

## Focusing on Care: Family Policy and Problems of Analysis.

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## **Zu der Autorin**

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## **Abstract**

This paper addresses problems of analysis in family policy and suggests new standards of examination. The first part of the paper outlines Esping-Andersen's interpretation of family policy and its functions within the welfare state from his 1999 work "Social Foundations of Postindustrial Economies." I explain how the terms defamilialization, familialism and non-familialism and their influence on other authors incompletely address families with regard to current issues. I show that the conceptualization, measurement, and interpretation of family policy are lacking. This has consequences for addressing and interpreting overall welfare state development. In the second part of my paper, I propose a conceptualization to interpret family policy which especially addresses the perspective of the general carer in the welfare state. Here is a focal point that gives better insight into the welfare state crisis and how a welfare state could be more adequately conceptualized. The issue of care, I argue, is very much part of what has become a question of the welfare state function and the problems faced by the welfare state. The terms that I have coined to capture family policy functions in the welfare state with an analytical focus on care are carer-commodification and carer-stratification. They have their theoretical roots in empirical studies on family policy developments in the U.S. and the U.K. Finally, I extend these terms to interpret other European welfare states and their family policies.

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## 1. Introduction

Family policy is a difficult term to define. Likewise, its conceptualization, measurement, and interpretation in welfare states remain difficult.<sup>1</sup> This paper addresses the theoretical approach in the conceptualization of family policy captured through the theoretical framework of Gøsta Esping-Andersen's defamilialization and familialism/non-familialism (Esping-Andersen 1999). These terms are currently used as a tool for interpreting family policy within the welfare state, but I argue that they are confusing and ambiguous, especially when it comes to analyzing the situation of care and the carer in the welfare state, and stratification in the labor market. The terminology of defamilialization/familialization examines the policy recipient as a primary carer or primary worker, describing then the process of primary carers becoming primary workers.<sup>2</sup> An important aspect of this illustration is that family policies are boxed in to several different categories as carer or worker depending on whom the policy addresses. While this analysis looks at a process of carers turning into workers, the terminology makes it difficult to illustrate the current situation of carer and worker as one.

This lack of analysis is problematic because as more women enter the workforce, their care duties are not (and can not) magically be eradicated from state (or market) intervention. Indeed, there is no way in which women can become their contemporary male colleagues with wives at

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<sup>1</sup> One difficulty in analyzing family policy arises from definitions: Potentially, a broad definition of "family policy" could cover every government action that affects families. Indeed much of family policy research has suffered from a definition deficit, in that the policies being compared, or the conceptions of "family" and the objectives of family policy, are not defined consistently across nations and across disciplines. Within each nation, multiple "types" of social policy -- whether implicit or explicit -- touch areas in health, education, social services, income maintenance, housing, and employment. On the other hand, policy might include a collection of separate but interrelated policy choices that aim to address problems that families are perceived as experiencing in society (Zimmermann 1995). Family policies also function in different ways: some of their effects are explicit, stating clear objectives for the family; others have implicit unintended effects or consequences for families.

<sup>2</sup> Or describing the reverse process. See the Schleutker article in this WIP edition about fathers in Sweden and Finland who as primary workers are conditioned through the state to perform more care work.

home, nor can a truly standard male breadwinner exist, if his wife is also in the labor market and there are dependents at home. It is only possible for carers in the home to be on equal footing with “worker” standards of the past if -- and only if -- women and men purchase care or the state provides it in the equal mass of what has before entailed unpaid care work. To some extent, this “defamilialization” could describe such a situation: Defamilialization is about what the state (or the market) provides in ways of helping families (not individual family members) be less burdened with their care duties. A truly ideal extreme defamilialization could then in theory be a situation in which the state (or the market) “unburdens” families with all of their unpaid care duties. However, the tricky part of the analysis is 1) whether this is possible, and 2) how, meanwhile, the analysis mixes market and state “unburdening” supports, where the market is most likely to result in uneven supports. This results in stratification among carers who are also workers, but because there is no sharp delineation between market and state, it causes such stratification to remain invisible.

The welfare state has profited from more women in the workforce resulting in more tax revenue income, social capital, and so on. Likewise, pressures of working women have forced the state to rethink its care responsibilities and to develop policies accordingly. Yet, how do we know where these policies are going, or what sort of new lines of stratification are occurring in the welfare state? More women are in the European labor market than before, which results in new forms of family and poses modern risks and problems. The welfare states have undergone changes in family policy with newly established policies, for example, in the form of family leave or credits of caring in old-aged pensions. Scandinavian countries, among others, have also attempted to establish special policies for fathers to involve them in care taking. Indeed, within the current retrenchment and scaling back of the welfare state, employment-related family policy has grown and even flourished. This paradoxical trend is well-documented, although only recently in a descriptive, normative way. Paul Pierson has called the growth of such policy a “recalibration” type of policy: the welfare state evaluates what is needed and modernizes its services (Pierson 2001).

Other researchers have seen this policy response by the welfare state as a fight against “new social risks”: those caused, for example, in the modern society, where care workers are employed (see for example, WRAMSOC 2004). But, in this rapidly growing and changing policy, little research has been conducted specifically in these important areas: How are countries handling care work and a right to family policy? How is this welfare state response to be conceptualised, measured, and interpreted?

## **2. Care in employment-related family policy<sup>3</sup>**

One characteristic of the changes (and expansions) in family policy has been its more direct bond to employment, as, for example, in European Union Directives. If indeed family policy is inching towards a “employment-related family policy,” can this in effect cause policy makers to lose sight of families themselves as worthy of direct policy? I use the term “employment-related family policy” here to emphasize the connection between employment and care work, when women are entering the workforce in greater numbers and there is a welfare state interest of women to be in employment. I use this term to describe the connection of family policy with employment. From a feminist point of view, the examination of employment-related family policies, in themselves, connects on the one hand, how employment gives women autonomy and less dependence on their employed partners, and yet on the other hand, encapsulates the terms on

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<sup>3</sup> With the term “employment-related family policy” I want to specifically emphasize policy that intersects employment and families. For this paper, I concentrate on employment-related family policy which deals specifically with the care work of children. Explicit employment-related family policy, which are directly related to employment and the family, could be for example: parental leave, the tax credit system, welfare-to-work programs in social assistance, and childcare. All of these policies in some way relieve the problems that families might experience while trying to juggle employment and family. I have chosen the term “employment-related family policy” deliberately as a contrast to what some have called “reconciliation policy” (see Hantrais 2001; Mazur 2002; Gornick & Meyer 2004). Reconciliation policy promotes a so-called “work-life balance” or assistance in reconciling work and family life. However, I do not use this term to describe such employment in intersected family policy in general. While reconciliation policy is one objective of employment-related family policy, it is certainly not the entire objective, and sometimes not the main policy objective at all.

which a carer enters the labor market. More theoretically, I am interested in the way in which expectations of citizenship involving care and employment are being redefined. The fusion of family policy with employment policy is not something that I see as excluding other family policies, such as Child Benefit in the United Kingdom (U.K.) for example, but merely offering a perspective to observe family and employment policies together, their interaction and logics. If one is interested in a welfare state, market, and family mix ideal which promotes a universal carer/worker citizenship status (with corresponding equal rights and equal responsibilities), then taking this perspective of connecting care work and employment offers the observer a place to start measuring. For example, employment-related family policy can also illuminate the chances of men (who are more strongly tied to the labor market than women) to take the opportunity to care. If a researcher is interested in examining a worker/carer as a standard norm, then family policy is logically connected to employment policies, and in this case, should be examined as such.

