

Chapter 1

Gender and Social Policy in a Global Context: Uncovering the Gendered Structure of ‘the Social’

Shireen Hassim and Shahra Razavi*

The past decade has witnessed a renewed interest in social policies, and some governments have increased social spending to soften the impacts of economic reform. These changes have come in the wake of widespread realization of the failure of the neoliberal economic model to generate economic growth and dynamism, and to reduce poverty. At the same time, processes of political liberalization have opened spaces for social movements in many parts of the developing world to articulate demands for more effective social policies that mitigate the effects of market failures and reduce inequalities.

These contestations have coincided with a rediscovery of ‘the social’ in the policy oriented literature, widely understood to embrace the cluster of social and political institutions, norms, and relationships that define the boundaries of market exchange, reduce transaction costs and enhance social and political stability. Polanyi’s (1957) seminal work that showed the market to be a political and social construct is widely

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cited today to explain the failure of the structural adjustment packages that narrowly focused on ‘getting the prices right’, and to redirect attention to the institutional underpinnings necessary for successful market capitalism (Ruggie 2003).ⁱ However despite the movement away from the standard neoliberal approach of the 1980s, and the increasing recognition given to institutions and the state, there is little agreement on a number of critical issues. These include the scope of social policy and the appropriate interface between social policy and macroeconomic policy (Elson 2004; Mkandawire 2004; Tandler 2004); the role of the state, not just as ‘regulator’ but also as a provider of social welfare; and the values underpinning public policy, in particular core values of equality (and redistribution) which seem to have been displaced by the discourse on poverty (Phillips 2001).

A gender perspective on social policies in the South, as in the North until quite recently, has remained on the margins of these debates. This volume is an attempt to move the gender analytical framework closer to the centre of social policy thinking. From their different regional perspectives, the chapters in the volume map out the complex ways in which social policies are filtered through social institutions—families and communities; markets; care arrangements; health and education systems; the public sector—that are ‘bearers of gender’. Moreover attention to gender reveals the extent to which inequalities (of class, gender and region) are being intensified as a consequence of shifts in the global economy, and processes of privatization and commercialization taking place within countries. Women’s unpaid care work continues to form the bedrock on which social protection is subsidised, with erosions in state provisioning impacting most strongly on women. Despite women’s increasing participation in paid work, labour markets continue to reproduce gender-

based segmentations and inequalities in wages/income, work-related social benefits, and social security. As this book demonstrates, social institutions are by no means homogeneous: economic, institutional and cultural variations across countries and regions shape the nature of both risks faced and forms of social protection available for women.

In this chapter, we root a theorization of gender and social policy in three key, inter-related arenas: the nature of labour markets, the institutional basis for social policy formulation (families, communities, markets and states) and the nature of political contestation around social policy. In the first section, we lay out the gendered nature of economic transformations in the late twentieth century, drawing out the implications for gender equality of shifts in the nature of labour markets and the relationships between paid and unpaid work. In the following section, we link these changes in the structure of labour markets to a discussion of the impacts of social sector restructuring. Here we examine the gender implications of commercialization and privatization of social services and income supports as well as the policy turn to targeting and social insurance as a response to the exclusionary effects of markets. The third section explores the institutional basis for social policy formulation, examining more closely the assumptions about gender roles and entitlements, especially in the key institutions of family and community and how they interface with the state. The relationship between political democratization and the development of gender equitable social policy is then examined. We are particularly concerned with the issue of women's agency in relation to advocating for social policy change in ways that meet their various needs.

To facilitate our discussion of the chapters, Charts 1.1 through 1.7 capture some of the standard indicators of relative (or absolute) female status for the countries included in this volume, ranked by per capita GDP (USD PPP adjusted). These include indicators of educational status (gross enrollment rates at the primary, secondary and tertiary levels, and adult literacy rates), health status (maternal mortality rates), political status (percentage of parliamentary seats held by women), and economic status (economic activity rates). While enrollment rates in primary education provide a generally more egalitarian picture (India being an exception), inequality sets in at the secondary level especially for some (though not all) low income countries. Gross enrollment rates at the tertiary level provide a more complex picture with gender gaps being in favour of males in some countries (Japan, South Korea, Chile, Mexico, India, Bolivia, Tanzania), and in favour of females in others (Sweden, Argentina, Poland, Iran, Jamaica), cutting across income groups. Chart 1.5 captures maternal mortality, which seems to be more sensitive to income levels, although again there is great diversity between countries reflecting differences in health systems and the accessibility of health care (with Argentina and South Africa doing particularly badly for their income level). Chart 1.6 captures women's relative access to parliamentary seats, which seem to bear little relation to income levels, with Sweden and South Africa being the two front-runners. Gender gaps in economic activity rates are shown in Chart 1.7, with Sweden and Tanzania at the two ends of the income spectrum displaying the narrowest gender gaps, while the widest gaps appear in Iran, India and Mexico with income levels that are much higher than Tanzania's.

The Economy as a Gendered Construction: Labour and Care

We make two central arguments in this section. First, we note that historically a major preoccupation of social policy has been to respond to labour market risks (such as unemployment, old age, maternity) through transfer payments conditional on previous employment.ⁱⁱ However, women's access to paid work does not easily translate into their enjoyment of social protection mechanisms that flow from paid employment. Gender-blind analysis of social policy has tended to underestimate the extent to which labour markets are themselves gendered (for example, sex-segregation of jobs, differential pay, gendered definitions of 'skill'), features which in turn shape and constrain women's access to such benefits. Furthermore, the gender-segmented features of the labour market have been exacerbated by liberalization policies that have weakened the link between paid work and entitlements to social protection and provisioning. Second, for gender analysts a central feature of women's entry into paid work is the tension that this produces with regard to their responsibilities to provide unpaid care. How these tensions are experienced and understood diverge substantially across contexts, and shape the particular balance of responsibilities between markets, states, families and communities.

Paid labour and social protection: the historical legacy

Welfare state development in all its regional variations has been marked by numerous inequalities and exclusions (of gender and race). This is evident not only in Europe and North America, but also in many developing countries, where for various reasons the construction of effective and inclusive welfare systems proved difficult. In the

advanced industrialized countries of Western Europe, the post-war social contract between capital and labour underpinning state social regulation and provisioning was based on dominant normative assumptions about gender difference, with breadwinning prescribed for men and caring/homemaking for women. Many women of course were in the labour force, sometimes continuously, but they tended to occupy the less protected niches as secondary workers with limited access to social insurance benefits. Hence, for many women who spent large parts of their lives outside the paid workforce, and even for those who worked on an irregular basis, access to a pension or health insurance became possible through their relations with a fully employed husband or father, as a *derived* rather than individual entitlement.

Given this pattern, feminists have used the extent of women's integration into the paid labour market as a mechanism to distinguish between different welfare states. At one end of the spectrum, Sweden demonstrated the most (although not completely) egalitarian form of welfare state, and was inclined to a 'weak male breadwinner' or 'dual breadwinner' model (Lewis 1992).ⁱⁱⁱ A formal emphasis on egalitarianism also underpinned state socialism, which shared the Swedish model's aim of getting women, like men, into the work force but without the democratic political institutions of the Swedish state. In the state socialist countries, state policy and rhetoric, at least initially, celebrated women's liberation by defying bourgeois models of the family and of femininity, by encouraging women's presence in continuous full-time employment, and by taking public responsibility for the provision of childcare. Gender equality was modelled on a male norm of paid work, and labour force entry was the route through which many women accessed a wide array of social benefits and services. These egalitarian impulses notwithstanding, gender inequalities in

wages and labour market status (though far less accentuated than in Western Europe) along with the burden of unpaid work in a shortage economy, remained a palpable part of the legacy of state socialism for many women in the region. A good portion of care work continued to be carried out within the family and by women, while parental leave schemes were made available to women; only under exceptional circumstances could fathers qualify for such leave.

