty assistance and dependency on the family among women. Women in the UK are therefore more likely to balance paid and unpaid work on their own, submitting to poverty assistance or part-time work. Solo mothers are the losers in liberal welfare regimes who often rely on means-tested poverty assistance to obtain entitlement to benefits on the basis of care (O'Connor et al. 1999).

As a liberal welfare regime, the UK typically upholds traditional gender roles through a policy of neutrality that favors the market above state intervention and thus exhibits a policy logic closer to the

male-breadwinner model as opposed to the dual-earner gender model. Liberal welfare states use a policy of nonintervention that in some respects supports the traditional family while in other respects allows women greater access to the labor market, yet with varying levels of inequalities in employment levels, pay, job segregation and full-time versus part-time work (O'Connor et al. 1999). The coherence of gender relevant welfare policy in the UK is mixed. The wide availability of part-time work affords women the opportunity to join the labor market at the same time part-time work in the UK involves a series of penalties in terms of pay, pension, and maternity leave (Daly and Rake 2003). A key question the research seeks to answer asks how welfare policy constitutes gender interests, that is, how policymaking shapes and structures women's incentives to work for pay and bear children. A gender model continuum will measure policy variation in the UK and clarify the ways in which the UK welfare state constitutes gender interests through policy.

### **Basis of Entitlement**

The UK welfare system can be characterized as a moderate male breadwinner model in combination with a liberal welfare policy framework that has the effect of separating gender roles through work-based entitlements that produce different types of gender inequalities via the market (Sainsbury 1999; Meyer and Pfau-Effinger 2006). Although women may collect benefits through employment independently, many UK women have access to pension entitlements through marriage rather than independently through work contributions to national insurance due to inequalities in the labor market. Entitlement bases to maternity and paternal leave are work-based, while pensions can be claimed through marriage, work, as well as care, at the same time adequate publicly provided child care in the UK does not exist. Entitlements based on need are prevalent in the UK: a larger proportion of women are assistance beneficiaries because they have poorer access to work-related benefits. "As a poverty-alleviating welfare state, women form the majority of 'clients' or beneficiaries of British cash transfers and services" (Daly and Rake 2003: 143).

The UK welfare system favors individual entitlements over family entitlements; however, lasting

inequalities produced by a male breadwinner framework persist. As compared to other liberal welfare regimes, the UK offers more care-related benefits but the benefits are usually means-tested and only provide a minimum standard of living for the beneficiary (O'Connor et al. 1999). The option to be a full-time carer is thus not supported adequately by UK social policy and solo mothers are particularly disadvantaged under the system.

Entitlements based on the principle of need are an important basis to social rights for UK women. However, need-based entitlements in the UK bring about what can be called the “unemployment” trap and the poverty trap: only those earning under a certain minimum or working part-time rather than full-time, are eligible for assistance (Sainsbury 1996). This condition discourages full-time employment for poor women and affects the economic activity rate of lone mothers. “A poverty trap exists when recipients of means-tested benefits find that an increase in earnings is offset by simultaneous reductions in benefits and increased outlays due to income tax and national insurance contributions” (Sainsbury 1996: 81). Those working full-time with the required earnings minimum qualify for national insurance benefits supplement their income and eliminate their chances of falling into poverty while those making under the earnings minimum and/or working part-time while receiving means-tested benefits and assistance fare much worse under the system.

State provision in the UK fails to create a bridge between care work and employment for women largely because work is the predominant basis of entitlement to the social rights that enable women to recover the disadvantages encountered in the labor market and within the family. Many women in part-time work protect themselves from poverty through a male income or must turn to poverty assistance. The UK is thus in need of multiple entitlement bases for women including care and citizenship while its work-based pension and maternity leave schemes should incorporate part-time work as a basis for full entitlements, owing to the fact that part-time work is a major working arrangement in the lives of many UK women.

## **Maternal and Parental Leave**

Moderate gender bias still exists in the UK in terms of maternity and parental leave. Women are entitled to an extensive 52 week maternity leave based on contributory qualifications and may still receive maternity benefits while maintaining employment. Women's attachment to paid employment is strengthened under the UK maternal leave scheme because entitlement is employment-based. However, welfare policy favors women as the ascribed primary caretakers, benefits are targeted to mothers rather than fathers, and work-related qualifications are required.

The UK welfare system offers 26 weeks of employment-dependent ordinary maternity leave and an additional 26 weeks of maternity leave; 39 of the weeks are paid as Statutory Maternity Pay (SMP) (Forbes 2009: 16). Eligibility requirements for paid leave include that the woman be employed 15 weeks prior to delivery, has stayed with the same employer for 26 weeks, and earns above the limit for national insurance contributions (Forbes 2006: 16). Maternity pay for the 39 weeks stands at 90% of original earnings for the first six weeks and then the prevailing flat rate thereafter (Forbes 2009: 16). If the mother does not fit the requirements for SMP but has worked for a minimum of 26 of the last 66 weeks, she can claim Maternity Allowance (MA) paid at 90% of earnings or the flat rate (Forbes 2009: 16). Fathers are entitled to two weeks paid parental leave and up to 13 weeks unpaid leave under the same requirements as women and are entitled to Statutory Paternity Pay (SPP) if they make above the lower earnings limit for national insurance contributions (Forbes 2009: 16). The unpaid paternal leave is taken in blocks of up to four weeks until the child is five (Forbes 2009). There is also a carer's leave of 13 weeks per parent for each child, taken in blocks of 1 week, for a maximum of 4 weeks per year, until the child is 5 (Forbes 2009). Maternity benefits in the UK do not include an equivalent provision for fathers, which reinforces traditional patterns of care and gender roles and identities and thus affects women's equal participation in the labor force.

The male breadwinner bias evident in the UK's maternity leave eligibility is based on conditions of employment and earnings which may exclude many women or leave them eligible only for lesser benefits such as Maternity Allowance. The UK welfare state provides a full 39 weeks of pay for maternal leave but offers an inadequate paternity leave scheme for 13 weeks over the first five years of a child's life (Bussemaker and van Kersbergen 1999). This policy arrangement results in the woman taking leave both because of the sexual division of labor and pay inequities between men and women. Support for women in combining labor market participation with care work is adequate in the UK provided claimants meet eligibility requirements including employment conditions and an earnings minimum. While the UK scheme allows mothers to work while receiving paid and unpaid maternity and paternal leave, no such benefits can be claimed through care work, as in the case of Germany.

### **Pension**

The UK pension system can be characterized as a moderate breadwinner model because it recognizes pension right entitlements for multiple social roles including worker, care worker, and wife. However, the multiple entitlement bases to pension rights bring their own advantages and disadvantages to women's life opportunities. Unlike German state pensions that are acquired solely through employment contributions, the UK grants pension rights through care work contributions and marriage, affording women with different life circumstances access to pensions in their own right (Meyer and Pfau-Effinger 2006).