A framework of employment-related family policy illustrates the fusion of family policy and employment policy, not in a development which Nancy Fraser calls a universal breadwinner model (Fraser 1996), but in a state in which stratification within care work and employment can be analyzed. Fraser's universal breadwinner is a welfare state ideal type where gender equity does not occur because a male standard of employment is used, and women spend their time "catching up" with their male counterparts. I argue below that Esping-Andersen assumes this kind of universal breadwinner model, because of the inability of the terms "defamilialization" to differentiate how care work and the carers are stratified from within the framework of commodification and decommodification.

Nancy Fraser has inspired the content of this article with her focus on care and carers as an analytical tool for welfare state evaluation. My analysis of care work is within the framework of employment-related family policies, and it is not concerned with looking for an ideal care-centered society, as Fraser does in detailing and evaluating her three utopias (Fraser 1996). An ideal type of "universal caregiver" utopia is too distant from our capitalist



ordered society today (Woods 2005), and is too far away from present policy to be a standard of measurement. Instead, a capitalist system is the frame of reference where selling one's labor is a necessary commodity to survive where such systems create uneven outcomes. Within this system, then, it is important to analyze how carers are indeed instrumented in policy or employment policy (or outside of it) and stratified. How are carers as individuals commodified in the labor market, and indeed how are they in turn compensated through money and time for care work?<sup>4</sup> Answers to these questions are most likely to be found in employment-related family policy. Just as Esping-Andersen was interested in looking at how a welfare state deals with the effects of capitalism for workers, why not go further and look at how welfare states commodify carers (with their connection – or not – to the labor market)? Here are chances to gain insight into differences 1) among carers, and 2) between carer-workers and noncarer-workers. Here lies a better understanding of the “whole” picture of how capitalism works for men and women, carers, and non-carers.

### **3. Defamilialization, familialism and non-familialism**

Gøsta Esping-Andersen, in his book *Social Foundations of Postindustrial Economies* (1999), adopted and expanded the term defamilialization to explain how women and men are able to enter the labor market in an equal way.<sup>5</sup> Using this term he evaluated how the state (or market) made it possible for women (assuming them also to be carers) to enter the labor force, by reducing the risks and responsibilities within the family.<sup>6</sup> Thus, de-

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<sup>4</sup> I emphasize not the family as a unit, but specific family members.

<sup>5</sup> Coined earlier by authors McLaughlin and Glendinning (1994).

<sup>6</sup> Esping-Andersen measures defamilialization as the degree “to which households’ welfare and caring responsibilities are relaxed either via welfare state provision or via market provision” (Esping-Andersen 1999: 51). He concretely names the indicators of these provisions: 1) overall servicing commitment (non-health family service expenditure as a percentage of GDP), 2) overall commitment to subsidizing child families, 3) the diffusion of public childcare (day care for children less than 3 years of age), and 4) the supply of care

familialization served two purposes: 1) it could describe the modern phenomenon of family policy and the possibility of women's inclusion in the labor market, and 2) the term could also be added to the commodification and decommodification evaluation criteria of welfare states in Esping-Andersen's earlier *Three Worlds of Welfare State Capitalism* (1990) and thus incorporate women's perspective into the welfare state models. Esping-Andersen evaluated women first for their potential for commodification through defamilialization, and thus incorporated their situation into the commodification-decommodification systems of his three welfare state types.

However, this kind of logic is flawed in several ways. First, the terms defamilialization and decommodification are not easily separable. Some policies (i.e., defamilialization) might encourage women into the workforce, if the market, or the state, can take care of the family risks; however, those same policies might lead employees to leave the labor market, for example, to perform care duties. If so, they would be examples of decommodification. This lack of clarity in terminology or measurement is problematic and, when looking at welfare states, it is hard if not impossible to say whether defamilialization has preceded the commodification of women. My second major criticism of defamilialization is related to the first. The term cannot completely address the way a liberal welfare state, for example, deals with families in a residual way, but women are still in the labor market. While Esping-Andersen differentiates between market defamilialization and state defamilialization, it is still problematic to talk about the market as reducing risks in the family that make it possible for carers to work. Much more it is the commodification of the market that pressures women into work. Here is where commodification and defamilialization coincide, and it is difficult to talk about risks and stratification.

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to the aged (percentage of aged 65+ receiving home-help services (Esping-Andersen 1999: 61). Interestingly, Esping-Andersen's three models of 1990 remain intact as distinct welfare state types, because of defamilialization. He states: "an empirically based reexamination along these lines [defamilialization] confirms more than it disconfirms the validity of a simple conservative liberal, and social democratic regime trichotomy" (Esping-Andersen 1999: 46).

The problem with the “defamilialization” term is that it follows a logic where women are compared to men in old employment structures. That is, defamilialization says that *before* women could equally engage in employment on the terms of men, i.e., be commodified and have the opportunity to be decommodified, women first needed to be freed from household and caring responsibilities. Esping-Andersen adopts the tradition of Orloff (1993), O’Connor et al (1999), and others, where defamilialization is a precondition for women’s capacity to commodify themselves or to set up independent households (for discussion, see Leitner et al. 2004: 16ff). However, when measuring women’s status to men’s, the question becomes: what happens to those women in welfare states who do not measure up to men’s commodified status, and more importantly, what happens to care work on a welfare state evaluation radar? Is it possible for a state or a market to absorb all care work risks of the family? The problem is that defamilialization focuses on the obstacles that keep women from entering the workforce in the same way as men, instead of also concentrating on how care work gets done at home.<sup>7</sup>

**Figure 1: Logical problems in Esping-Andersen’s analysis**

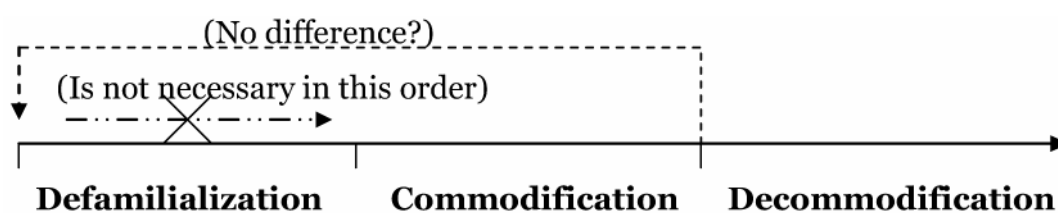


Figure 1 (above) sketches out the theoretical description of how families fit into the welfare state and labor market types according to Esping-Andersen (in bold and solid lines/arrows). The dotted lines/arrows illus-

<sup>7</sup> Another problem with the term defamilialization is the fact that states might be eliminating family risk by removing obstacles to employment for women and parents, but this kind of success hinges on whether or not family members are working in the first place.

trate my critique of the theoretical sequence and bounded descriptions of each phenomenon.