Many developing countries, by contrast, have been characterized by weak state institutions, partially commodified economies, low levels of formal waged labour and a weak fiscal base. The colonial legacy, though experienced very differently, left many countries with deepened social cleavages and lop-sided economic structures that post-colonial governments had a hard time shaking off. The colonial impact was particularly devastating in the 'enclave' economies of southern Africa, such as Zambia, where race, gender and location intersected to create highly differentiated rights of access to state social provisioning. Most of the population was excluded from welfare on the grounds of their rurality and reliance on subsistence production (Mhone 2004). The combination of the pattern of male labour migration and colonial policy to keep women out of urban areas intensified women's responsibility for household reproduction and care in the subsistence-based rural economies (Tsikata 2004). They tended to occupy the most tenuous links with the urban economy and any social benefits that came from it. After independence state provision of important social services like health, housing and education retained a bias towards the more developed urban areas, despite stated intentions to make development broad-based.

Where the developmental state was successful in forging strong national industries, namely in parts of northeast Asia such as South Korea and Japan, both the industrial structure and welfare provision remained stratified, with a dual labour market structure that overwhelmingly privileged male workers in core industries. The sectoral distribution of women's employment, the size of the firms in which they were employed, the occupations in which they were clustered and the nature of their contracts combined to ensure that both the direct benefits of employment and access to social welfare insurance were less advantageous for them. For example corporate social welfare—which was an important source of welfare in South Korea prior to the 1997 crisis—was far more generous in the large firms, whereas the bulk of women workers were concentrated in small- and medium-sized firms that could ill-afford the same level of benefits (Cho et al. 2004).

In the case of Latin America, from the late nineteenth century some forms of social protection and provisioning developed, even if to varying degrees, to create the embryos of the future 'social state' in countries such as Argentina and Uruguay (Filgueira forthcoming). These efforts were mainly concerned with the provision of public health and primary education often as a means to 'discipline and homogenize' (p.5) the rural migrants and the European immigrants, while social insurance was made available to privileged (and largely male) sectors of the labour and armed forces. Such efforts were reinforced in the 1930s as corporatist arrangements were put in place in countries like Argentina, Brazil and Mexico, in the aftermath of the 1929 crisis, and established more securely in the post war period. This resulted in some expansion in entitlements, notably for organized labour (Molyneux this volume). Social provisioning was expanded in the 1960s and 1970s so that by 1980 human

development indicators in Latin America were on a par with those of East Asia (ibid). However, the coverage that the social state provided in Latin America varied enormously: social exclusion was far more extensive in Central America, for example, while the southern cone countries tended towards a more universalistic, even if highly stratified, model (Filgueira and Filgueira 2002).

In short, in deeply hierarchical and segmented societies, where some crucial forms of social protection were linked to formal employment and where the latter never included more than a small fraction of the population, vast sections of the population, including the majority of women, were frequently excluded from coverage. Yet it would be wrong to assume that women were absent from state social provisioning and protection altogether. Not only did women make up a significant proportion of social security beneficiaries as wives and daughters ('dependents' in the language of social insurance) of male breadwinners, they were also direct beneficiaries of some public services (health, education) as well as being targets of so-called *maternalist* programmes aimed at mothers and their children (Molyneux this volume). Women have also traditionally constituted a significant share of state employees in the social sectors, as teachers, nurses and carers.

Labour market informalization: The demise of the 'male breadwinner' model?

The small size of the formal economy in most developing countries meant that job security and work-related benefits remained privileges available to a relatively thin stratum of workers, predominantly men. While these benefits could have been extended over time to other sectors of the population (as in many successful welfare

states, and more recently in South Korea), since the early 1980s there has been a global trend in the opposite direction. Paid work is becoming increasingly informal and casual as workers have lost their work-related social benefits, although the extent of convergence between patterns in North and South should not be exaggerated.

In Latin America in the 1980s and 1990s eight out of every ten new jobs created were in the informal sector, while the 1999 manufacturing wage was only three per cent higher than its 1980 level (Tokman 2002). Even in Costa Rica—the country that has one of the strongest social states in the region—informal employment accounts for nearly half of all employment (Heintz 2005). Those who work in the informal economy are not covered by labour legislation for social protection and earn less, on average, than those in the formal economy (ILO 2002).

Processes of labour informalization and casualization have been largely driven by corporate interests, increasingly unhindered in their global search for ‘appropriate’ forms of labour, while trade unions have been weakened and sidelined and, with few exceptions, unwilling to take informal workers on board. Hence, employers are no longer forced to take responsibility for the social wage. In many developing countries labour ‘flexibility’ was further imposed as a policy condition for debt relief (via stabilization and structural adjustment programmes), on the ground that labour markets were too rigid. This process of casualization has coincided with another momentous change—the increasing feminization of the work force.

Gender and labour markets: Continuity and change

With some striking exceptions (East and Central Europe and Central Asia), the last twenty years have seen a surge in women's labour force participation worldwide, with women's activity rates nearing men's in some countries. The forces propelling women into the work force are complex and diverse. In the OECD countries, the trend of going to work is most noticeable among mothers with young children – the group that was most likely to drop out of employment in the post-second world war period (Orloff 2002). However, workforce participation rates are crude indicators of working women's situations. Women in these countries, for example, tend to work on a part-time basis far more frequently than men (ibid). While taking on part-time work may involve an element of real choice in some cases, for others it may be 'involuntary', either because of the lack of full-time employment options and/or the need to accommodate care in the absence of other viable sources for its provision.

Feminists have been particularly interested in Nordic social democracies that appear to have achieved relatively high levels of gender equality through female labour force participation and the redistributive mechanisms of social policy. Sweden, for example, has been able to forge what Hobson (this volume) calls 'participation parity' in the labour market with nearly equal numbers of women and men in the work force. Yet this achievement masks the manner in which gender inequalities have been reinscribed in new ways. For example, a significant portion of women – over a third – are working part time^{iv} and more than ninety percent of all part-time workers in Sweden are women. As Hobson argues, the Swedish model is thus in practice a 'one and three-quarters' model: men work full time and invest in their careers, while women work part time in the public sector, where it is easier to combine employment with having a family. Even though parental leave schemes and 'daddy leave' quotas

were designed to be gender-neutral, the outcomes are not. Throughout the 1990s, between ten and 12 per cent of parental leave days were taken by fathers. In 2005 men's share rose to 17 per cent—still a far cry from the equal participation of men in unpaid work. As Lewis and Giullari (this volume) remind us, although the balance of contributions women and men make to households in the form of cash and care is changing it remains gendered. In most countries, women have added paid work to their existing responsibilities for care, while men have decreased the amount of paid work they do and increased their carework only slightly (see Table 1.1 for selected OECD countries).

Table 1.1 here

Recent research finds that despite some improvements in the 1990s, levels of gender segmentation in the labour market remain high throughout the world (Anker et al., 2003). Women tend to congregate in relatively low-paid and low-status work at the bottom of the occupational hierarchy, and also to have little job security. Gender segmentations in labour markets are more difficult to capture in developing countries with pervasive agrarian and informal sectors, which are not sufficiently covered in most large-scale statistical surveys.

For many developing countries increasing poverty and the commodification of the economy are changing the coping strategies of households and communities in a multitude of ways, causing upheavals in gender and generational patterns of work and responsibility. Research from sub-Saharan Africa, for example, shows that in the context of economic crisis and reform, it is becoming increasingly necessary for all

household members—whether female or male, young or old—to take on paid work (Bryceson 1999). Much of this tends to be badly remunerated, with women being overwhelmingly clustered in low-entry, low-return type activities (Whitehead 2004).