Between the years 1945 to 1975 the UK pension system under National Insurance (NI) was characterized as strong breadwinner model because the system treated women as dependents. Women received entitlements to pensions through the husband's insurance contributions, they were not required to pay insurance contributions, and they could not claim entitlement rights through employment (Meyer and Pfau-Effinger 2006). Women were entitled to 60 percent of the husband's pension upon his retirement at

age 65. The only way to qualify for pension insurance independently was through the ‘Married Woman’s Option’, which required women to prove an employment career for half their married years (Meyer and Pfau-Effinger 2006: 91). Reforms in 1975 changed the gender model toward a moderate breadwinner model because the new system allowed for independent pension entitlement for women through multiple bases including paid work, care, and marriage (Meyer and Pfau-Effinger 2006: 95). The Social Security Act of 1975 phased out the ‘Married Woman’s Option’ ending the formal discrimination of married women in the national insurance scheme by allowing all employed women above the ‘lower earnings limit’ to gain pension entitlements independently. The abolition of the married woman’s option was one of the most significant reforms establishing the equal treatment of sexes in social provision because it equalized access to benefits and improved eligibility for women. However, independent entitlement to pension relies on employment and insurance contribution periods based on an earnings threshold, which excludes many low-paid and part-time workers, many of whom tend to be women. Care work was also recognized and included as a basis for entitlement on equal footing with paid work through the ‘Home Responsibility Protection’ (HRP), which reduced the amount of qualifying years for the Basic State Pension to 16 years care work per child (provided the carer give up employment) and paid contributions are required for at least half of the qualifying years (Meyers and Pfau-Effinger 2006; Pensions Commission 2004).

Reforms to National Insurance in 1997 improved public pensions significantly. The first tier of National Insurance is contribution-based and dependent on the number of years contributions are paid at a flat-rate: to qualify for a full Basic Pension women must typically contribute 39 years (Sainsbury 1996). The additional pension known as the State Second Pension (SSP) is a voluntary scheme introduced in 2002 that provides extra pension provision above and beyond the Basic Pension and claimants qualify based on their earnings at or above the Lower Earnings Threshold (LET) (Pensions Commission 2004). The SSP is more generous toward low income people and better accommodates care work pension qualifications and

allows surviving dependents including divorcees to qualify for the additional pension as well (Meyers and Pfau-Effinger 2006: 95).

The UK pension system may deny women equal pension rights to men in many respects. Thanks to the reforms of 1975 and onwards, UK women can accumulate pensions on their own through paid work and care and no longer must rely on marriage as the only feasible grounds for pension entitlements. Yet if women meet only partial pension contributions through employment or care they receive only partial pension benefits in old age. Care giving pension qualifications may also create conditions for dependency for women because maternity leave in the UK is employment-based; thus a full-time care giver may not rely on maternity leave compensation. Therefore, women who gain entitlement to pension rights through care work may in turn forfeit employment-dependent maternity leave benefits through this double bind in entitlement qualifications. Care giving pension qualifications may also be inadequate and create conditions for dependency and poverty. The UK's employment-based maternity leave thus disqualifies care givers from receiving benefits and women must turn to the family or the private market for care giving.

For a large majority of the time, marriage served as UK women's basis for entitlement to pension insurance: in 1980, nearly 70 percent of women based their pension claims on their husband's insurance (Sainsbury 1996: 131). Women with employment-based pension contributions tend to have lower average benefits due to labor market disadvantages; even when women make full contributions to qualify for full National Insurance it may still leave them at the poverty line and in need of Income Support, the UK's means-tested social assistance (Sainsbury 1996: 124). Basic Pension's lower income limit also poses a major obstacle for women because women who are below the earnings limit are not obligated to pay contributions and are therefore not eligible for pension insurance and must rely on means-tested and poverty-reinforcing assistance.

## **Childcare**

A large body of empirical research in economic theory associates improvements in women's childcare options with increases in women's labor force participation (Nyberg 2004). The gender equalizing affects of childcare cannot be understated: not only does affordable public childcare convert care into paid work, it sets limits to care responsibility for individuals at the same time it compensates women's unpaid care work and allows women to remain employed in the labor market. The UK welfare state has little state sponsored childcare services and relies mostly on privatized care services, owing to the dominance of the male breadwinner model despite EU directives. The UK conforms to the liberal welfare state and male breadwinner model typologies, especially in terms of child care: private responsibility for child care is imposed and leave provision is adequate but involves widespread exclusions due to work-based entitlement claims. This approach is part of the liberal welfare state arrangement that views the proper sphere of the state as enabling the market to function in place of direct state intervention (Esping-Andersen 1990).

The UK's child benefit reform enhanced the care principle to entitlement in the late 1970s by replacing the family allowance and child tax deductions usually claimed by the father in favor of a relatively universal child benefit covering dependents until the age of 16 (Sainsbury 1996). Child care services are provided only to the poorest families and children at risk of physical abuse or neglect that guarantees a minimum level of quality child care. Child poverty assistance has risen in recent years in the UK with 317,000 low and middle class working families receiving financial support for child care in 2004 (OECD Babies and Bosses 2005). The majority of women and families in the UK either rely on paid maternal and parental leave programs and financial services to poor families rather than public childcare in order to balance the demands of career and home. The lack of adequate public childcare from birth until age 6 constitutes a gender bias for UK women, who must rely on gendered maternal and parental leave schemes that inadequately support women's paid employment.

## **Outcomes**

Table 2 shows female employment rates in the UK stabilizing at above 65 percent over the years 2000, 2005, and 2007. The UK's employment-based welfare system women to participate in the labor market, therefore higher female employment rates are expected to be observed. Female employment rates stood relatively stable for UK women in the seven year period observed: in 2007, 66 percent of women were employed relative to 78 percent of men. A 12 percent employment gap for women shows a disparity in the employment potential for women. Women's reduced presence in the labor market as compared to men contributes to persistent gender divisions within the country. Therefore, although significantly higher in the UK as compared to other OECD countries, female employment rates qualify the UK welfare system as a male breadwinner model typology. Although women's access to the labor market is open in the UK, conditions for engagement may be inadequate for many women. The statistics may also indicate that the widening of social welfare support in National Insurance in the UK under New Labour since 1997 has not increased female employment rates between 2000 to 2007.

In order to understand women's employment behavior, employment rates must be placed in perspective to account for other explanatory factors affecting such rates including part-time work and work interruptions such as maternity and parental leave (Daly and Rake 2003). "While the wide availability of part-time work affords mothers and other women the opportunity to be in the labor market, this imposes a series of penalties in terms of pay, career prospects and working conditions, each of which has considerable consequences for the shaping of the life course" (Daly and Rake 2003: 143). Despite impressive gains for women in the labor market generally, women are overrepresented in part-time work in all OECD countries (Federal Ministry for Family Affairs 2004). Many women "choose" to meet the demands of employment and care work by taking part-time work as opposed to full-time, and the UK is not absent from this growing trend in women's employment status: nearly 40 percent of working women were employed only part-time in 2005 and 2007. Birth rates are included in order to examine the relationship

between social policy and gender outcomes. A number of gender-relevant policies affect fertility rates, including maternal and parental leave and childcare, while higher female employment rates are associated with higher fertility rates (Brewer et al. 2007; Forbes 2006). Research has shown that countries with high employment rates tend to have higher fertility rates and gender-egalitarian policies that support female employment tend to promote these outcomes (Huber & Stephens 2001). The Total Fertility Rate represents the average number of children that would be born to a woman during her lifetime based on current birth rates through her lifetime combined into a single year; the replacement rate represents the number of children it would take for a woman to replace herself in order to maintain population levels. The replacement rate in developed countries is about 2.1 (OECD 2009). The UK fertility rate, similar to the female employment rate, is relatively high among OECD countries: in 2000 the fertility rate stood at 1.64 and increased moderately to 1.79 in 2006. Higher birth rates in the UK may be attributable to the UK's national insurance scheme that allows many women to work and receive welfare benefits through work and earnings-based entitlements individually.