In addition, the authors Knijn and Ostner (2002) make several points about commodification and decommodification over time. First of all, commodification and decommodification are processes that have historically evolved as interrelated, and this has affected women differently. While, on the one hand, governments allowed labor movements to become stronger (with the interest that the labor movement would produce a steady supply of laborers), the labor movements themselves were also interested in monopolizing their position (in terms of social closure, segregation, and skilling) (Knijn and Ostner 2002: 145; Berger and Offe 1982; Offe 1985). This in effect limited commodification, or in many cases, encouraged the male-breadwinner model type of welfare state. Secondly, the authors point out that historically, decommodification of old age and family was a relatively late development (Knijn and Ostner 2002: 148), and wives were logically decommodified through their husbands' commodification, where men relied on women's household work to remain in the workforce. They point out that new commodifying strategies are those "activation" or "recommodification" policies that attempt to put the unemployed "workless" or "inactive" able-bodied members of the society into the workforce, which -- with respect to women -- encourage, seduce, or even force them to be commodified, thus ending an era of the traditional male-breadwinner model (Knijn and Ostner 2002: 151).

Yet, beyond these confusing elements of commodification, decommodification and defamilialization through markets and through the state, Esping-Andersen brings in yet two other elements to describe relationships of family to the state and market: familialism and non-familialism. These concepts here are underdeveloped, and do not complement or compensate for the deficits of defamilialization.

The term "familialism" does not follow a clear characterization. According to Esping-Andersen, the term "familialism" is the opposite of defamilialization. A familialistic welfare regime is "...one that assigns a maximum of welfare obligations to the household" (Esping-Andersen 1999:70) and

where family risks are absorbed primarily by the family. Unsatisfactorily, the familialistic regime seems to be another term for the male-breadwinner model. Esping-Andersen takes the conservative regime as example of a familialist regime and its discouragement of women's full-time, life-long participation in the labor market as a major example of how the welfare of the family remains centered on the family. And yet, I argue, in a conservative regime the value of care work is compensated. Indeed, Esping-Andersen agrees:

*Conservative-Catholic (and Confucian) policy is not adverse to “de-commodifying” the male bread-winner via income guarantees (the just wage) because this is a way to strengthen, or at least reproduce, patriarch and traditional family dependencies; women’s economic dependence on the male; and males’ social reproduction dependency on the female.... (Esping-Andersen 1999: 45-46).*

When a conservative regime supports the family via the male breadwinner, (if only to insure that the male breadwinner and his family members depend on each other), the regime is, however, indirectly compensating or supporting care work. Family risks are indirectly covered by the conservative welfare state, which is not the case in a liberal welfare state. Esping-Andersen states that liberal countries belong to a “non-familialist” group. However, at its face value, “familialism” could apply to the United States (U.S.), in that it relies on the family to cover risks in what the state lacks in social policy. If familialism is a term that describes in what way families are expected to absorb risks, the U.S. is one in which households carry the principal responsibility for their members' welfare.

If familialism is taken as a function of the market and the state, Esping-Andersen argues that the U.S. is not familialist, because the market in effect reduces the reliance of individuals on family. However, as this term stands, familialism might still be applied to either Germany or Italy in the sense of a lack of market supports, but here we are no more the wiser as to the supports of care work provided by these welfare states. In fact, both countries are familialist but do not affect families the same way in terms of

care and stratification. Indeed, it would have been clearer if Esping-Andersen's analysis had differentiated between state and market.

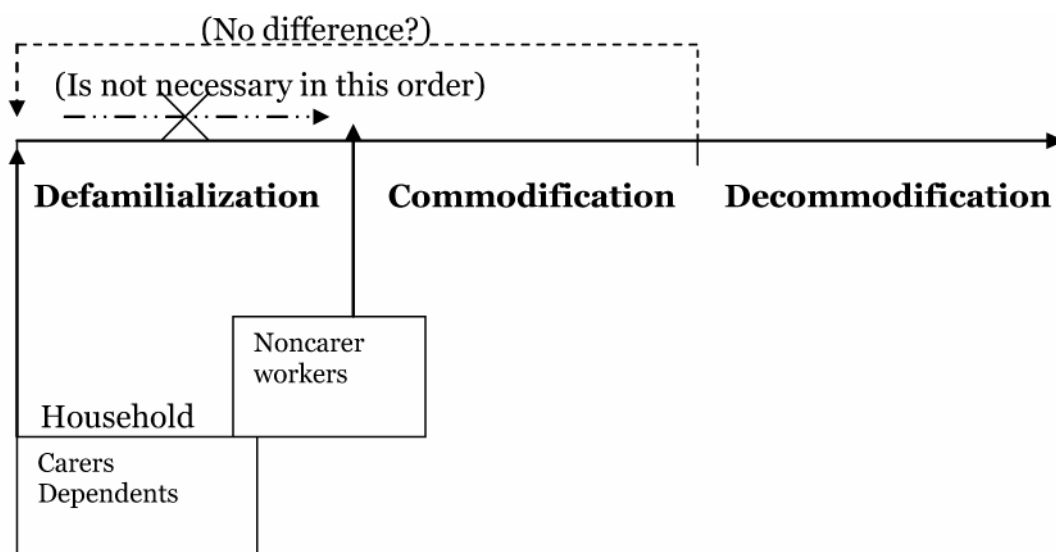
All in all, there is a loss as to describe and understand the family policies and how they interrelate with employment policies. Leitner et al (2004) have attempted to describe family policies with regard to negative and positive defamilialization. For example, the authors argue that defamilialization could include policy that reduces supports of carers via the breadwinner: in Germany, for example, cuts in widows' pensions are "negative" in the sense that one is pushed into the labor market (recommodification) through defamilialized policies. On the other hand, work/life balance measures in the form of guaranteed Kindergarten places are "positive" defamilialization policies (for discussion, see Leitner et al 2004). These positive and negative types of defamilialization and their corresponding effects on different types of women, depending on whether they are carers or not, and whether they are in the labor market or not, brings the analysis closer to differentiating how care work and employment are intersected and potential stratification effects. However, while these terms might be useful in describing individual policies, they are still not satisfactory for producing an overall view of the welfare state when it comes to carers and carer/workers.