Chart 1.8 here

According to the ILO (2002) informal employment^v comprises between one half and three-quarters of non-agricultural employment in developing countries. But there are also important stratifications within the informal economy, based on productivity and income as well as gender. The informal economy tends to be a larger source of employment for women than for men in most countries (ILO 2002); Chart 1.8 based on a recent six country study shows strongly gendered patterns of employment in the formal and informal economy (with the exception of El Salvador where male and female rates are comparable). Women informal workers tend to be over-represented in the more precarious and less remunerative segments of informal work: they are more likely to work as own-account workers, domestic workers, and unpaid contributing workers in family enterprises than are men, while men are more likely to work as employers and wage workers (ILO 2002). This is confirmed by Beneria and Floro's evidence from Bolivia and Ecuador where women tend to have relatively more precarious jobs than men. Furthermore, as time allocation studies show, while informal work, especially homebased work, may enable women to combine paid and unpaid work (such as sewing garments on a piece rate basis while looking over children and doing house work), it entails an intensification of work which can seriously affect women's well-being (references cited in Beneria and Floro).

It is very difficult to find gender-disaggregated data on income and poverty. The reliance on poverty lines and household expenditure data has profound implications for how gender issues are analysed. Measuring poverty on the basis of household expenditure data effectively ignores the long-standing feminist concerns about intra-household distribution, and it is very rare to find standard surveys embarking on a quantitative exploration of intra-household poverty (Razavi 1999, Whitehead and Lockwood 1999). Hence, evidence from smaller surveys on men's and women's wages and earnings can be very useful to fill this lacuna. Table 1.2 and Chart 1.9 which draw on the above-mentioned study, confirm that women's hourly earnings typically fall below those of men in identical employment categories; the gender gap in earnings is particularly pronounced among own-account workers while it is narrowest in public wage employment.

Table 1.2 and Chart 1.9 here

The broad conclusion that one can draw from some of the available data is that despite the convergence in men's and women's crude economic activity rates and the erosion of the male breadwinner model, gender segmentation is not disappearing from the world of work. It is surprisingly robust, and places serious limits on women's access to income. It also has important implications for social policy – making women's access to social protection mechanisms and social services more constrained if these are provided on a commercial basis or on the basis of employment-related contributions, as in the social insurance model. In theory it is possible to extend the coverage of social insurance programmes to include informal workers. Lund's chapter shows that this is happening in a number of countries, including Costa Rica, but only

if their contributions are heavily subsidised by the state. In the following section we examine the contours of social sector restructuring in the 1980s and 1990s and the implications for women's access to social services and transfers.

Gender and Social Sector Restructuring

There have been tremendous changes in the development policy mindset with regard to the role of the social sectors in the last two decades. In this section we address the implications of these shifts for the development of gender-equitable social policies.

By the late 1980s it became increasingly evident that the poverty and social disruptions caused by stabilization and adjustment were not the 'transitional phenomena' or 'frictional difficulties' the international financial institutions (IFIs) had initially assumed; they were pervasive, long-term and systemic. Studies of the impacts of adjustment, and popular opposition to key adjustment-related measures combined to bring into question dominant policy prescriptions. Global policy pronouncements became less assertive about the imperative of cutting social spending, more apologetic about the imposition of 'user fees', and began to acknowledge that social policy could have a vital role to play in the development process.

In the early 1990s the World Bank grudgingly accepted that adjustment packages had paid too little attention to social privations and that in view of empirical studies documenting the economic and social pay-offs from investments in health and education it would be wise to prevent the 'depreciation of human capital' during the

adjustment process. Despite this shift, the dominant view was that ‘fiscal restraint’ had to be strictly observed. The dilemma of how to respond to social needs while remaining within the constraints of macroeconomic stabilization was resolved by attempting to ‘target’ social expenditures to populations most in need (Vivian 1995). Certain expenditures were thereby re-allocated, for example from secondary to primary education; and supplementary programmes, ‘safety nets’ and ‘emergency funds’ were developed for the poor.

A consensus seemed to be emerging on the importance of social provision and social protection, especially in a globalized economy where vulnerabilities were accentuated due to exposure to external risks. That this was not merely a rhetorical shift becomes apparent from the increasing share of Official Development Assistance (ODA) going to the social sectors (UNRISD 2005: Figure 8.1). Moreover, in several countries, levels of public social spending were restored in response to popular pressure and discontent (UNRISD 2005: Table 3.3). At the same time, the state’s role in the development process as well as in ensuring effective governance was increasingly recognized (World Bank 1997). But what precisely was the scope for state action in the realm of social development and welfare policy? And how was it to triangulate with the institutions of the market, family and civil society?

The 1997 Asian financial crisis prompted the G7 to request the World Bank to formulate ‘social principles’ and ‘good practice of social policy’ as a guide to policy makers worldwide. The new emphasis was reflected in the World Bank’s 2000/2001 World Development Report (*Attacking Poverty*), which identified ‘social risk management’ (SRM) as the most sustainable basis for coping with risk and reducing

the vulnerability of the poor. In this framework, the state was expected to provide ‘risk management instruments where the private sector fails’ in addition to ‘social safety nets’ for risk coping for the most vulnerable (Holzmann and Jorgensen 2000: 18)—displaying continuities with the earlier generation of minimal safety nets. As we will see later, the family and the community were seen as central institutions in SRM, working in tandem with the market.

The welfare pluralist approach was adopted in a context in which the provision of social services and social protection was being rapidly commercialized. Selectivity in social policy thus went hand-in-hand with a trend towards multi-tierism in modes of provision in several important areas—pensions in particular, but also healthcare and education. While selectivity means narrowing the targets for support, multi-tierism means reducing the state component and partially privatizing social protection.

Market-based, individualised entitlements (such as private pensions and health insurance) are thus seen as appropriate for those who can afford them, while scarce public resources are to be channeled or ‘targeted’ to the poor in the form of elusive safety nets and ‘basic’ public health and education services.

Hence, behind the apparent consensus about the importance of social policy lurks the ‘traditional great divide in social policy debates’ (GASSP 2005) between the so-called universal redistributive model with an emphasis on universal access to social services and a focus on equity and redistribution, and the residual approach which ‘sees social policies as a residual measure to address the plight of the poorest and most vulnerable’ (p.3). The ascendance of the latter approach was at least partly related to the particular policy emphasis on poverty alleviation in the 1990s, now in full bloom

with the Millennium Development Goals (MDG), which sought to ensure that public resources were geared towards only the poorest (GASSP 2005). By contrast with developed countries, the elaboration of social assistance and social security in developing countries has thus been rooted in the new global discourse of poverty, which has in turn fed into and reinforced a bifurcated view of social policy (markets for those who can afford them and ‘safety nets’ for the poorest). Below we consider the key building blocks of the currently dominant model of social policy—commercialization, targeting, and the new discourse of welfare developmentalism—from a gender perspective.

Commercialization and familialization of welfare

Social sector reforms (health, education, pensions) have, among other things, entrenched the commodification of public services through the imposition of ‘user fees’ and other charges, enhanced the role of the private for-profit sector in the provision of social protection and services (sometimes through the privatisation of what were previously state/public services), and shifted some of the unmet need for welfare onto families (re-familialization). Adopting Mackintosh and Koivusalo’s (forthcoming) usage, we understand the concept of commercialisation to be ‘wider than the “private sector” of provision and finance, encompassing for example commercial behaviour by publicly owned bodies ... and broader than “privatization”, which refers to the sale or transfer of state-owned assets into private hands’ (p.2).

In many low-income countries health care commercialization has been a key area of public concern and the model of reform promoted by the IFIs, widely referred to as

Health Sector Reform (HSR), has entrenched the shift toward greater commodification of public services. In Sub-Saharan Africa, as Mackintosh and Tibandebage (this volume) show, HSR has been promoted in a context of severe poverty and in the wake of economic crisis. In Tanzania, for example, user fees were introduced in the early 1990s at a time when cuts in government spending and removal of subsidies on basic goods were disproportionately affecting the poor. In a context where a significant proportion of the population cannot afford its basic needs, the imposition of fees for health care has been impoverishing.