Unemployment rates are another variable that can be used to measure the extent of gender equality. It should be noted that unemployment rates measure only the percentage of those in the labor force who are unemployed but a percentage of women never enter the labor force if they are full-time care givers. Because the UK has been characterized as a male breadwinner model in the policy analysis portion of the chapter, we can expect to find relatively higher unemployment rates for women. We can expect higher unemployment rates in the UK due to the state's work-based maternal and parental leave entitlements because the state affords women the option to leave the labor market during early childrearing years. Table 2 shows unemployment rates for women in the UK for the years 2000, 2005, and 2007. There is slight variation observed in unemployment rate percentages for the years: 4.8 percent of women were unemployed in 2000, lowering to 4.3 percent in 2005 and jumping to 5 percent in 2007. Yet unemployment rates were slightly higher for men in the same years: 5.9 percent of men were unemployed

in 2000, to 5.2 in 2005, and decreasing to 5.6 in 2007. The lack of a gender gap in unemployment suggest that unemployment rates in UK mirror the economic cycle and other conditions and are not reliable in the current decade. However, because male employment rates are higher than female rates in the UK, lower unemployment rates for women must be accounted for proportionally to lower female employment rates.

Wage differentials between women and men are an important indicator of gender inequality, giving us a picture of the advantages and disadvantages associated with women's employment relative to men's. It is a key explanatory variable measuring the extent to which women are concentrated in low-paying employment and may contribute to declines in employment rates and also helps to determine the financial well-being of people in different types of family situations, especially for lone mothers (Jurajda 2005).

Wage differences tend to reflect the structuring of the labor market along gender lines: far fewer women fill middle and upper management positions in business and the majority of women tend to find careers in sectors with lower wages (Matheja-Theaker 2003). Career breaks, lack of seniority, and part-time work also contribute to women's wage discrimination as women who choose to have a family or become unemployed cannot accumulate as many years of continuous employment (Matheja-Theaker 2003).

Another factor enabling women's wage discrimination is the notion that still persists in industry that men are breadwinners and "providers" who are entitled to higher pay despite the legal regulations for equal treatment (Matheja-Theaker 2003). Lower earnings also may limit women's access to work-related benefits including pension. In 2007, UK working women averaged 21.9 percentage points less than men and the gender gap figure increased slightly to 22.6 percentage points less for women than men in 2009 (Women and Work Commission 2009). The pay gap for full-time workers in 2007 was 12.5 percentage points in 2007 and increased to 12.9 by 2009. Wage gaps in part-time were the largest with a 39.9 percentage point difference for women workers in 2009. This difference is significant because 38.6 percent of women in 2007 worked part-time while only 9.9 percent of men worked part time in the same year (Women and Work Commission 2009). The UK welfare state seems to contribute to the gender wage

gap in terms of all the selected gender-relevant policy variables including bases of entitlement, maternal and parental leave, pension and the lack of early public childcare facilities.

## **Conclusion**

The correspondence of welfare policies relevant to gender with gender outcomes has revealed some of the ways social policy in UK maintains or equalizes the traditional division of labor between the sexes and gender relations more generally. The UK welfare system as a whole can be characterized as a male breadwinner model, despite the modifications, both because women's basis of entitlement to welfare rely predominantly on entitlements through work and need and in terms of observed gender outcomes. Despite the improvements in policy, the traditional division of labor between the sexes is maintained through a male breadwinner model of welfare policy by and large via work-based maternal leave and pension schemes that maintain women's disadvantages in the labor market and through the lack of publicly funded childcare. The principle of care is rewarded in terms of the pension scheme for care work and a generous child benefit program that covers every dependent claimed until the age of 16. These variations in the observed UK gender policy similarly lead to variations in gender inequality via the observed outcomes for women and seem to correspond to outcomes observed under a male breadwinner system. Gender relevant outcomes for women including employment, unemployment, part-time employment, birth rates, and wage differentials also reflect a minimal male breadwinner gender policy model. Individual work-based benefits may contribute to high female employment rates in the UK at the same time part-time employment rates for women are equally as high. A significant wage gap of nearly 23 percentage points signifies that despite policy reforms and antidiscrimination policies still have not altered the significant setbacks women face in terms of career breaks, job segregation, and prevalence of inadequate part-time work.

While the UK system aids women in gaining social rights while maintaining labor market status, its maternal and parental leave programs maintain women's dependence and lesser status in the labor market and policy does little to compensate and support unpaid care work. State provision and benefits in the UK fails to create a bridge between care work and employment for women largely because work is the predominant basis of entitlement to social rights that may confine women due to the inequalities of the labor market. Considering the substantial proportion of women in part-time work, welfare policy's requirements and conditions are curious and highly unequal. Reducing the rate of part-time employment and improving the situation and conditions of those working part-time involuntarily might enhance gender equality in the UK, but such processes may involve more direct state intervention in the labor market. One alternative to this could be to expand the entitlement bases to benefits in the UK. The UK would do better to incorporate multiple entitlement bases for women including care and citizenship while its work-based pension and maternity leave schemes should incorporate part-time work as a basis for full entitlements in order to compensate for the inequalities of the market and toward the reconciliation of paid work with care work.

**Table 2**

**Table 2: Female and male employment and unemployment rates in the UK**

		Percent		
		2000	2005	2007
<b>Employment</b>	Women	66	67	66
	Men	79	79	78
<b>Unemployment</b>	Women	4.8	4.3	5
	Men	5.9	5.2	5.6
<b>Part-Time</b>	Women	—	39.3	38.6
	Men	—	10.0	9.9

*Source: OECD 2000, 2005, 2007*

*Part-time: OECD Social Indicators 2006, 2009*

[http://oberon.sourceoecd.org/pdf/society\\_glance/08.pdf](http://oberon.sourceoecd.org/pdf/society_glance/08.pdf)

## **CHAPTER SIX: CITIZENSHIP-BASED GENDER POLICY IN SWEDEN**

Feminist adoption of the comparative perspective has shown the variation of the male breadwinner model across countries and over time. This chapter examines the impact of the male breadwinner model upon gender relations in Sweden by using gender-relevant dimensions of policy analysis frequently neglected in traditional welfare state analysis. The basic argument premises that the relationship between state policies that intervene to support different types of individual and family arrangements affects the stratification of outcomes for women. In this chapter I assess each policy dimension in terms of its correspondence to the dual gender model continuum borrowed from both Sainsbury's (1996) contrasting ideal-type model and Pascall and Lewis' (2004) gender equality model. I examine the relationship of gender-relevant policy with gender outcomes including female employment and unemployment rates, birth rates, and wage differentials. By analyzing gender-relevant policy in Sweden, my analysis measures the extent to which Sweden's welfare system conforms or deviates from the dual gender model framework I have selected. The analysis of Sweden's gender outcomes will additionally serve to support or disprove my categorization of each case to one of the two gender models.

Sweden is a social democratic welfare state: state intervention modifies the market with a high degree of labor market regulation, full employment is guaranteed and universal social rights are catered to the middle class (Esping-Andersen 1990). The state dominates in the labor market, making many goods and services which would be otherwise private in other countries, public and universal so as to achieve a greater level of social equality (Daly and Rake 2003: 151). The Swedish welfare system combines universal entitlements with additional high earnings-graduated benefits to bring about “a universalism of ‘middle-class standards’” (Esping-Andersen 1990). Employment and citizenship are the primary means to entitlement to benefits and services and a high degree of individualization strips claimants of their family

commitments, allowing the state to intervene more directly in the provision of welfare resources (Daly and Rake 2003: 151).

The Swedish government began to support a dual-earner dual-carer model through policy changes implemented during the 1960s and the 1970s. Policy facilitating gender equality between the sexes emphasized increased employment opportunities for women and new care giving options for men in order to change the position of both men and women (Nyberg 2004). Sweden responded to the structural pressures of late capitalism and the destabilization of the male breadwinner model by increasing welfare rights and services for all citizens. The policy logic of social democracies like Sweden are characterized around four modifications: policy is fashioned to enhance job opportunities of disadvantaged groups in the labor market; public services are widespread and presented as a social right rather than as commodities purchased in the market; social rights are citizenship-based rather than work-based to limit the influence of market inequalities and resulting social stratification; and funding of benefits and services is based in general revenue rather than through individual contributions of the insured (Sainsbury 1999: 259-60). Sweden offers both extensive social services and income transfer programs through large public expenditures and high taxes that allow the state to achieve a considerable amount of social integration (Daly and Rake 2003).