If the defamilialization terms are more clearly defined and differentiated with specific policies, and elaborated (see Leitner et al.) to illustrate how some carers/non-carers benefit with certain policies and others do not, the conclusive way in which Esping-Andersen includes this defamilialization with commodification and decommodification is problematic for reaching an overview for carers/workers. For example, if we examine general "employment-related family policies" such as childcare, family leaves, or tax credits for families under the logical line of Esping-Andersen's defamilialization, commodification, and decommodification, we do not clearly see the situation of carers and their connection to the labor market. Childcare is an obvious case of a high defamilialization measure which frees up time and could lead to a higher commodification and potential for decommodification. However, measures such as family leave and tax credits are not as

simple. Parental leave could tie a carer closer to the market or closer to the family, considering the circumstances and perspectives of the household members. Tax credits intend to reduce burdens of low pay on families who work menial jobs, but for two parent households, an extra cash benefit might induce a carer to stay at home, considering the lack of high quality, low-cost childcare.

A better conceptualization of family policy needs to incorporate the perspective of carers. Only then is it possible to understand the stratification that happens among workers and carers, and how the welfare state might indeed improve its objectives of equal distribution, in terms of improving social welfare.

**Figure 2: Defamilialization and Carers according to Esping-Andersen**



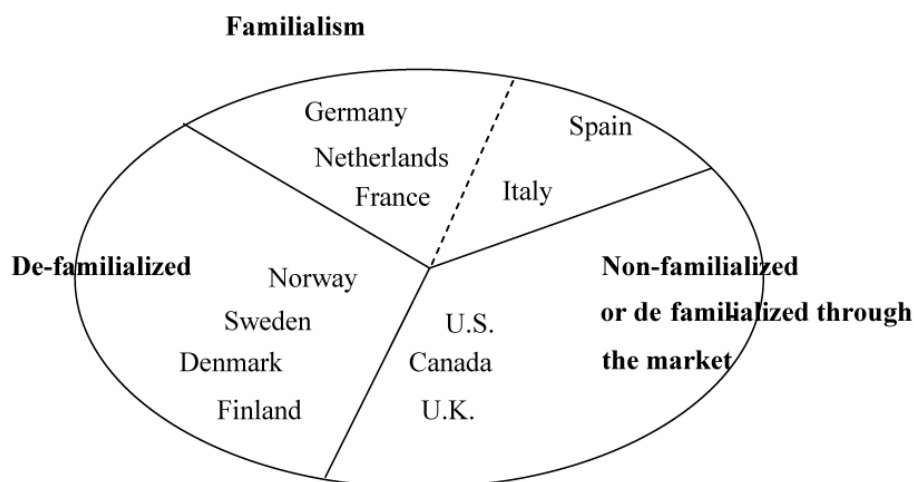
The graph in Figure 2 (above) shows the way in which carers fit into the Esping-Andersen conceptual sequence of defamilialization, commodification, and decommodification. According to the sequence, carers go through a process of defamilialization, but this is unclear if this defamilialization leads directly to carer's commodification. As outlined in Figure 1, it is problematic that decommodification and defamilialization of carers is

not clearly differentiated. While non-carer workers can receive a form of decommodification which allows them freedom to be independent of the market, the decommodification of carers and defamilialization works restrictively for carers: i.e., carers are decommodified from the market only in the sense that they are expected to perform care work at home, and carers are defamilialized only in the sense that they are more tightly bound to the labor market.

All in all, countries cluster around a specific welfare state function in terms of family: defamilialization, familialism, or non-familialism/defamilialization through the market. Defamilialization through the state occurs in the Scandinavian countries, familialism is predominant in continental European welfare states, but not much is differentiated between countries such as Germany, where there is a high degree of welfare state supports for the family (albeit through the primary breadwinner) and countries such as Italy with little state intervention. Non-familialistic countries, such as the liberal U.S., the U.K., or Canada, have degrees of defamilialization but through the market. These are characteristics perhaps of the way in which families might be able to enter the labor market, but we are none the wiser in terms of how carers and care work really function in market and state via employment-related policies. While families are one aspect, they are treated as “households”; the aspect of *care*, which is the family’s function in the state and market mix, is not addressed. This is problematic because care is an important foundation on which the state and market rest. The new question I ask is not what Esping-Andersen and others ask (“What is the state, market, and family mix?”) but rather “*What is the state, market, and care mix?*” Using this question, researchers can come closer to understanding the organization of modern society.



**Figure 3: Esping-Andersen's country clusters around defamilialism, familialism, and non-familialism**



Defamilialization, familialization, and non-familialization in Esping-Andersen's terms can only point to the possibility of carers' employment and possible decommodification on male breadwinners' terms. An understanding of carers, care work, and how their roles function in the welfare state and the market is essential to investigate now. To examine this more clearly, the researcher needs to focus on the way in which carers are commodified, i.e., made more dependent on the labor market and its upheavals/risks. In addition, there should be a consideration of supports for carers in connection to the labor market, as well as the market conditions for carers and care work.

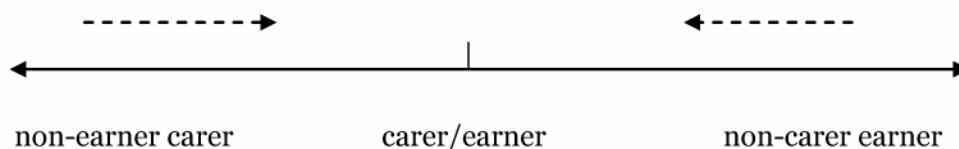
#### **4. Focusing on care to conceptualize family policy: carer-commodification**

In order to focus on care work and how it fits into the "state and market mix," I turn to employment-related family policy. I examine two neglected issues of the state of the art research on family policy: 1) the invisibility of the welfare state's treatment of carers in relationship to non-carers, and 2) the invisibility of differences among carers. This first problem stems from

welfare state research and its analytical focus on “households.” Using the household as a unit erases the care question because it neglects the distribution of duties and responsibilities of care within this unit. The second related neglected issue occurs because when the unit of the household is not broken down and distribution of care responsibilities is not considered, then the way in which care work is “outsourced” (through market or state supported services) is also unclear. The question of “how” carers are expected to enter the labor market cannot be accurately examined. Esping-Andersen’s defamilialization analysis to describe the way in which welfare state policies produce less risks and burdens on the family is a good start. However, this analysis needs to go further to differentiate between carers and non-carers and what is indeed happening to care work and those who care. What kind of labor market policies and what kind of state policies are present in the welfare state that induce carers to become dependent on employment, and then in turn, what are the conditions under which carers can perform care work and employment?

The first issue has been addressed by policy makers in some countries. For example, we see the discussion of “wallet to purse” policy items in Britain, the U.K. Women’s Budget Group, and the New Labour Party. But even if policy makers know that differences in the distribution of benefits among adults in the household makes for differences in how much dependents receive in those households, welfare state researchers have not come so far as to clearly differentiate carer and non-carers as such in market and state. To address the first question in terms of how carers are treated in the welfare state and its employment-related family policy, in comparison to non-carer workers, one has to ask in what way are they treated similarly, and in what way are they treated differently. I have constructed the graph in Figure 4 (below) to illustrate this point, and to illustrate in what, more distantly, Nancy Fraser could have been interested as an ideal goal of merging the carer and the non-carer earner.