The currently dominant model of health service provision has particularly problematic implications for women—as users of health services, as health service workers, and as providers of informal care. As Mackintosh and Tibandebage show, HSR in Africa seems to be based on unrealistic assumptions about poor women’s ability to muster the economic resources needed to access services for themselves and their dependents, about their unlimited time and capacity to provide unpaid care when formal care remains out of reach, as well as problematic assumptions about the interests of health care workers and clients (for example, seeing them as antagonistic).

A common policy response to the exclusionary effects of ‘user fees’ has been the promotion of mutual health insurance schemes as well as social insurance schemes. Unlike social insurance schemes which are employment based, mutual health insurance (MHI) schemes are voluntary schemes to promote the inclusion of the poor and vulnerable by pooling their risks and providing exemptions for those unable to pay. However most community based MHI schemes face the problem of low participation rates and lack of financial sustainability; in Tanzania, for example, many

rural Community Health Fund (CHF) schemes have not been able to extend their participation rates beyond ten per cent of eligible households (Tibandebage 2004). Inability to pay constitutes one of the main reasons for non-enrolment, which is likely to affect women more severely given that they are more cash constrained than men, and are likely to have more health needs. It is also not clear how such schemes can provide exemptions for the poor and ensure financial sustainability in the absence of significant subsidies from the state—given the difficulties of having cross-subsidies from the better off in small-scale voluntary schemes.

Enrolment in social insurance programmes is very often employment based, with mandatory affiliation. In the case of developing countries, coverage has tended to be limited due the large size of the informal economy, and the high rate of evasion of contributions, even by employers and employees in the formal sector (Huber 2000). For these reasons even though social insurance schemes facilitate resource mobilization via contributions, they may not be the most effective vehicle for extending coverage to the majority of the population, particularly women who, as we showed in the previous section, tend to be informally employed. But in some countries efforts are being made to extend social protection mechanisms to formerly excluded categories of workers (Lund this volume). The full implementation of these schemes, however, remains a challenge given the administrative difficulties of reaching dispersed workers with erratic incomes, monitoring the implementation of their new rights, and making their membership financially sustainable.

The health insurance scheme built by SEWA (Self Employed Women's Association) in India, discussed in Lund's chapter, is an example of an employment based scheme

that is successful in reaching women informal workers; this is done through an integrated insurance scheme which also offers life and asset insurance. The reasons for its success include exceptionally strong leadership, top-flight expertise from insurance experts, a willingness to respond to members' needs, and set realistic rates, as well as the fact that it has been built on existing patterns of solidarity of SEWA as a trade union and as a set of cooperatives for women with strong organizational capacities. Replicating such conditions will not be easy.

Health sector reform in China, discussed in Jufen's chapter in this volume, is taking place alongside a fundamental restructuring of the labour force marked by massive unemployment in the state industrial sector and large-scale migration of the rural work force into global factories. This stands in marked contrast to the 'full-employment' scenario of pre-reform China when industry was exclusively in state hands and welfare was provided through the enterprise. To be sure, gender segmentations in the workforce often translated into stratified rights to welfare in the pre-reform era: men greatly outnumbered women as permanent state workers and also predominated in senior grades, while collectives constituted a feminized sector (Lee 2005). But the proposed schemes for health insurance do little to reduce gender segmentations, and are in fact likely to exacerbate gender based and other forms of exclusion.

The 'basic health insurance scheme for urban workers', which is the principal component of China's health insurance scheme for the urban population, covers those who are in the formal work force and have permanent residence permits, thereby leading to the exclusion of informal workers, migrant labourers and those who are not

part of the workforce. These exclusions are exacerbated by the schemes highly individualistic design which does not even provide coverage for the ‘dependents’ of the insured. Furthermore, as Jufen’s contribution to this volume clearly shows, a social insurance model with gender-neutral design and individualized accounts is likely to produce very unequal outcomes for men and women in terms of access to benefits (relative to need) when it is filtered through structural inequalities, especially inequalities in wages/income and years of employment. If coverage in social insurance programmes remains employment-based and individualised with little subsidy from the state, then women’s labour market disadvantages are likely to feed into their weaker claims on health care.

In the education sector the logic of ‘targeting’ promulgated at the international level has prioritised primary education, where the ‘rate of return’ is presumed to be higher and where public expenditure is considered to be pro-poor. In countries such as India, discussed in Jha and Subrahmanian’s chapter, this logic seems to have led to a significant re-allocation of public social expenditure from higher education to primary education. While this redistribution and the accompanying reforms in Indian education have been vital for rapidly boosting India’s abysmal education enrolment rates, it has also led to the unfortunate neglect of secondary education. The systemic inter-connections between different parts of the education system have been ignored: the availability of post-primary education, for example, can strengthen the pipeline that channels students through the education system by giving parents an incentive to send their children to primary school and by providing the next cohort of teachers. Moreover, many of the benefits that girls and women reap from education—access to employment, access to contraception, ability to negotiate intra-household relations—

materialize at the post-primary level (UN Millennium Project Task Force on Gender Equality 2005: Chapter 3).

The reallocation of funds has been facilitated by donors' financial support for new investments in primary education, which require 'counterpart' government funding. The concentration of public funds at the primary level has in turn facilitated an expanding role for commercial provision at the secondary level. This raises questions about affordability and access for both boys and girls from less privileged backgrounds. It poses particular problems for girls in a cultural context where parents prioritize their sons' education, especially when the direct costs of schooling are high relative to household income.

Such mechanisms seem to have been at work in the Indian state of Uttar Pradesh, where state directives and infrastructure grants for the provision of private single-sex secondary schools for girls have been subverted at the local level, as schools benefiting from such grants were not able to recruit enough girls to make their enterprises profitable. While the larger concern for girls' education at the national and international levels made it a good political decision to have schemes to improve the provisioning of girls' schools, narrow political and electoral considerations at the local level subverted the very basis of allowing subsidy for a private enterprise. As Jha and Subrahmanian conclude, 'In an environment where girls' education is not a highly valued choice, increased privatization [*commercialization*] is bound to act against their schooling participation'. In particular, the role of the state in mobilizing demand and influencing change in the domestic calculus that leads families to under-

invest in adolescent girls' schooling is under appreciated where commercialization is seen as the dominant policy choice.

An important set of reforms that swept through many middle income countries over the past decade has been the reform of public pension programmes, where multilateral financial agencies and private commercial interests were strongly represented, in addition to technocratic elites and domestic constituencies such as trade unions and political parties. The outcomes have been diverse, and in some countries domestic political coalitions were able to resist the privatization model being imposed by the IFIs. While gender concerns do not seem to have surfaced in the public debates on pension reform, the moves towards privatisation have major implications for women with typically lower labour market capabilities. The fact that benefit levels in privatised and individualised systems correspond closely to the overall contributions made by the insured person, means that women with their typically lower wages and fewer years of employment are likely to gain lower benefits (Huber and Stephens 2000b). The fact that fully privatised systems also take into account life expectancy further works against women although this is typically partially mitigated by allowing women to draw a pension at an earlier age than men. In public systems women's disadvantages are often mitigated by generous minimum pensions, by the fact that life expectancy is not taken into account, and that credit is sometimes given for periods of full time care.

Targeting versus universalism: Is it gender-coded?

Although social policy regimes are hardly ever purely universal (providing benefits to the entire population as a basic right) or purely based on targeting (providing benefits to selected members of the population, usually on the basis of their ‘neediness’), they tend to lie somewhere between the two poles along a continuum and often in hybrid forms (Mkandawire 2005). As we noted earlier, targeting has become particularly attractive in the context of tight fiscal policies and aid dependence. In such contexts the relationship between social provisioning and the political economy of resource mobilization tends to be weakened; indeed targeting concentrates on the problem of disbursing given external resources, and not on that of generating and disbursing domestic resources through taxation (Mkandawire 2005).