The Swedish welfare system, through a policy of gender equality and egalitarianism, benefits women in a variety of ways. Sweden actively promotes full employment of its population by playing a major part in both public and private job creation, and the state takes an active role in social reproduction services so as to incorporate women into the labor market (Mosesdottir 2001). This has resulted in one of the highest female labor force participation rates in the world and one of the lowest gender wage gaps. Citizens are protected from poverty through minimum income protection and a compressed wage structure across occupational sectors through a centralized bargaining system (Mosesdottir 2001). Women are further

protected by wide-ranging welfare policies including a supportive parental leave and allowances, guaranteed public childcare and a variety of child benefits, an individual taxation policy to eliminate family dependencies and supplements in taxation, unemployment benefits, universal health care, and policies enabling women and men's equal access to paid work (Sainsbury 1999).

Despite policy changes and directives promoting work-life balances for women, the Swedish welfare system sustains both high levels of gender segregation and part time work in the labor market. While cornerstone policy intended to alter the sexual division of labor, Swedish women still perform the majority of unpaid household labor and men often do not use their new rights to care-related benefits (Sainsbury 1999). A high degree of gender segregation in the labor market has created a female-dominated public sector and a male-dominated higher-paying private sector (Daly and Rake 2003). The wide availability of part-time work affords women the opportunity to join the labor market at the same time part-time work in Sweden involves a series of penalties in terms of pay and work-related benefit levels (Daly and Rake 2003). In terms of entitlement bases, citizenship-based claims to benefits equalize access between the sexes, while additional qualifying conditions under employment-based claims, including minimum work requirements and/or earnings requirements disadvantage women and create gender inequalities. The state is essentially involved in the reproduction of gender inequalities at the same time it promotes gender egalitarianism in opportunities and outcomes (Lewis and Astrom 1992). This is because the welfare state is both a system of social stratification even as it intervenes benefits and services to support an egalitarian state (Esping-Andersen 1990). The persisting disparities between men and women in the Swedish case may signify that although the dual-earner dual-carer model improves women's position in the labor market and in the family, it is not a cure all solution to gender inequality. Through an analysis of gender-relevant welfare policy, I will examine the ways gender is constructed in welfare state legislation and to what extent Sweden conforms to the dual-earner dual-carer gender model which social democratic welfare regimes have been shown to correspond to.

### **Basis of Entitlement**

As a social democratic welfare state regime, Sweden exhibits a policy logic closer to the dual-earner dual-carer model because women's bases to entitlements to welfare rely predominantly on citizenship and work. These entitlement bases underpin Sweden's policy of "middle class universalism" and allow women to remain in the labor force and at the same time qualify for care-related benefits in order to balance paid work and care work. Entitlements based on citizenship or residence have been shown to weaken the influence of the market and the family in women's lives and create a relative equality in access to benefits (Sainsbury 1999). Entitlements based on citizenship also extend entitlements to those outside of the labor market and not privilege paid work in the public sphere over unpaid work in the private sphere. Citizenship entitlements assist women's access to benefits because they do not differentiate entitlements based on social role or gender, providing universal access to social rights for both genders. Sweden's parental leave and pension schemes feature a base universal benefit through citizenship entitlements that act as a minimum standard to all citizens. In addition, both schemes offer a work-based earnings-related benefit to supplement the average worker qualifying for the benefits and encourage labor market participation. While work-based earnings-graduated benefits replace a worker's previous income, and are central means to incorporate men in care-related entitlements, work-based benefits have the effect of separating gender roles that produce different types of gender inequalities via both the market and state social provision.

The Swedish model links care-related and work-related benefits that allow women to combine work-based entitlements and care-based entitlements. Parents do not need to leave the labor market in order to receive care-based benefits, and work-based benefits may be combined with care-based benefits, to optimize women's and men's abilities to combine employment with care work (Sainsbury 1999). This compatibility between work and care "makes possible interchangeable periods of work and care for all earners" (Sainsbury 1999: 265). The Swedish welfare regime solves the question of care by recognizing

the value of both paid work and unpaid work by making both entitlement bases compatible. Individual entitlement, another key feature in social democracies, deemphasizes the family in the provision of benefits and services so that men and women have equal claim to care-related benefits.

Entitlements based on citizenship allow equal access to social benefits and services, while work-based entitlements create middle-class standards of living but bring about inequalities in outcome between men and women. This is especially so in terms of pension benefits. Work-based claims in Sweden pose a contradiction to women: at the same time work-based claims to benefits improve the economic condition of women, benefits also increase the disparities between the sexes. The work-based earnings-graduated pension scheme create disparities in women's and men's pension incomes because the scheme does not compensate for or protect women from labor market disadvantages that affect their abilities to ensure a full pension in old age. In terms of parental leave, benefits that replace a parent's loss of income give men a chance to take a share of parental leave.

### **Maternal and Parental Leave**

Little overt gender bias exists in Sweden's parental leave that supports the dual-earner dual-carer model by requiring both sexes participate in childcare leave. There is universal entitlement to parental leave based on citizenship. A flat rate is paid to unemployed or underemployed claimants and an income-replacement work-based benefit scheme covers employed claimants (Sainsbury 1999; Nyberg 2004). The Parental Insurance Act of 1974 converted maternity leave into solely paternal leave once Swedish policy established equal opportunities for women and men in care taking leave (Nyberg 2004). Under the system, women and men are entitled to 16 weeks paid parental leave: each are entitled to half of the parental leave days but can be transferred to one parent, while a "father's quota" of 60 days of parental leave is offered and cannot be transferred to the other parent (Nyberg 2004). Parents may take full-time leave up until the child is 18 months old, or until paid parental allowance has ended. Employed and non-

employed parents are covered under parental leave at 80 percent income replacement rate with an income ceiling for the first 390 days and at a flat-rate for the last 90 days (Nyberg 2004). In addition, the father or another individual (if the mother is a solo parent) is entitled to take 10 days of paid parental leave when the child is born in order to assist the mother or other members in the family (Nyberg 2004). Parental leave in Sweden is generous and flexible: paid leave can be used up until the child is 8, can be used full-time or part-time, and the duration of leave has expanded in recent years (Nyberg 2004). Earnings-related conditions allow both parents to take leave simultaneously and work partially on the same day.

Entitlement to earnings-related leave is employment-based and a claimant must work a minimum of 240 days before the birth of the child in order to qualify. Ineligible claimants are entitled to a lower rate of pay of 180 SEK/day (Nyberg 2004).

Sweden's parental leave scheme maintains some of the disadvantages women face in the labor market through qualifying conditions to parental allowance. Slight male breadwinner bias is evident in work-based eligibility requirements which may exclude many part-time female workers or leave them eligible only for lesser benefits. The arrangement in income replacements rates for women who qualify for work-related parental allowances creates a gender disparity in benefits because women generally earn less than fathers and typically take the longer duration of parental leave (Sainsbury 1999). Despite the gender neutral provisions in parental leave, the structure of work is organized around the typical male worker and women are still far more likely to take leave, thus sustaining sex segregation of the labor market while career breaks negatively impact women's job position and chances for maintaining positions of seniority (Sainsbury 1996). Support for women in combining labor market participation with care work is adequate in Sweden provided claimants meet eligibility requirements that include employment conditions and an earnings minimum. Earnings-related paternal allowances that replace a worker's income favors men who tend to make higher pay in private sector employment and additionally serve to compel men to take

parental leave because flat rate benefits discourage male workers who tend to make higher pay in private sector employment and so face greater income losses for taking leave.