**Figure 4: Carer-commodification. A move to the middle for shared responsibilities of carers and non-carer earners?**



The middle of the line at “carer/earner” represents a universal distribution of care and employment responsibilities supported by the state and its market arrangements, i.e., a merging of the non-earner carer and the non-carer earner into one individual. Figure 4 envisions the differences between carers and non-carers in the welfare state policies but also illustrates possible movement of policy which would include reconceptualizing carers. This reconceptualizing of carers comes from both directions: 1) First of all, from the very left extreme of being primary carers with little or no involvement in the labor market, more to the middle of the graph to a carer-earner as embodied in one person. 2) Second of all, from the right side, movement toward the middle encapsulates the same expectations of the welfare state through policies which induce the standard non-carer earners to move more to the middle of the graph and take on more care-taking responsibilities. The question is, of course, whether we see an uneven movement -- a movement from one side and not the other. This would most likely be a longer movement from the left to right, but with little or no movement from right to left.

Borrowing from Esping-Andersen’s evaluation of capitalism “commodification,” I conceptualize the term *carer-commodification*. Carer-commodification describes a redistribution of care work responsibility and employment responsibility in which carers are pushed or pulled into the labor market. It also describes the way in which non-carer earners are in turn expected to exit the labor market to perform care work. Carer-commodification is the commodification or recommodification of carers. This means that a state introduces or already has in place explicit policy

that acknowledges, encourages, or expects that carers are in the labor market. Carers are required not only to care for dependents but also to support themselves and their dependents through paid employment, as a recognized societal norm. Rights and responsibilities through the state define carers as employed in the labor market.

Carer-commodification describes welfare state policies which also work with labor market policies that tie carers to the labor market, but which also provide policies that then acknowledge employees with care duties at home. Carer-commodification could work from both ends of the graph. For example, left-to-right movement of carer-commodification would induce carers to become more like earners. This can be seen in the Scandinavian countries for example, with the inability of a household to live with just one income, but the necessity for two earners to earn enough income for survival. Carer-commodification could also work from the other side where a movement from right to left occurs, for example, in the policies that induce fathers to take paternity/parental leave (see the Schleutker article in this edition of the WIP Working Paper Series).

Carer-commodification is different from defamilialization, in that it attempts to describe the inner household differences of how care is then performed in the first instance, between the carers and non-carer earners in the household. The difference between the non-carer earner and the non-earner carer can be better distinguished, and we can better understand what is happening to carers and earners via the welfare state. A second step (discussed later) describes the way in which carers are differentiated among each other: when the earner-carers are in the labor market, how then do they compare to those non-carer earners and then also how do they compare among carers? But first I concentrate on the differences among carer/earners and how they compare to the non-carer/earners. I suggest two steps involved in the calculation of carer-commodification. First of all, I look at the policies and how they actively encourage or force carers into the labor market. The second step is to look at how non-carer earners are encouraged to leave the office to care at home.

While the first step of the analysis is about the carers (how they are enter the labor market), the second step is about the non-carer earners (how these non-carer earners are encouraged to perform care work). How can one calculate these different directions of policies?

**First step:** To calculate welfare state supports of the first left-to-right movement of non-earner carers to earner/carers, one needs to examine employment-related family policies which address carers. These measures could include not only the diffusion of affordable, quality public childcare, but also the supply of care to the aged. Financial subsidies to child families, as well as family service expenditure directed toward the carer are all first step calculations that might help to understand how carers are encouraged into the labor market. These are different considerations from the way in which Esping-Andersen calculated defamilialization; carer-commodification is not interested in the way the household is unburdened from care duties, but rather how the carer can become commodified through policies. Not only are calculations such as the statistical analysis of the above welfare state measures important, but also the qualitative measures of the welfare state employment-related family policy. Here it is important to examine how specific policies are constructed for recipients.

For example, tax credits in the U. S. and the U. K. for working families illustrate the way in which the construction of policy for recipients is crucial to understanding carer-commodification. While both countries have tax credit policies, the intended effects are constructed differently. The United States pays a subsidy to working-poor households with children through the main earner. Results have shown that while single mothers increase their time in employment, this credit is likely to cause a drop in the working hours of the primary carer in a couple household. This effect was intended from the policy-makers themselves: especially in the 1989 expansion, when conservative Republicans in power were under pressure to provide more expansive state-supported childcare. A tax credit policy was able to appease those calling for more state funds for childcare, but appealed to conservative ideals of encouraging childcare to remain a private matter. All

in all, we see a push away from a universal earner/carer. The U.K., on the other hand, specifies a tax credit for members of the household which can be paid through wages or as a cash benefit directly to the carer. The benefit also includes childcare credits, and so deliberately intends in some cases to avoid the effects which occurs in the U.S.. British policy makers were conscious of tax credits effects in the U.S. which reduced the hours of employment of the primary carer. The U.K. initiated its own instruments, to give the option of paying the carer directly, and also to include childcare benefits. Also, a child tax credit has been introduced irrespective of employment status. Thus, with this example of tax credits, the British type of tax credit supports the movement in which the primary carer reaches closer to the middle of the spectrum towards a universal carer/earner while the U.S. case does not.

**Second step:** To follow the second step of examination of the non-carer earner and how movement from left to right occurs toward a more universal carer/earner -- where non-carers are *encouraged to care* -- there are several policies to be examined. First of all, an important policy to examine is the way in which earnings are negotiated and calculated in the welfare state. This also includes looking at the way in which the labor market is gendered: job segregation in which policies allow for flexibility for care work, in certain vs. all types of job sectors. The more segregated the labor market, the less likely it is that this movement of non-carers to carers is supported through state programs. Of course, the issue of wages is crucial: If there is a large discrepancy between job sectors, there is also unlikely to be much direction from the welfare state to change non-carers into carers. This second analytical step -- to examine the encouragement of non-carers to be carers -- takes not only the above labor market strategies of the welfare state, but also the specific employment-related family policies that promote men to do care work. Here again the specifics of the policies for recipients should be examined. Policies which aim at bringing fathers home to care for children during parental leave in Sweden and Finland are obvious examples of promoting those who are primarily non-carers into

care-taking roles. Other benefits, such as Germany's addition of up to three years' credit in pension calculations for time spent in caring for one's children could also be seen as a welfare state support measure in this direction.