The emphasis of poverty discourses on support only for the most vulnerable groups in society has evaded some difficult distributional questions related to the position of middle-income and formal sector workers in developing countries, many of whom relied on public sector employment for their mobility and educational opportunities. In both African countries and postsocialist countries cutbacks in public sector employment have led to the downward mobility of these strata. As Haggard and Kaufman (1994:11) argue, this has significant consequences for resource allocation disputes because downward mobility can lead to antidemocratic mobilisation: it is difficult to emphasise solidaristic principles to underpin social policies as ‘blue-collar and middle-class groups are unlikely to support antipoverty subsidies unless they can share in the benefits, and they are likely to oppose them if they entail a reduction in existing services’.

Targeting has been justified in terms of cost containment and efficiency—the ‘most efficient and commonsensical thing to do under the circumstances’ (Mkandawire 2005: 3). Ironically though, many developed and developing country governments persist with targeting despite the ‘stubborn slew of empirical evidence suggesting that targeting is not effective in addressing issues of poverty (as broadly understood)’ (ibid p.20). It involves heavy administrative costs and demands the kind of administrative sophistication, information-gathering capability and infrastructural capacity that is difficult to find in many developing countries, with the result that significant numbers of poor people are often missed from targeted programmes while some of the non-needy are included (ibid.). Targeted programmes may also divide communities and create tensions between those who are included as beneficiaries and those who are not (Molyneux in this volume). Most strikingly targeting tends to be associated with increasing levels of inequality; this is well-captured in Korpi and Palme’s (1998) phrase ‘paradox of redistribution’: ‘the more we target benefits at the poor and the more concerned we are with creating equality via equal public transfers to all, the less likely we are to reduce poverty and inequality’ (p. 661).

The current jargon—‘fiscal restraint’ and ‘efficient allocation of resources subject to budget constraints’—seems to suggest that the problems of targeting are technical. By contrast, Mkandawire (2005) underlines the ideological and political imperatives which determine the choice of instruments used to address poverty, inequality and insecurity. As the literature on social assistance programmes providing unreciprocated aid to the ‘deserving’ poor has repeatedly shown, there is a strong element of control that underpins targeted programmes which goes against current notions of citizenship and empowerment. In measures such as community targeting much discretionary

power can be vested in local unaccountable administrators who then wield enormous powers over ‘matters of life and death’ (Mkandawire 2005).

It has long been argued in the context of US welfare policies that government programmes were divided into two, gendered, streams: those with the most legitimacy guaranteed secure entitlements to some citizens in return for their contributions, while other programmes provided unreciprocated aid to the ‘deserving’ poor (Fraser and Gordon 1994). The gender-coded contract-versus-charity dichotomy persists today in many countries in the opposition between social insurance and public assistance programmes. Welfare benefits targeted to women as mothers, for example, tend to identify women and their children as needy and poor, while shading out their contributions as workers/carers (whether paid or unpaid) and their rights as citizens. Social insurance programmes, on the other hand, confer entitlements on workers in return for their labour/financial contributions, even if in fact benefits depart from actuarial principles and do not reflect financial contributions (Fraser and Gordon 1994).

Current anti-poverty initiatives also invoke and depend on gendered assumptions about identities, interests and responsibilities of citizens. In recent years women have been heavily present in targeted social assistance programmes. This can, perhaps, be seen as a response to feminist policy advocacy in many national and global forums where women have been identified as ‘the poorest of the poor’ and governments were requested to take appropriate action. One response has been in the form of micro credit initiatives, which have been directed at women on the basis of their assumed thriftiness, efficiency and entrepreneurial skills.

Elsewhere social assistance is provided on the condition that clients conform to certain normative understandings of ‘good motherhood’ or appropriate female behaviour. This is most evident in the Mexican programme *Oportunidades*, explored by Molyneux in this volume. This is a programme that aims to enhance human development by focusing on children’s health, education and nutrition. It is premised on strongly normative—but implicit—assumptions about the ‘natural’ role of mothers as full-time carers and nurturers of children. The programme seems to be driven by the expectation that low-income mothers would accept benefits for their children even if these are made available on demanding terms (the unpaid work expected of them) as well as intrusive levels of control exercised by programme managers. This may very well be the case, given the lack of any better option as well as the side benefits that women may derive from involvement in such programmes, such as greater self-confidence, an ability to access public spaces and connect with other women beyond kinship and marriage networks. But such objectives are not always built into the programme (through training and group activities, for example), nor is it clear whether participation in such programmes enhances women’s economic autonomy and security.

The dual gender stream in ‘developmental’ social policy

Given the poor record of neoliberal policies in reducing levels of poverty, an effort has been made in recent years by some social policy analysts and international organizations (or parts thereof) to re-think the basis of anti-poverty programmes by focusing on the historical experiences of northern welfare states. Some analysts have

attempted to shift the global discourse away from targeting by reasserting the politics of social solidarity and universalism.^{vi} Drawing on the historical experiences of Nordic states the argument is made that social policy is not only an end in itself but also a means of enhancing economic dynamism, development and growth—in short, that social policy is developmental (Mkandawire 2004).

The concept of developmental social policy, which is sometimes used interchangeably with the notion of ‘productivist’ welfare state, has appeared in very diverse policy contexts. The early ‘productivist’ logic in East Asian social policy was premised on protecting and enhancing conditions for male workers in selected core industries, concentrating public expenditure on education, and relying on the family for the provision of care. The concept of ‘developmental social welfare’ also appears in various South African government documents, where it is defined as a welfare system ‘which facilitates the development of human capacity and self-reliance within a caring and enabling socio-economic environment’ (cited in Hassim this volume). Here it seems to have, perhaps unintentionally, instituted a hierarchy of entitlements in which wage-earning programmes such as public works are ideologically privileged over social assistance programmes. In yet another policy context, that of the EU, the notion of developmental social policy has been equated with ‘active labour’ and ‘work first’ strategies aimed at getting all adults into the labour force.

One of the common concerns that seems to underpin the ‘productivist’ logic in its different manifestations is the long-standing anxieties about the disincentives that welfare ‘handouts’ can create for work effort, leading to apathy and clientelism. Paid work, on the other hand, is seen as contributing to development while providing a

route out of poverty. There is clearly some truth to this logic: economic and social policies must be able to create economic dynamism and full employment—what East Asian developmentalist states were amply able to achieve in the 1970s and 1980s, and what is so out of reach for many developing countries (including South Africa) in the present era. But as we argued above, if poverty is to be reduced then what is needed is decent employment because some forms of paid work actually entrench poverty and erode people's capabilities. But even with this proviso we would argue that the 'productivist' logic remains problematic because it does not take into account the relationship between paid and unpaid forms of labour, and does not acknowledge that the latter is just as much at the heart of provisioning of needs as the former.

The Confucian principle of 'filial piety', which underpinned the reluctance of East Asian states to fund social care services, relied on women's unpaid care work within families. Similarly as Lewis and Giullari extensively argue, the EU 'active labour' agenda which aims to get everyone, regardless of gender, into the labour force but with scant attention to how individuals and households are likely to make arrangements for care work is likely to have gender-differentiated implications. As Elson puts it, 'in order to be gender equitable, full-employment policies must be complemented by entitlements for those in informal or part-time paid work and entitlements for the providers of unpaid caring labour as citizens in their own right' (2004: 70).

Education, health and contributory pensions are often treated as productive investments, while welfare grants tend to have a Cinderella-like status for finance authorities, especially when they compensate women for their unpaid care work. As

Steinhilber's contribution shows, this has been the fate of family benefits in both Poland and the Czech Republic since the 'transition'. Aggregate expenditure on family benefits declined over 1990s: in Poland from 1.7 percent of GDP in 1990 to 1.06 percent in 1998; in the Czech Republic from 1.6 percent of GDP in 1996 to 1.2 percent in 2002, even while total social expenditure increased. A similar reading emerges from Hassim's analysis of the struggles of the Lund Committee in South Africa in its efforts to protect and reform the child maintenance grant against criticisms from many in government for fostering dependency and having no developmental potential.