Women's attachment to paid employment is strengthened through employment-based earnings-related parental leave entitlements. Sweden's scheme allows mothers to work while receiving paid and unpaid parental leave. A minimum flat rate benefit for parents who are unemployed or underemployed also allows full-time care givers the right to paid parental leave, regardless of employment and earnings, albeit at a lesser rate. Despite gender neutral provisions in parental leave fashioned to equalize imbalances in unpaid care work and enhance female labor force participation, fathers still use only 20 percent of the allotted parental leave (Duvander et al. 2005). This inability to significantly incorporate men into parental leave scheme reinforces traditional patterns of care, the sexual division of labor in the home, and gender inequalities of the labor market. However, from a comparative perspective, Swedish parental leave facilitates women's equal participation in the labor force and affords men the opportunity to take equal amounts of parental leave.

### **Pension**

The Swedish pension system can be characterized as a dual-earner dual-career gender model because the system is universal, with a minimum guaranteed pension based on citizenship and/or work entitlements. Gender inequality in pension income is rooted in benefit levels rather than access because Sweden offers universal access to pension benefits through citizenship. Significant inequalities in women and men's pension income persist: the average women's pension entitlement in Sweden is 68 percent to that of a man's (Bonnet & Geraci 2009).

Pension provision consists of two different systems: the older pension system regulated by the 1962 National Insurance Act for those born in 1937 or earlier and the new pension system regulated by reforms in 1998 for those born in 1954 and later (Vidlund 2009). Those born between 1938 through 1953 are

covered by a combination of the two systems. The reformed pension system of 1998 consists of an earnings-related pension and a guarantee pension to secure a basic minimum income. The earnings-related pension is a defined-contribution based pension for workers and features two parts: the income pension and the premium pension (Vidlund 2009). All Swedish residents of at least three years are entitled to the guarantee pension which is means-tested and funded by general tax revenue; higher earnings-related pensions reduce the amount of guarantee pension entitlements. Pension and housing supplements are available to those who do not qualify for the supplementary or earnings-related pension. The supplementary earnings-related pension under the old pension system will continue until the end of the transition period to the new system (Vidlund 2009). Pensions can be claimed via employment or citizenship, and amounts increase based on the level of income or the number of years of residence. To qualify for full pension benefits, 40 years of residence or 30 years of earnings is required. The earnings-related pension uses an income-replacement rate and is pay as you go while the premium pension is based on full funding and both are financed through employee and employer contributions (Vidlund 2009). Contributions for the earnings-related pension are paid for by a claimant's income for each year of work. Pension entitlements are then added together year by year and determined based on an income index (Vidlund 2009).

Sweden's pension system is universal with additional earnings-related benefits that feature different benefit levels based on income and the number of years of contribution. This invariably leads to a degree of inequality in benefits levels, while the guarantee pension grants equality in access to pensions for both sexes. On the one hand, Swedish women are shielded from unequal access to benefits through its guaranteed pension scheme, while on the other hand, women cannot escape the gender-related inequalities involved in employment-based pension contribution schemes (Sainsbury 1996). As numerous studies have shown, women tend to have lower average benefits under earnings-related pension insurance due to labor market disadvantages including career breaks and lower pay (Bonnet & Geraci 2009). Put

comparatively, the German pension system provides unequal access through employment-based pension rights, and while the UK offers multiple entitlement bases to pension, employment-based entitlements require full contribution requirements for a full pension; only Sweden offers equal, universal access to a basic pension. Alternative measures to reduce gender inequalities in pension incomes in Sweden include minimum pensions and pension calculation rules that account for career breaks and part-time work (Bonnet & Geraci 2009).

### **Childcare**

Childcare policy in Sweden conforms to the dual-earner dual-carer model because the state controls the majority of the provision, funding, and regulation of childcare. Public childcare is a universal social right and accessibility and quality are high, while prices remain affordable for most families (Nyberg 2004). Typically, children between the ages of 2 through 5 are enrolled in public childcare (Nyberg 2004). Work-based entitlements to childcare were officially replaced in 2001; the right to childcare for at least 15 hours a week was expanded to unemployed parents and those using parental leave with 4 to 5 year olds (Nyberg 2004). Public childcare is funded mainly through general tax revenues allocated to individual municipalities, with around 10 to 11 percent of the revenues coming from sliding scale income-related parental fees (Sainsbury 1996; Swedish National Agency for Education 2007). Access to childcare was work-based until 2001 and universal public childcare has strengthened over the last decade in Sweden (Nyberg 2002).

Childcare policy is a key element of the dual-earner dual-carer model. It interlinks with important social institutions including the labor market, the family, gender, and social policy. Childcare services are a great benefit to women: not only do collective services convert care into paid work, affordable public childcare allows women to remain in the labor market. Sweden is distinguished from other welfare states through the quality and range of publicly financed service production; in particular, women's equal right

to work and have children is advanced through its childcare services. By setting limits to care responsibility for individuals, public childcare compensates women's unpaid care work. The principle of individual entitlement underpinning childcare also gives solo mothers and fathers the opportunity to support themselves through wage work. Swedish public childcare plays an important factor in all women's ability to balance motherhood with employment. Universal entitlement to childcare in Sweden qualifies as a highly equalizing gender policy.

### **Outcomes**

Table 3 shows female employment rates in Sweden stabilizing at above 72 percent over the years 2000, 2005, and 2007. Because the Swedish welfare state intervenes in the labor force to promote equality of opportunity in employment, higher female employment rates are expected to be observed. As is evidenced, Sweden's active involvement in the labor market results in high employment rates for women. Female employment rates stood relatively stable for Swedish women in the seven year period observed: in 2007, 73 percent of women were employed relative to 76 percent of men. A 3 percent employment gap for women shows relative equality in employment rates between women and men. Active labor market policy directed to women protects those most vulnerable to labor market fluctuations, unemployment, economic restructuring, and low pay and promotes high labor market participation rates. The expansion of public services, a key feature in social democratic welfare states, and generous social services and benefits also improved women's access to jobs. However, labor force participation rates cannot measure the full quality of women's employment: job segregation upon gender lines and lower female earnings in Sweden is widespread. Nevertheless, Swedish welfare state's commitment to full female employment through a variety of policy measures has translated into one of the highest female employment rates in the world. As Table 3 shows, Sweden conforms to the dual-earner dual-carer gender model through high female employment rates and low gender disparity between male and female employment rates.

In order to understand women's employment behavior, employment rates must be placed in perspective to account for other explanatory factors affecting such rates including part-time work and work interruptions such as maternity and parental leave (Daly and Rake 2003). "While the wide availability of part-time work affords mothers and other women the opportunity to be in the labor market, this imposes a series of penalties in terms of pay, career prospects and working conditions, each of which has considerable consequences for the shaping of the life course" (Daly and Rake 2003: 143). Despite impressive gains for women in the labor market generally, women are overrepresented in part-time work in all OECD countries (Federal Ministry for Family Affairs 2004). Many women "choose" to meet the demands of employment and care work by taking part-time work as opposed to full-time, and Sweden is not absent from this growing trend in women's employment status: nearly 20 percent of working women were employed in part-time work in 2007 (OECD 2008). Birth rates were included in order to examine the relationship between gender policy and gender outcomes. A number of gender-relevant policies affect fertility rates, including maternal and parental leave, childcare and policies aiding the compatibility of employment and care work, while higher female employment rates are associated with higher fertility rates (Brewer et al. 2007; Forbes 2006). Research has shown that countries with high employment rates tend to have higher fertility rates and gender egalitarian policies that support female employment tend to promote these outcomes (Huber & Stephens 2001). The Total Fertility Rate represents the average number of children that would be born to a woman during her lifetime based on current birth rates through her lifetime combined into a single year; the replacement rate represents the number of children it would take for a woman to replace herself in order to maintain population levels. The replacement rate in developed countries is about 2.1 (OECD 2009). The Swedish fertility rate, similar to the female employment rate, is relatively high among OECD countries: in 2000 the fertility rate stood at 1.55 and increased moderately to 1.75 in 2006. Higher birth rates in the Sweden may be attributed to Sweden's complementary social democratic welfare model and dual-earner dual-carer model that allows virtually all

women universal individual entitlement to benefits and services that support the combining of motherhood and care work, resulting in higher fertility rates for women.