This second example of German pension credits for care work can be argued both ways -- as an encouragement for non-earner carers to be more receptive to taking on care duties, or for tying carers more closely to the labor market. Such a policy is in effect being translated into an employment-related family policy: acknowledging care workers as also workers. But does this policy encourage the exit of carers out of the labor market, at least for the three years in which carers might be eligible for the credits? To answer this question, the researcher also has to consider what the universal carer/earner entails. Although each welfare state has the potential to come closer to a universal carer/worker, this universal carer/earner is not necessarily the same in each of the welfare states. Instead, each of the welfare states might have a culturally inclined universal carer/earner, i.e., what is culturally expected or assumed the best way to raise the children (if we are using the example of care work as the raising of children). Germany for example, might have the culturally inclined expectations that children are best cared for when they spend the first three years of their life at home. Another country such as Sweden or the U.S. might have other expectations about what is the best care for infants and children (or elderly, and so on). Whatever this cultural ideal is for care, it is a measure of the welfare state mix to what extent a universal earner/carer is promoted for these expectations.

All in all, in order to determine a carer-commodification, one analyzes the way in which care is expected to be performed by first determining the movement of policy which encourages non-earner carers or lesser-earning carers into a more central position in the labor market. As a second step, or a simultaneous step, one determines the developing policy which encourages non-carer earners or relatively less carer earners into more caring roles. Important in this exercise is the understanding of the interdependence of the paid and unpaid economies where care needs do not disappear,

but where the responsibilities of care tasks are shifted and reorganized. This has to do with the third step in analyzing family policy, as I describe below.

## **5. Third step in the analysis: carer-stratification**

Welfare state researchers are interested in the welfare state and its ability or its function to organize society: a central focus is the redistribution functions and the way in which the welfare state promotes, accounts for, and modifies pure capitalism. Esping-Andersen was interested in the way in which the state gave the ability to its citizens, not to be completely dependent on the whims of the market and completely exposed to the risks of the market's deficiencies. Esping-Andersen's citizens were, however, based on the principles of the earner-citizen. Different from an earner-citizen, those who are caring have another relationship to the labor market, as they have a different type of time and money constraints. When it comes to de-commodification, or being protected from market risks, care work needs to be included in the puzzle. The question is how this care work is organized by the welfare state and its market, in terms of how the researcher can accurately assess the welfare state. Consequently, a third step in calculating the welfare state, market, and care mix is to examine in which way care work is intended to "get done," and how care work and carers are potentially stratified in the welfare state.<sup>8</sup>

What kind of market, state, and care work mix promotes certain kinds of relationships or differences between carers in a welfare state? Welfare state intentions or policy frameworks in employment-related family policy show movement in carer-commodification, but is it all the same for all carers or is there differentiation? What is happening to the care work expectations which in effect cause inequalities among carers and carer workers? I introduce the term *carer-stratification* as I refer to state policies that ac-

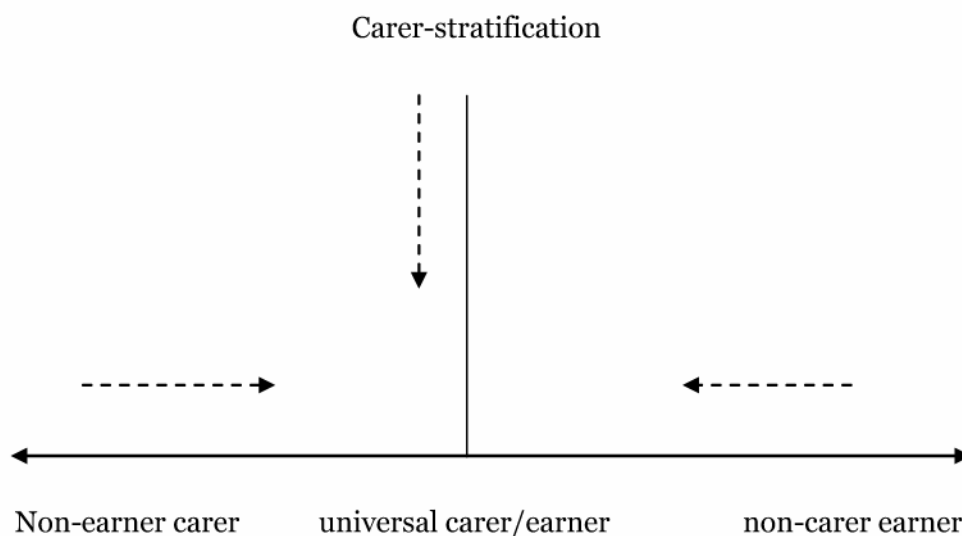
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<sup>8</sup> A further step might be an analysis of how dependents are in turn stratified.



company carer-commodification which specifically address problems that carers face through employment. Carer-stratification describes the state's rethinking of carers in employment where employees are also potential carers and explains "how" carers are commodified. Carer-stratification envisions state policies and instruments which modify the crass commodification of carers into the labor market through necessity or survival. Supports to balance the employment and care responsibilities for individuals are insured through allowances of time and money.

The idea of carer-stratification follows along the lines of Claus Offe's thesis that it is not possible for the welfare state to fully intervene in personal needs (Offe 1984: 36ff). I surmise that it would not be possible for the state (or market) to take over or replace completely what is done in household affairs or personal care. In this way, I assume that the state acknowledges there is a certain reliance of family members on other family members for care. Carer-stratification describes how a state organizes care through allowances and protections in money and time, which is also dependent on the way in which the carer has been commodified. Important again is the acknowledgment that the paid and unpaid economy are interrelated, and that care needs do not diminish, when non-earner carers enter the labor market. If carers participate more in the labor market, then a reorganization of caring services will need to fill the caring gap. This reorganization can cause a higher or lower level of stratification of carers compared to previous policies. These levels of stratification depend on the state and market provisions of care for children, elderly, and disabled.

**Figure 5: Directions toward a universal carer/earner**

The graph in Figure 5 attempts to bring together the conceptualization of three ideas: 1) policies that promote carers developing into carer/earners, 2) non-carer earners developing more into carer/earners, and 3) the way in which policy differentiates between or promotes stratification between carer/earners. This stratification element is illustrated with the vertical axis on the graph. At the top of the axis, a high differentiation between carer/earners would in effect not promote a universal carer/earner but, rather, make for different social classes of carer/earners. Below, at the base of the graph in the middle, is the ideal of a universal carer/earner. This graph represents the steps to which the welfare state researcher needs to focus on the redistribution functions and the way in which the welfare state promotes, accounts for, and modifies pure capitalism -- but with a principle standard of a carer/earner instead of a primary earner. Much more research is needed in this third step for analyzing employment-related family policy in which policies target carers differently.

A start in the analysis of how policies target carers or carer/earners differently can be located through market regulation. For example, benefits for single mothers in the U.S. are available via the mothers' activity through the labor market. Policies such as social assistance are intended to push these carers into the labor market, and tax credits are intended to insure

that their work in the low-wage sector pays better than state benefits, promoting lone mothers' additional hours of work in the labor market. Where these carers are pushed significantly harder in the direction of carer/earner (from left to right), it is possible, however, for better-off upper middle classes to survive on one income and have a carer stay at home, or the family can have a two-earner household with high quality "outsourced" care.