Comparative research on welfare states finds that service-heavy states (social democratic states that typically fund and deliver welfare services such as health, education, daycare and elderly care) tend to be more 'woman friendly' than transfer-heavy Christian democratic ones which tend to fund but not deliver public services (Huber and Stephens 2000a). The services considered include health and education as well as daycare, which tend to be citizenship based and which facilitate women's entry into the work force (both by releasing women from unpaid care work and also by creating jobs for women in the public care sector).

In the case of developing countries care services for children and the elderly are far less developed (much of the care taking place through informal kinship networks as well as informal paid care) but there is no doubt that welfare services such as health and education have the potential of reversing wider gender inequalities and discriminations. As Mackintosh and Tibandebage argue, 'health systems' immense political and social importance, and the association of health care reform with

political and economic crisis, implies that health systems *can be* sites of challenge to gender disadvantage’.

But there should also be a place for cash transfers or non-contributory income supports such as child allowances, family benefits and pensions within ‘productive’ welfare—resisting the notion that these are ‘handouts’ for passive clients. Income supports can play a crucial role in helping households to provide care, smooth out consumption and build up the capabilities of all household members, as the evidence cited by Lund on the South African Old Age Pension clearly shows.

The provision of accessible and accountable health and education services, as well as universal or near-universal entitlements to non-contributory pensions and other income supports remains of utmost importance to correct market outcomes and social arrangements that disadvantage low-income households, and low-income women in particular. It also requires a sound system of taxation—as Huber’s chapter argues and explores.

Looking at four countries—three in Latin America and one in the Caribbean—Huber documents the mixed record that these countries have had over the last two decades in reforming their tax systems, with the predominant trend being a negative one. In three of the four countries overall tax receipts as a percentage of GDP has fallen (the exception being Costa Rica), and three of the countries have come to rely more heavily on indirect taxes levied on domestic goods and services (the exception being Jamaica). Both developments are bad news for the state’s capacity to reduce poverty, inequality, and gender-based disadvantages. With a lower tax revenue the state has

less fiscal capacity to provide the kind of social services that we know are critical for low-income households and for low-income women in particular, and indirect taxes also tend to be generally regressive. And yet while it is politically difficult, it is nevertheless possible to construct overall progressive tax systems that are effective in raising at least moderate levels of revenue to fund state social provisioning, even at comparatively low levels of development, as demonstrated by the example of Jamaica. As Huber concludes, the requirements for this are: reliance on direct taxes with an adequate standard deduction and few special deductions for higher income earners for an important share of the total, a structure of indirect taxes that exempts only basic goods and services, and social security taxes without a cap. However, there is no escaping the fact that taxing high-income groups is politically costly, and that liberalization has made taxing corporations more difficult.

Families, Politics and State Development in a Global Context

Debates about the relative balance of responsibilities between state and non-state institutions in the provision of social services and social support are underpinned by normative assumptions about the role of the state as well as about gender roles. The residualist approach to social policy is not just an innocent statement describing the limited role played by the state in social provisioning, but one prescribing how states *ought* to behave. As feminist critics have repeatedly argued, the shedding of state responsibilities shifts even further the burden of social provisioning to the unpaid providers of care within families, households, and communities. On the other hand, defining the state ‘as the central locus of social policy’, as Molyneux (forthcoming) notes, also carries normative assumptions, alluding to a vision of a strong, capable and

socially responsive state. While much of the debate between neo-liberals and their critics tends to be cast in terms of markets versus states, in many countries, low-income populations have to creatively combine social supports from a mix of formal and informal social institutions for their security. As Molyneux goes on to argue, ‘social reproduction is in such cases secured by a variety of social practices and institutions that exist independently or work in conjunction with “state action”; yet this interface, if it is acknowledged at all, is rarely analysed in the social policy literature’ (Molyneux forthcoming).

In this section we address the interface between the state and other social institutions. Firstly, we discuss the implications for gender equality strategies of the assumptions made by states about the role of the family in social provisioning, and the ways in which state policies attempt to reform the family. Secondly, we address the implications for developing gender-responsive social policies of differing levels of capacity, reach and legitimacy of state institutions. Finally, we consider the ability of women’s organizations to extract benefits for women out of processes of political liberalization and democratization.

Assumptions about families and the politics of familialism

Existing welfare state models are based on culturally and historically specific conceptions of the divisions between public and private (and in particular on relatively secularized public sectors), of the nuclear nature of the family, and of fairly differentiated institutional spaces occupied by the care economy and paid work. In these contexts, feminist critiques of Gösta Esping-Andersen’s (1990) test of

‘decommodification’ (the extent to which citizens can attain a basic standard of living independently of the market) have focused on adding the test of ‘defamilialisation’.

This is defined as ‘the degree to which individual adults can uphold a socially acceptable standard of living independently of family relationships, either through paid work or through social security provision’ (Lister cited in Sainsbury 1996: 39).

Hobson (1990) and Orloff (1993) have further refined this concept by suggesting that feminist analysis should focus on access to paid work and capacity to form and maintain an autonomous household. These critiques emerged in a context where support to individuals was channeled through families as the unit of entitlement, with women often required to conform to dominant stereotypes of ‘good’ wives and mothers. Entitlements based on citizenship are potentially defamilialising, as they de-link entitlements from marital status and motherhood.

Yet both the test of decommodification and the test of defamilialisation are difficult to apply to less industrialized developing country contexts, where commodification is weak and families and social networks, such as extended families and religious groups, remain important cultural and survival resources. Feminist social policy analysts by no means argue for a notion of individuals as atomised and autonomous beings. Yet even the limited forms of defamilialisation that are proposed (for example, women’s capacity to maintain households autonomously of their dependence on others) are difficult to apply in contexts where family and kinship networks remain important to people’s livelihoods and security, and where non-familial provision of social security is weak.

This kind of social embeddedness is not only a primary source of identity; it also structures women's economic entitlements by offering them some access to resources such as land, housing and childcare even if only as a consequence of their marital or maternal status. In extended families, the presence of multiple contributors to the household's security in high-risk environments acts as a mechanism for spreading risk and mobilizing resources for investments and for social reproduction (Whitehead and Kabeer 2001). In the midst of economic crisis, when jobs disappear and the little state provision that there is becomes eroded, these networks take on an even more critical role as the ultimate safety net. Beneria and Floro's contribution to this volume documents the ways in which low income households in Ecuador and Bolivia draw on kinship and family networks and systems of reciprocity and mutual support for protection, income-maintenance and as a way of smoothing consumption. Formal social protection mechanisms in these communities are conspicuous by their absence.

Yet, there are at least two issues that we need to consider when analysing the ways in which families and households provide security and social provisioning in many developing countries. First, feminist research amply shows the ways in which women are often disadvantaged vis-à-vis men in the pursuit of livelihood security, through both intra-household inequalities in the allocation of resources and the sharing of burdens, as well as inequalities generated by biases in the wider institutional arena. One example of such inequalities emerges from Beneria and Floro's chapter: not only do women in these low-income households continue to shoulder a disproportionate share of the unpaid work involved in household reproduction (alongside their increasing participation in paid work), but they also have a higher debt burden than the men in their households as a consequence of assuming greater responsibility for

debt repayment and household maintenance. Second, while classical liberal theory sees the family as a realm unto itself – distinct from civil society and shielded from incursions by the state – the notion that states and families operate as ‘separate spheres’ does not hold up to historical scrutiny (Haney and Pollard 2003). Nor does such a framework assist our understanding of contemporary reforms in state roles and obligations vis-à-vis social welfare, which carry enormous implications for what is expected of families (and women in particular). Indeed, comparative work on the family in contemporary societies, especially post-socialist Eastern Europe, shows how ‘the familial’ may be deployed to assist states’ reform of—and often retreat from—social life (Haney and Pollard 2003; Haney 2003).