Unemployment rates are another variable that can be used to measure the extent of gender equality. It should be noted that unemployment rates measure only the percentage of those in the labor force who are unemployed but a percentage of women never enter the labor force if they are full-time care givers. Women's unemployment patterns are problematic for women because women interrupt their employment more than men and receive less pay relative to men; therefore, unemployment gaps between men and women can suggest larger gender inequalities exist in the welfare state (Davies and Esseveld 1985; Daly and Rake 2003). Because Sweden qualifies as a dual-earner dual-carer for all policy indicators in the policy analysis portion of the chapter, we can expect to find relatively lower unemployment rates for women. We can expect lower unemployment rates in Sweden due universal provision of welfare benefits and services combined with work-related income-replacement policies that encourage women to remain in the labor force and combine employment and motherhood. Unemployment rates are relatively low for Swedish women in the observed years. Table 3 shows slight variation observed in unemployment rate percentages in Sweden: 5.3 percent of women were unemployed in 2000, jumping to 7.3 percent in 2005 and lowering to 6.4 percent in 2007. Male unemployment rates generally mirrored women's rates for the same years: 5.9 percent of men were unemployed in 2000, to 7.3 in 2005, and decreasing to 5.9 in 2007. The Swedish welfare state's policy logic of gender equality through comprehensive coverage and policies promoting high employment rates suggest that state intervention in the labor market may contribute to the lack of a gender gap in unemployment rates between the sexes.

Wage differentials between women and men are an important indicator of gender inequality, giving us a picture of the advantages and disadvantages associated with women's employment relative to men's. Wage differences are a key explanatory variable that tends to reflect the structuring of the labor market

along gender lines: far fewer women fill middle and upper management positions in business and the majority of women tend to find careers in sectors with lower wages (Matheja-Theaker 2003). Career breaks, lack of seniority, and part-time work also contribute to women's wage discrimination as women who choose to have a family or become unemployed cannot accumulate as many years of continuous employment (Matheja-Theaker 2003). Lower earnings also may limit women's access to work-related benefits including pension.

Wage differences in Sweden generally reflect gender segregation of the labor market. According to the Swedish National Mediation Office, Swedish women's wages have been 18 percentage points lower than men's over the last decade (2003). The official gender wage gap statistics reflect average gender wage differentials in the whole labor market. Many factors affect wage differentials and wage gaps vary depending on the sector of the labor market being examined. When examined by job sector, the wage gap closes to about eight percentage points (National Mediation Office 2003). Sweden's gender wage gap reflects the relatively low levels of gender inequality in the country and conforms to criteria apart of the dual-earner dual-carer model.

### **Conclusion**

The Swedish welfare system can be characterized as a dual-earner dual-carer gender model that actively supports women's employment, advancing gender equality through state intervention to transform the traditional division of labor between the sexes without favoring and compensating paid work above unpaid domestic work (Sainsbury 1999: 260). Sweden promotes a particular set of gender relations in order to enhance gender equality: policies encourage women's full participation in the labor market and encourage men's care giving responsibilities (Nyburg 2004). As distinct from other welfare regime types, the social-democratic model supports both equality of opportunities and equality of outcomes by promoting "the equal presence of women and men in all spheres of society" (Sainsbury 1999: 260).

Sweden qualifies as a dual-earner dual-carer model under all policy indicators examined including parental leave, pension scheme, public childcare, and entitlement bases. Sweden's policy logic has translated to high levels of gender equality in outcomes including high female employment rates, low female unemployment rates, and a low gender gap in earnings across a variety of employment sectors. The expansion of social services in the public sector and direct state intervention on behalf of women's full employment has contributed to high female employment rates.

Sweden does not discriminate through entitlement bases: there is equal access to parental leave, pension, and childcare based on citizenship. The principle of citizenship as a basis of entitlement to benefits is a distinctive feature of social democratic regimes and produces equalizing affects and transforms social rights and conditions for women. Equal access to benefits entitles all women to a standard of living yet unequal outcomes persist between men and women due to differentiated access to work-related benefits that cannot shield the penalties women face in the market in terms of lower pay, part time work, and career breaks. Substantial job-protected parental leave is granted to both parents with nearly full compensation for the first 13 weeks; the lower duration of payments after that period is compensated for by a combination of other social benefits including public child care, child and family cash benefits, and parental insurance. While all Swedish women qualify for pensions independently through work and citizenship entitlement bases, the Swedish pension system maintains a level of gender disparity in terms of pension benefit levels: women on average have lower pensions as a result of lower lifetime earnings (Bonnet & Geraci 2009). Disadvantages in outcomes under the Swedish welfare model include high gender segregation of the labor market and high rates of part-time work for women. Swedish women are still responsible for the majority of unpaid care work in the home; policy conditions entitling men to care work benefits have not significantly altered the sexual division of labor within the household. As the Swedish case has shown, state intervention in the labor market along with policies that facilitate the

intersection of care and employment under a dual-earner dual-carer gender model may relieve women's vulnerabilities in the labor market, but may not result in universal gender equality in outcomes.

**Table 3**

**Table 3: Female and male employment, unemployment, and part time rates in the Sweden**

		Percent		
		2000	2005	2007
<b>Employment</b>	Women	72	72	73
	Men	76	76	78
<b>Unemployment</b>	Women	5.3	7.3	6.4
	Men	5.9	7.3	5.9
<b>Part-Time</b>	Women	—	—	19.7
	Men	—	—	9.5

*Source: OECD 2000, 2005, 2007*

*Part-time: OECD Social Indicators 2009*

## **CHAPTER SEVEN: CONCLUSION**

My thesis has measured gender related policy and outcomes within a dual gender model of ideal types to gain more insight into the relationship between gender relations and the welfare state. Locating women within gender-related policy broadens our understanding of welfare state affects upon gender. A comparative feminist framework allows particular attention to be paid to the spheres of social life commonly recognized as “private” and often disregarded by mainstream research. Gender as an explanatory concept of social relations widens our understanding of welfare state processes and relations that intervene in the social order. The value and meaning of care work and unpaid household labor along with women’s agency and independence in welfare state relations is accounted for by selecting gender-relevant dimensions of variation and outcome in welfare state analysis. By separating gender out and measuring the extent to which each welfare state conforms or deviates to the ideal dual gender model, I hope that the gendered nature of welfare states and gender variation across and within countries might be better understood in empirical analysis of the welfare state.

Feminist adoption of the comparative perspective has shown the variation of the male breadwinner model across countries and over time. My thesis has examined the impact of the male breadwinner model and the dual-earner dual-carer model upon gender relations through state social provision by using gender-relevant dimensions of policy analysis frequently neglected in traditional welfare state analysis. The basic argument premises that the relationship between state policies that intervene to support different types of individual and family arrangements affects the stratification of outcomes for women. Variations in welfare state policy may be related to patterns of variation in female employment, unemployment, pay equity rates between men and women, and birth rates across countries. In this chapter, I continue the feminist comparative analysis of welfare states by comparing policy and outcomes across countries while also employing the dual ideal gender policy model for its explanatory power. This will provide additional

insight into the way welfare state types and gender models construct gender relations through policy that may enhance or limit gender inequality in democracies.