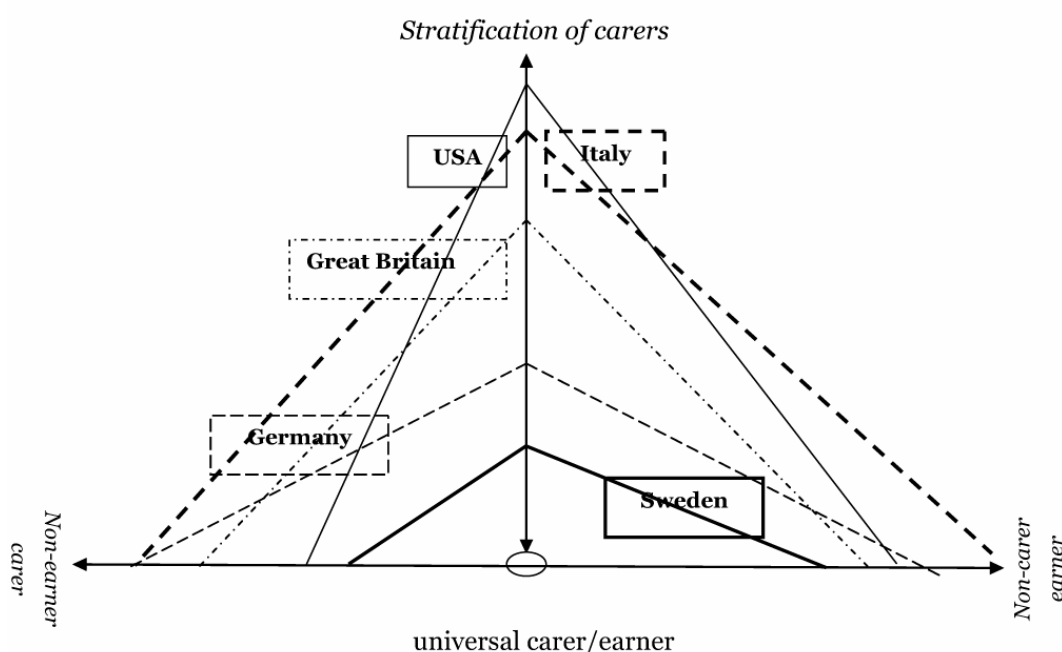
"Outsourced" care is interesting for carer-stratification in terms of whether the care is serviced and regulated by the state or whether care must be purchased through the market and/or through personal networks. Higher income and higher human capital will lead to better solutions of outsourced care while the opposite has negative effects on the outsourced care. High inequalities of care solutions within an unregulated market will result in greater carer-stratification. This situation is not irrelevant for issues such as the migration of carers from poorer countries into wealthier western welfare states, keeping market costs of care down while circumventing a similar erosion in quality.

## **6. A closer look at employment and care work constellations of welfare states**

How do the terms carer-commodification and carer-stratification translate into useful tools for analyzing care work in welfare states and family policy? In order to have an overall view of how welfare states might compare, I illustrate in Figure 6 a lens for viewing the three aspects I have discussed: movement on a continuum from the extreme of non-earner carers to a carer/earner model, the opposite movement on a continuum from the extreme of a non-carer earner towards a carer/earner model, and the stratification potential in welfare states between carers. The graph shown previously (Figure 5) illustrates where countries might find themselves in this regard. The more central a country is located nearer the axis, the closer it is to promoting a universal carer/earner. The accompanying carer-stratification accounts for support for care work but also represents differ-

entiation. Here in Figure 6 I concentrate on policy design and not the policy results *per se*. To visualize how countries might correspond to these values of carer-commodification and carer-stratification, I present a few specific examples. This display of countries is based on the their types of employment-related family policies, such as family leaves, welfare to work activation programs, tax credits, family subsidies, childcare, and so on. This is not meant to be a static picture; rather, it can be a dynamic picture as policies are introduced, changed, or eliminated.

**Figure 6: Carer-commodification and carer-stratification of welfare states**



To illustrate the ways in which I have attempted to operationalize these values of care in each country's employment-related family policy, I present in detail the U.S. and some of its individual employment-related family policies. In terms of the employment-related family policy which deal with the care of children, the U.S. has family leave, tax credits, childcare, as well as activation in social assistance. Combined values of these policies make up an average which locates the value of carer commodification and

stratification. The policy of family leave (The Family and Medical Leave Act) illustrates first a movement toward the center in terms of carer commodification but a high form of carer stratification. In terms of carer-commodification in this welfare state's parental leave policy, "sameness" trends which treat men and women similarly, as well as similar reasons for care work, show policy treatment of carers moving closer to a universal carer/earner in a movement from left to right, as well as policy treatment of non-carer earners moving from right to left and closer to the center of a universal carer/earner. The carer-stratification elements of parental leave, however, cause differentiation among the carers, in terms of the financial support offered. Because parental leave is not paid, the policy affects different carers from different social incomes and employment status. Those who are in insecure and low-income employment are less likely to be able to take up a family leave.

U.S. tax credits also offer an example for viewing carer-commodification and carer-stratification. Carer-commodification in the policy of U.S. tax credits occurs for carers when carers have more of an incentive to enter the low-income labor market, if because of tax subsidies they can support themselves and dependents through low-wage work. On the other hand, non-carer earners in the low-wage sector also have the opportunity to care, if their care work is then subsidized in the form of these tax credits. The movement of the right to left (i.e., of non-carers becoming more like carers) is not as strong, because it does not require care work; but it does make it more possible, or more attractive, to perform care work. In terms of tax credits, there are some interesting effects of the policies which might have been intended by the policy makers when designing the policy. Studies have shown that partners receiving tax credits are more likely to shift care and employment responsibilities unevenly within the family. The primary care giver is more likely to reduce employment hours in order to care. In this sense, the direction of the carer/earner is retracting toward a separation of carer and earner responsibilities for double earners in low-income households. In contrast, the lone parent carer/earners are induced

to extend their hours in employment. In this sense, there is a clear stratification between carers in partnerships and lone carer/earners.