There is growing policy interest in devolution of responsibility from the central government to local governments (through decentralization) as well as non-state actors, especially ‘communities’, according to the principle of subsidiarity—reliance on the smallest possible unit that can perform a given social function effectively. These ideas have always been very strong in religious-based conservative political parties and movements, for example in Christian democracy, which has also placed strong emphasis on traditional family values and arrangements. But the underlining of women’s traditional roles associated with caring and the neglect of their economic autonomy and security is also evident in some contemporary anti-poverty programmes, as Molyneux’s analysis of the *Oportunidades* programme shows.

The current policy emphasis on subsidiarity tends to show very little interest in the gendered workings of non-state institutions and the ways in which they can reproduce and entrench gender inequalities. Who in the community does the caring and on what

terms? Who does the voluntary work? Who benefits from social provisioning provided by religious-based voluntary institutions and on what terms? Who in the household does the bulk of social provisioning and caring? These questions are not new. They lie at the heart of debates to measure the extent of social rights in welfare states and are central to contemporary processes that have been loosely termed 'reprivatization'. The care burden imposed by the AIDS epidemic, as Mackintosh and Tibandebage note, has cruelly exposed the inadequacy of the assumptions about women's coping capacity and unlimited labour supply. This is forcing onto the policy agenda questions about care and its provision, and the costs to the carer of unpaid and voluntary work.^{vii}

Steinhilber's chapter shows that despite the divergent reform paths taken in Poland and the Czech Republic, in both countries the family was addressed as 'the most natural' social institution to ensure care for its members; as increasing responsibilities were assigned to families in the reform process, supporting families in coping with the social fallouts from the transition was considered eminently important. Gender relations in families, however, and the impact of family benefits on them did not become an issue for public debate. Indeed, reform discourses have invoked and aimed to recreate traditional gender arrangements with motherhood as a full-time dedication. These idealized notions of the family and of women's roles are often in conflict with the reality of women's day-to-day lives and their continued attachment to the labour market (more so in the Czech Republic than in Poland). Indeed, women face greater difficulties in the post-reform era in combining employment and family responsibilities than they did prior to the reforms. Ironically, despite the pro-family rhetoric, in both countries aggregate expenditure for family benefits declined over the

course of the 1990s. In Poland, the share of family benefits in total social expenditure declined while total social expenditure increased.

A more radical engineering of the family is evident in the Islamic Republic of Iran where a revolutionary Islamist state has sought to re-structure the family, and society more broadly, along traditionalist lines by attempting to segregate all public spaces, and to fully domesticate women.^{viii} Moghadam argues that state 'developmentalism' in the Middle East was undermined by its 'neopatriarchal' approach to women, gender, and the family, codified in family laws/personal status codes that define women largely in terms of their filial, marital, and maternal roles, place them under male guardianship, and deny them equality in access to family wealth. Although state social expenditures did allow for social mobility and access by some women to education and employment, on the whole, oil wealth and family laws served to prevent the 'commodification' of women's labour. On these grounds she argues that processes of individuation and commodification need to be supported as without these developments women are unlikely to be considered as economic agents and right-bearing citizens. Hence, some disembedding of social provisioning may be desirable as far as gender justice is concerned.

Individualist approaches to development have, however, been criticised for assuming that poverty is the result of individual (or even broader cultural) deficits, rather than structural features of dependent peripheral economies. Instead, both from the left and the right of the political spectrum, there has been a tendency to focus on the community as the locus of welfare and the site for social justice. Left perspectives on community tend to emphasize the building of agency and participation through local-

level democracy that often draws on indigenous practices of collective responsibility, mutuality and reciprocity. While women provide the backbone of caring and sharing within communities, notions of justice and entitlements embedded in community institutions may, however, be oblivious to gender equality.

Many community-based initiatives for addressing poverty have drawn on women's skills and capacities to develop programmes over which poor people have control and develop collectivist strategies that assist in broader democratization of society. These kinds of collectivist programmes link community well-being to political goals, often tied to socialist advocacy. In some cases, they are so successful that populist governments co-opt them as part of the project of legitimation (see Blondet 2002 on Peru). The political framework of collectivism, however, is very different to communitarian approaches that emphasize sharing and caring within communities rather than directing demands to the state (Midgely 1995: 91). These attempts to enhance community self-control can often be retrogressive for women, particularly when linked to the entrenchment of traditional forms of authority and cultural stereotyping of gender roles. These cultural contestations can often be very muted yet the effect of powerful traditionalist interests and visions can be far-reaching, as the case of Iran clearly demonstrates.

The resilience of these informal institutions, their ability to substitute for state services, and their effectiveness at providing members with dignity and social purpose, mean that these institutions must be recruited to the task of rebuilding social cohesion in failing states (UNRISD 2005: 259). It may however prove very difficult to insert gender-equality concerns (or broader social equality concerns) to these

processes, especially where traditional institutions have a patriarchal character. But traditional institutions can be held accountable to basic constitutional standards of social equality, if there is a strong, legitimate and capable state that is committed to women's rights.

As Guillari and Lewis show, this kind of state was hard-won in the North, and the commitments to gender equality have to be continually re-negotiated in the face of economic and political shifts. Yet these struggles have been difficult for feminists to pursue in developing countries in the late twentieth century. The closed, nation-state model of development that, for example, enabled organized labour to extract some livelihood guarantees has been undermined by processes of economic liberalization and the indebtedness of many countries. This has impacted on political struggles to reduce the vulnerabilities of citizens to the market. Finally, the institutional legacies of the state play a major role in determining the extent to which states are able to carry through developmental programmes to reduce social inequalities.

Developmental state variation is marked by the different capacities – economic and political, to be sure, but also infrastructural – of different states that shape the extent to which collective struggles for greater protection are successful. The next section examines the interplay between these factors more closely.

Reach, capacity and legitimacy of state institutions

There are enormous variations in state-society linkages and state capacity between developmental states in Latin America, Asia and Africa. Postcolonial governments in Africa were initially committed to the idea of an active state that would drive

development and poverty reduction. As Robert Bates points out, although African governments adopted different developmental paths, ‘they were virtually all activist’ (Bates 1994:15). However, for at least three decades following independence, most governments did not expand the institutions established by colonialism (executive, civil service, police and army) in ways that consolidated democracy or even their long-term ability to sustain a developmental focus. In particular, institutions that would constrain executive power such as multiparty elections, judicial independence and, outside the state, institutions that might expand the legitimacy of the state and its capacity to represent diverse interests (such as vibrant civil society) were either severely restricted or actively repressed. By contrast, those institutions that were seen as either enhancing the capacity of elites to manage or to remain in power, such as the bureaucracy, expanded rapidly. Importantly, however, bureaucratic expansion was not tied to efficiency or to citizen responsiveness.

Structural adjustment policies further weakened states’ commitments to social sector spending, undermining the purchase of nationalist governments on the loyalties of poor people. Donald Rothchild (1994) argues that state autonomy was weakened at a crucial stage and the state was unable to regulate society effectively or to implement its ambitious developmental programmes. The inability of postcolonial states to deliver on the developmental promises that accompanied political independence, whether as a consequence of leadership deficiencies or external impositions, weakened state legitimacy, with many groups in society disengaging from making demands on the state and instead entrenching informal, traditionally based systems of governance and resource allocation. Citizens bypassed the state as the locus of their demands, meeting their needs through a combination of informal mechanisms and

developing allegiances to local political actors rather than the state *per se*. These developments reinforced the peculiar dilemma that new democracies face, as Gordon White (1996) has pointed out: lacking legitimacy, new democracies cannot become effective; lacking effectiveness they cannot develop legitimacy.