### **Variation in Gender Policy**

Maternal and parental leave is one of the most significant indicators measuring care-related social policy. Considerable variation exists between maternal and parental leave in the countries under examination, especially when entitlement base and the level of duration and payment measured. In terms of duration, combining maternal and parental leave together reveals that Sweden offers the longest duration of leave (68) weeks followed by Germany (in 2007, 114 paid weeks changed to 66 weeks), followed by the UK (52). Payment varied considerably between countries: Germany offers 14 week maternity leave at 100 percent income replacement and 52 weeks paid parental leave at 67 percent income replacement, the UK offers a 90 percent income replacement rate for the first six weeks of leave and the rest at a flat rate, and Sweden grants a 16 month parental leave at 80 percent income replacement with the last 90 days paid at a flat rate. In terms of basis of entitlement to maternal and parental leave, Germany allocates benefits based on motherhood, work, and care; the UK offers work-based entitlements and needs-based poverty assistance to those parents who do not qualify; and Sweden provides universal parental leave to both parents in equal shares based on citizenship and offers supplemental work-based paid leave.

All schemes entail advantages and disadvantages for women. Table 4 provides a brief reference guide for comparing maternal and parental leave characteristics upon three different dimensions including duration, payment, and entitlement. Sweden provides the most comprehensive coverage in terms of duration, payment, and entitlement base: access is universal and payment is income based for those who qualify through work. Germany has altered its maternity leave away from the male breadwinner model and toward a dual-earner dual-carer model by cutting its means-tested paid maternal and parental leave from 114 weeks to 66 weeks at a 67 percent income replacement rate in order to increase the return-to-work

rate for mothers. The UK provides the least adequate parental leave that is work-based at a 90 percent income replacement rate for the first six weeks and the rest of the 52 weeks at a flat rate, maternity allowance is offered for those who do not qualify.

Pension affects women's economic opportunities and level of independence throughout the life course and significant gender disparities exist in pension income within and across countries. To compare pension schemes between countries I examine the basis of entitlement along with payment. Women in Germany can claim pensions through work or marriage, the UK offers pensions through motherhood, care work, and work, and Sweden provides entitlement to pensions through citizenship and work. Germany provides pensions based on the number of years employed, average achieved earnings during work life, and retirement age (with child pension credits of up to 3 years per child for unemployed mothers). The German pension scheme relies on the family and labor force to provide full retirement pay (26 years of labor force participation); the scheme offers little care-based pension entitlements and part time workers are only entitled to part time pension plans. UK basic pensions are based on the number of years of contribution paid at a flat rate, the State Second Pension provides extra pension provision based on earnings at or above the Lower Earnings Limit, and offers a basic state pension for care work for 16 years care work per child if contributions are paid for at least half the qualifying years. Sweden provides a universal citizenship-based means-tested pension for anyone living in Sweden for at least three years and an earnings-related pension that is income based and dependent on the number of years of contribution for full pension benefits. Sweden offers the most protection for all citizens through its residence and work-based dual pension scheme that leads to an equality in access to pensions but maintains some gender inequality in its earnings-related income-based pension scheme.

Germany and the UK offer inadequate and varied pension schemes: Germany does not offer a guarantee minimum pension; pension entitlements can only be accrued through work or marriage while the UK

provides a basic work-based pension and an earnings-related supplemental pension for those with higher earnings. Considering that Germany has historically encouraged stay-at-home motherhood through welfare policy, its work-related pension scheme is particularly inadequate and discriminative to women. The UK offers a flat rate (inequality-reinforcing) basic pension for workers, an earnings-related supplementary pension that affords some women access to adequate pensions, a Basic State Pension through care work, along with marriage-based pension entitlements. In terms of a gender policy model, Germany and the UK align with a male breadwinner model and Sweden conforms to the dual-earner dual-carer model thanks to a universal minimum pension.

Public childcare rivals maternal and parental leave as the most important policy dimension in care-related social policy. The gender equalizing affects of childcare cannot be understated: not only does affordable public childcare convert care into paid work, it sets limits to care responsibility for individuals and at the same time compensates women's unpaid care work and allows women to stay in the labor market. Both Germany and the UK offer little to no public childcare support for women while Sweden offers nearly universal access to public childcare. Sweden's generous public childcare scheme is a main feature in dual-earner dual-carer models and may be associated with higher rates of gender equality in outcomes. Sweden is distinguished from other welfare states through the quality and range of publicly financed service production; in particular, women's equal right to work and have children is advanced through its childcare services.

### **Variation in Gender Outcomes**

Table 5 shows great variation in women's employment rates among the three countries examined. Measured on the basis of the employment rate of the total working age population, variation in 2000 ranged from a low 58 percent female employment rate in Germany to a 72 percent rate in Sweden; a 14 percent difference among the welfare states. Variation in the year 2005 ranged from 60 percent in

Germany, to 67 percent in the UK, and 72 percent in Sweden. By 2007, the gap between Germany and the UK narrowed to a three percentage point difference: 63 percent in Germany and 66 percent in the UK, while Sweden maintained a 73 percent employment rate.

Men's employment rates outnumbered women's in all three countries for all three years. The gender gap in employment rates persisted in all three countries between the seven year period examined. Only Germany showed significant change in women's employment rates: increasing from 58 percent in 2000 to 63 percent in 2007. The UK and Sweden increased by only one percentage point in the seven year period examined. Interestingly, men's employment rates across countries were high and varied slightly: Germany featured the lowest male employment rates in the low 70s, the UK possessed the highest rates of male employment at 79 and 78 respectively, and Sweden trailed a few points below the UK in 2000 and 2005 at 76, increasing to 78 in 2007.

The gender gap in employment rates between the sexes showed much variation: in the year 2000, 73 percent of working age German men worked whereas only 58 percent of working age German women worked, a 15 percentage point gap. The gender gap in employment narrowed only 3 percentage points by 2007 in Germany with a 12 percentage point gender gap in employment. The UK displayed a gender gap between 13 and 12 percentage points during the years examined. In 2007, 66 percent of women were in paid work as compared to 78 percent of men. Sweden displayed only a small gender gap in employment between 4 and 5 percentage points across the years, indicating that Sweden's gender policy has translated into low levels of gender inequality in terms of specific outcomes like employment rates. The Swedish welfare state's policy logic of gender equality through comprehensive coverage and policies promoting high employment rates suggest that state intervention in the labor market may contribute to the lack of a gender gap in unemployment rates between the sexes.

Turning to women's unemployment rates, Table 5 shows slight variation across countries. As expected, Germany featured the highest rates of female unemployment, followed by Sweden. The UK's low rates of unemployment may be attributed to its liberal welfare policy logic limiting state intervention of the labor market and through the provision of work-based entitlement to social provisions. Over the seven year period, German women's unemployment rates ranged between 3 percentage points, while Sweden women's rates ranged between 2 percentage points, and the UK ranged under 1 percentage point. This conforms to expected outcomes for countries in terms of welfare state typologies: Germany has a legacy of promoting stay-at-home motherhood through its policy logic, while the UK, a work-based welfare system, limits state intervention in the market.