U.S. policies such as state subsidized childcare, on the other hand, offer a picture of carer-commodification which induces very little left to right movement on the carer side toward a universal carer/earner, as well as little right-to-left movement for the non-carer earner toward a universal carer/earner. Widespread state-subsidized childcare is not available, so in terms of carer-stratification, it more difficult for low-income carer/earners to come to a universal carer/earner and balance their earner carer responsibilities, because affordable high quality childcare is market led. In addition, activation measures in the welfare to work social assistance program Temporary Aid to Needy Families promote or force carer-commodification among poor carers. But stratification is strong in this policy when it is coupled with little guarantees for childcare and care supports, and policies for better-to-do families often are intended to have different effects.<sup>9</sup>

A range of western welfare states and their family policy designs for care workers are illustrated in the Figure 6 as contrast effect. A short review of the countries and their carer-commodification and carer-stratification are as follows:

Sweden commodifies its carers to a high degree, as policies and benefits accompany the emphasis on the labor market. The labor market is highly regulated by the state, and benefits related to and in support of care work are tied to employment. The state takes the bulk of caring responsibility when women are in the labor market. In this sense, the role the state takes in care work aims to improve employment (Daly and Rake 2003: 150ff). The universal social insurance benefit of parental leave, the early education/childcare tailored to working parents, as well as the benefits and allowances, point to a strong carer-commodification, where the state expects

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<sup>9</sup> For example, the Dependent Care Tax Credit, the only equivalent of a family subsidy for care work in the U.S., benefits primarily higher-income families. According to the Green Book of the Ways and Means Committee (2004), only about 10 percent of the benefit from the credit accrues to families with AGI of less than \$20,000; about 42 percent to families with AGI between \$20,000 and \$50,000; and about 48 percent to families with AGI above \$50,000.

individuals to work in the labor market. The state provides supports as an instrument to outweigh problems which might cause carers to be disadvantaged in the labor market as well as general supports for children (Clearinghouse 2004). These state supports and emphasis on solidarity leave a minimum of stratification between carers. However, job segregation still emphasizes differences between the primary carer who earns, and the primary earner who might also care. Recent paternity policies have emphasized an interest to change this.

While Sweden and the U.S., in terms of carer-commodification on the right of the graph, are closer in their expectations of carers entering the labor market as carer-earners (although the U.S. is much different in its stratification intentions), some other welfare states such as Germany and Italy have relatively little movement in carer-commodification on the carer side, although this also has been changing in recent years. While these two states have similarly low levels of a push of carers into the labor market, Italy intervenes only minimally with little redistribution in terms of family support programs, where carers are to rely on extended family members for resources but not set up their own autonomous households (Ruspini 1998). An extensive mandatory maternity leave insures an extensive exit from the labor market for five months for mothers. Parental leaves are benefits replaced at about 30 percent of wages, and family allowances are means-tested and are among the lowest in Europe (Clearinghouse 2004) which allows for little carer supports. New allowances for families with more than three children regardless of employment might actually discourage employment among carers. The quality of the policies is low for carer-commodification, in that there is no push of carers into the market. In terms of income support, Italy has only recently supported a means-tested guaranteed income. Stratification between carers and differences among carers and earners are some of the highest of any other welfare states.

Germany, on the other hand, has carer-commodification for carers of young children, but has systems of supports for carers indirectly through family earners' wages. There are relatively high state supports for carers if

they are not in the workforce in comparison to Italy's little state support. Carers in Germany are thought to be in a three-stage life cycle if they enter employment. The first phase includes education and training with some years in the labor market; in the second, when children are born the mothers exit the labor market to care for them (at least until the youngest child is three). The third phase might then entail only part-time work, either to continue raising older children or even to assume responsibility for aging parents. This intense caring time when the children are small is supported through the welfare system with social assistance for low-income people, and *Erziehungsgeld* (or support for raising children) for both middle and low income carers. Child benefits are also available from the state for all parents. In the past, carers have not been encouraged or recognized as full-time employees in the labor market, and to some degree the state compensates lost resources through family programs with support through social assistance and targeted benefits. These measures are changing: with the new government, the welfare state has developed policies which might encourage more carers into the workforce, but stratification of carers seems to be more likely.

The U.K., for example, has moved towards carer-commodification in policies such as the New Deal for Lone Parents, but has also developed accompanying state supports for carer-commodification where, for example, the Working Tax Credit including childcare tax credits improves the choice factor of many employed carers. Childcare has been expanded and parental leaves have also been strengthened and improved for parents (Woods 2004). There is interest in bringing carers into the labor market, and with a booming economy the state has also been able to introduce measures which could minimize differences between carers or carer/earners. While flexibility in work time and paternity rights has been incrementally introduced, a movement in policy from a non-carer earner focus toward a universal carer/earner ideal has been not so strong.

Figure 6 is not meant to freeze the countries into high/low carer-commodification and stratification. Instead, the graph represents a way to speculate about how carer-commodification and carer-stratification might



be applied to welfare states and to present an overall picture of the situation of care work and carers with respect to employment and family policy change. As the individual policies are modified in their respective countries, shifts in the overall carer-commodification and carer-stratification values will occur. Indeed, in present times, these shifts have been more apparent towards carer-commodification, especially for primary carers. Many welfare states have shifted more to the right of the axis than they might have been before. But, while countries might be moving horizontally in terms of the commodification of carers, questions remain as to 1) what sort of horizontal carer-commodification is occurring for non-carer earners, and 2) what values are welfare states producing on the vertical position of stratification. These carer supports and restructuring are what the welfare states are attempting to negotiate in their new orientations.<sup>10</sup> The above illustrations are meant as a guide to evaluate movement in policy -- not just of carers into the labor market, which has had the most public attention -- but also the movement of policy which advocates pulling non-carers into care work and stratifying the remaining care work.

## 7. Conclusion and outlook

This paper attempts to consider and to place care work in a more central place in the analysis of family policy and the welfare state in order to evaluate modern developing inequalities and capture welfare state change. I propose a conceptualization of employment-related family policies that focuses on a country's handling of carers and care work: how much the welfare state pushes carers into or expects carers to be in the labor market (carer-commodification) and how much the welfare state accounts for the care work through supports while commodified (carer-stratification), or supports through not being commodified. My proposed thought experiment applies care work as a central tool of analysis. Such an evaluation

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<sup>10</sup> It is also important not to forget that the welfare state might also prioritize some care work over other care work. For example, care work for children might be more readily provided by the state than other care work, such as that for elderly people.

makes change more apparent in the welfare state with regards to family policy: as the policies might move up or down, or left or right on the graph, there is a locus of change or radical change.

With categories of carer-commodification and carer-stratification, it is easier to get an idea of where a welfare state might be heading in terms of redistributing care work and employment through its policies. The terms not only illustrate expectations for employment standards for carers but also how states support/do not support the care work in itself or alongside employment. In the movement of women entering the workforce, as supported in European Union directives, the reorganization of care work is inevitable for many European welfare states. Welfare states are at a turning point in establishing policies, but the question remains: How much of a change do these policies represent? My introduction of the concepts of carer-commodification and carer-stratification is an attempt to use a new lens to view this phenomenon with respect to employment and care work.

The terms carer-commodification and carer-stratification, used together, are better terms than defamilialization, I argue, because they can more accurately focus on care work and the situation of carers and carer/earners. Very much in the way that Esping-Andersen took up the term “commodification” and “decommodification” to describe unwittingly, but specifically, the situation of male employees, I have gone a step further, adopting the terms “carer-commodification” and “carer-stratification” to address carers in employment: first how carers compare to non-carer earners, and second, how carer-earners are treated differently or intended to have different outcomes in the policy.

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