Part-time rates showed variation across countries in 2007. Table 5 shows nearly 40 percent of working age women in Germany and the UK are part time workers, while nearly 20 percent of Swedish women work part-time. Compared to men's rates, a significant gender gap in female part-time work was observed across countries: a 31.3 percentage point gap in Germany, followed by a 28.7 percentage point in the UK, followed by a 10.2 percentage point gap in Sweden. The 20 point difference between Swedish women's part-time rates of employment compared to Germany and the UK's women's rates of part-time employment may point to the gender variation in outcomes between the gender models. Although women in all countries have higher rates of part-time work relative to men, dual-earner dual-carer gender models like Sweden may be associated with lower rates of female part-time employment as compared to the male breadwinner model.

Table 6 shows birth rates across countries for the years 2000 and 2006. Both Sweden and the UK have higher birth rates than Germany and these rates increased over the period of change observed. With a replacement rate of 2.1, the UK's birth rate for 2006 was 1.79, followed by Sweden at 1.75, followed by a birth rate of 1.38 in Germany. Here, the maternal and parental leave policies of the observed countries are

relevant: Germany recently altered its maternal and parental leave scheme in order to increase women's return-to-work rate in attempts to increase its comparatively low fertility rate. In 2007, Germany replaced its two year means-tested paid leave with a wage dependent year of leave at 67 percent of net earnings for the stay-at-home parent (Spiess & Wrohlich 2006). Germany's step toward a more Scandinavian dual-earner dual-carer model to increase female employment and fertility rates may indicate that a male breadwinner gender model tied to a conservative Christian welfare policy logic results in comparatively lower birth rates.

Wage differentials are an important indicator measuring the financial advantages and disadvantages associated with employment for women. Wage differentials showed moderate variation across countries. The UK featured a comparatively high gender wage gap: women earn 22.6 percentage points less than men in 2009. The male breadwinner policy model and liberal welfare policy logic that characterize the UK under all the selected gender policy including bases of entitlement, maternal and parental leave, pension and the lack of early public childcare facilities may be associated with higher wage differentials and lower support of female income levels relative to men. Germany also featured a high gender wage gap in earnings: women made 24 percentage points less than men in 2004. Over the last decade, Swedish women's wages have been 18 percentage points less than men's in the total labor force. This small comparative difference in wage gaps between the selected countries may indicate that the lower levels of gender inequality associated with dual-earner dual-carer gender models like Sweden also result in lower wage differentials between men and women.

Germany consistently conformed to a male breadwinner gender model throughout the research. In terms of outcomes across the three countries, Germany features the lowest female employment rate, the highest gender gap in employment between the sexes, the highest female unemployment rate, and the lowest birth rate. In terms of gender policy across the countries, Germany recognizes work, care, and marriage as a

basis to entitlement to benefits; it provides extensive maternal and parental leave scheme in terms of duration (over a year) and generous income replacement payment scheme; adequate pension benefits are accrued only through work and marriage while adequate public childcare does not exist.

The UK also consistently conformed to a male breadwinner gender model through both policy and outcomes. In terms of outcomes across the three countries, the UK featured significantly higher rates of female employment than German women, a high 12 to 13 point gender gap in employment rates between men and women, the lowest female unemployment rate, and relatively high birth rates. In terms of gender policy across countries, the UK recognizes work, need, care, and marriage as bases to entitlement to benefits; it provides inadequate work-based maternal and parental leave that is long in terms of duration but low in allowance pay (first 6 weeks at a 90 percent income replacement rate; following 33 weeks paid at flat rate); an adequate pension scheme accrued through work, care, and marriage provides some support to women; while childcare is privatized in every respect save for poverty and disability assistance.

Sweden conformed consistently to the dual-earner dual-carer gender model. In terms of outcomes across countries, Sweden had the highest female employment rates, the lowest gender gap in employment rates, low levels of female unemployment rates, and relatively high birth rates. In terms of gender policy across countries, Sweden recognizes citizenship and care as bases to entitlement to benefits; provides both parents with generous parental leave in terms of duration and payment (68 weeks with an 80 percent income replacement rate and a flat rate for the last 90 days); pensions are generous with equality in access through a universal minimum pension and earnings-related supplementary pension that resulting in a gender gap in pension income between men and women; and widespread public childcare is available to nearly all citizens.

Alternative factors influencing the gender division of welfare states include political institutional explanations and social movements such as the women's movement. Political institutional explanations

including how the form of the state, party politics and party systems, along with electoral systems contribute to the gender division of welfare are important explanatory factors; however, the focus of the research has been on policy regimes and the study of variations across a number of areas of policy that narrow political institutional explanations may not fully capture theoretically or empirically. Therefore, political institutional explanations may have more relevance for individual countries or countries within the same welfare regime typology while welfare and gender models mean to explain broader variations in policy and outcomes across countries. Political institutional explanations may also overlook feminist critiques of the state and arguments for gendering male-associated concepts of citizenship and welfare meant to enhance women's political and private rights and thus, access to the state. Both political institutional and welfare regime typologies share an inadequate theorization of the political interests and conflicts of gender and lack specifically gendered dimensions of analysis related to welfare state provision. Feminist research on the welfare state has shown how countries in the same welfare regime do not correspond when care-related policy dimensions are incorporated into traditional welfare state analysis (Sainsbury 1996; O'Connor et al. 1999; Daly and Rake 2003). Similarly, while my research findings align each state with Esping-Andersen's welfare regime typologies, the gender regime model was nevertheless analytically useful in order to explain how states vary in terms of maternal and parental leave, pension, and childcare and the implications these differences have on cross-national gender outcomes. A two-fold gender model supplements the welfare regime typologies by including some of the neglected gender dimensions within welfare policy that structure gender outcomes and thus do not align with the three welfare regime types.

Gender relations compared across countries with different welfare and gender models show variation in all of the dimensions observed. The concluding chapter has put the indicators of gender policy and outcomes into a comparative perspective of the welfare state. These empirical case studies show important interactions between the privatized care of the family, the labor market and welfare policy

impact gender relations in three European welfare states. The research confirms existing findings in comparative feminist welfare state analysis, including research associating Sweden with a dual-earner dual-carer gender model and Germany and the UK with a male breadwinner gender policy model (Sainsbury 1996; Pascal and Lewis 2004). Through an analysis of welfare state policy and outcomes based on an dual ideal-type model of gender policy that incorporates both paid and unpaid work, patterns of variation in gender relations central to the welfare state have highlighted some of the trade-offs women face in terms of balancing employment and care work.

## **Tables**

**Table 4: Maternal and Parental Leave Provision**

	<b>Duration</b>	<b>Payment</b>	<b>Entitlement Base</b>
Germany	170	Income	Motherhood/Care
UK	52	Income/Flat	Word/Need
Sweden	68	Flat/Income	Citizenship/Work

**Table 5: Female and male employment, unemployment, and part time rates in Germany, the UK, and Sweden (male rates in parentheses)**

		Percent		
		2000	2005	2007
<b>Employment</b>	Germany	58(73)	60(71)	63(75)
	UK	66(79)	67(79)	66(78)
	Sweden	72(76)	72(76)	73(78)
<b>Unemployment</b>	Germany	6.7(7.5)	10(11.5)	8.3(8.2)
	UK	4.8(5.9)	4.3(5.2)	5.0(5.6)
	Sweden	5.3(5.9)	7.3(7.3)	6.4(5.9)
<b>Part-Time</b>	Germany	—	39.4(7.4)	39.2(7.9)
	UK	—	39.3(10.0)	38.6(9.9)
	Sweden	—	—	19.7(9.5)

*Source: OECD 2000, 2005, 2007*

*Part-time: OECD Social Indicators 2006, 2009*

**Table 6: Total Fertility Rates in Germany, the UK, and Sweden**

	Birth Rate	
	2000	2006
Germany	1.33	1.38
UK	1.64	1.79
Sweden	1.55	1.75

*Source: OECD Social Indicators 2009*

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