To be sure, policy outcomes are shaped not just by political commitments to invest in the reduction of social inequalities, but also by the capacity of institutions to implement policy. Yet there is no simple relationship between public spending and outcomes in terms of poverty reduction. A key intervening feature in the struggles to develop effective systems of risk reduction for poor people is the institutional character of the state. Democratization depends to a significant extent on the consolidation of state power and the institutionalization of political contestation within elites and between elites and other social groups (Rueschemeyer et al. 1992). Gordon White argues that the effective linking of democratic and developmental goals depends on the construction of ‘an effective developmental state that is regulatory, competent and redistributive, and has the political authority to manage social and political conflicts’ (quoted in Minogue 2002: 127).

The ‘good governance’ approach of the World Bank, which promoted democratization through institutional development, recognizes the importance of ‘getting the state right’. However, the emphasis is on strengthening the institutions that are considered to be essential for capitalist development such as those responsible for financial management, private property rights and rule of law. The aim of contributing to more efficient government has not necessarily been linked to the value of promoting government accountability downwards to citizens. Women clearly have

an interest in a responsive and accountable state, but one that is responsive to their particular needs. There are gender-specific capacity failures in all public institutions targeted for reform. Public expenditure management systems fail to acknowledge women's needs or distribute budgetary resources equally. The civil service or judiciary may be dominated by men antipathetic to gender equality. Women public-sector workers clustered at the bottom of state bureaucracies may be the first to be fired when cost-cutting efficiencies are introduced (UNRISD 2005: Chapter 11).

As the Latin American and East Asian chapters suggest, competent public bureaucracies that are at least internally accountable can be made responsive to the needs of women. In these regions states appear to be more able to act on political agreements struck between political parties and other actors. Latin American states achieved consolidation relatively early and on the whole in association with demands for mass incorporation into political institutions (Rueschemeyer et al. 1992). Although there are variations in the social composition and democratic credentials of states, on the whole Latin American states have been pervasive, relatively well-institutionalized and with a strong history of interventionism. Grindle (1986: 13) argues that 'the Latin American state has played a considerable role in the mediation of social conflict through co-optation, manipulation and coercion and this helps account for the complexity and conflict that exists within the bureaucratic apparatus of individual countries'.

The institutional context of democratization was also different in East Asian states compared to sub-Saharan Africa. East Asian states inherited highly evolved bureaucracies from a combination of Japanese models as well as from strong

networks between state and political and economic dynasties. This left a strong foundation for the developmental states (indeed the authoritarian legacy allowed developmental states to intervene in markets in productive ways). In these contexts, the development of gender-equitable social policies was dependent far more on winning political support and social consensus over the direction of social policy than on state capacity to absorb women's demands.

Weak state capacity also impacts on the kinds of strategies feminists can employ in making social policy more gender-equitable. One of the most innovative of these strategies, gender-responsive budgeting (GRB), has suffered from the combined problems of political will and state capacity. This strategy is often adopted because it is seen as the key tool for exposing and thereby re-directing government policies and spending patterns to more gender equitable ends. As a 'technical' tool, it is often regarded as a strategy that can bypass political and cultural obstacles to equality. However, as Budlender argues in her chapter in this volume, GRBs can often become a panacea for the more politically difficult work of re-directing political will and institutional capacity. Budlender very clearly demonstrates the differential outcomes of particular political contexts as well as the effects of the lack of receptivity of politicians and state bureaucracies to change. Policy inertia seems to dominate while opportunities for change (brought about by a combination of strong politicians, often female, with effective alliances in the face of government receptivity to change) seem to be very rare moments.

Social policy as political struggle

Opportunities for creating states and political systems that are more responsive to the needs of constituencies of poor people were greatly enhanced by the wave of political liberalization that swept through developing countries from the late 1980s. Processes of political democratization raised expectations in civil society that more redistributive policies would be followed, as indeed in many countries it did.

However, an important factor that needs to be taken into account when considering the link between liberalization and redistribution is the strength of political organization among poor and working people in developing countries. To what extent was democratization forced from below rather than imposed from above by a combination of local and foreign elite interests?

Even with the recognition of the need for a more activist state in global lending institutions and the provision of more comprehensive protection for the poor, in many African countries the impetus to provide social protection was externally set, as part of the conditionalities of debt relief. The combination of this factor with the weak tax base and small middle class in very poor countries had the effect of removing social policy from the arena of national politics. As we suggested above, these factors have consequences for the quality and financial sustainability of social programmes.

However, they also impact on the process of building a social value consensus and on the political sustainability of social programmes (Tendler 2004). As Tendler points out, in such situations the 'national anchor' for social programmes is easily lost, and the anti-poverty agenda inadvertently can become an 'anti-labour' agenda. Building programmes that provide protections beyond the 'poorest of the poor' to include the organized working poor becomes more difficult in the face of the combination of

residualism promoted from above by global lending institutions and populist arguments that employed workers represent a labour aristocracy.

Similar political consequences are evident in the interventions of global lending agencies in Eastern Europe. As Steinhilber shows, in Poland, which pursued a rapid reform path, there was a wholesale dismantling of the welfare benefits system that had existed under state socialism. The resulting residual, familial model, apparently gender-neutral, downscaled 'costly' benefits and services that supported women's dual role as worker and mother. The absence of strong, local feminist lobbies or allies in political parties allowed the adoption of a residualist welfare model that seriously undermined women's social rights.

A different dynamic was at play in East Asian developmental states, where the process of democratization was more successfully pushed by local actors, and with clear consequences for the expansion of social protection. Peng shows how male bias in both the Korean and Japanese systems only softened as a consequence of demographic shifts – declining birth rates and an ageing population – that in turn became the touchstone for political competition. These demographic changes, together with broader social changes, facilitated the erosion of traditional living arrangements, increasing divorce rates and increasing numbers of single mothers, accompanied by the increasing employment rates of women (including married women). These social trends created a tension between caring needs on the one hand (of children and the elderly) and the availability of women to provide unpaid care on the other. Together these factors resulted in shifts in social policies with increasing welfare expenditures. Care of the elderly shifted from being means-tested to rights

based, while public supply of childcare was increased and parental leave extended. All of this was facilitated by political regime shifts, the extent to which social policy became an electoral issue and increasing numbers of women in political office.

On the other hand, as Hassim's chapter shows, similar processes of democratization in South Africa have not had the same effects on the social welfare system. There, the potential redistributive effects of regime shift and expansion of women's access to political office were mitigated by a dominant party system in which social policy did not become part of electoral contestation, and by a labour market characterized by high levels of unemployment rather than labour shortages.

Women's movements in developing countries have an uneven record of organizing for better and more appropriate forms of social protection. Many women's movements in developing countries have eschewed state-centred politics, questioning whether women's citizenship could be expanded by states that were fundamentally undemocratic in character. States are clearly not neutral in designing and implementing social policies, but they are not self-evidently patriarchal either. Gender relations are shaped by, and themselves shape, the nature of the state and by its relationships to other social institutions; in this sense institutions are interpretive systems that give meaning to particular notions of social positioning and citizenship. Yet unlike institutions like the family and community, states may be more permeable to women's interests in contexts of strong social conservatism. This may offer openings for women's movements to extend the reach of social programmes in ways that address women's gendered vulnerabilities. For example, in Latin America collectivization among poor women did lead to successful pressures being brought to

bear on ruling parties that were seeking to extend their legitimacy among poor citizens. Populist governments in the region sought to expand the basis of their legitimacy by expanding the welfare net in ways that benefited both men and women.

It can be argued, therefore, that women *have* successfully made claims on the state, very often by harnessing their maternal roles to political claims-making and advocacy for better conditions and social support for women. Although maternalist politics has had contradictory and different outcomes in different countries, this form of claims-making shares an implicit acceptance that the rights women were claiming should come in return for certain pre-given responsibilities tied to traditionally-ascribed gender roles. This acceptance of traditional gender roles rendered maternalist movements and demands controversial. The protean character of maternalism also lent itself to subtle shifts from ‘a vision of motherhood in the service of women to one serving the needs of paternalists’ (Koven and Mitchel 1993:5). As such maternalism may reinforce the patriarchal gender order and entrench women’s economic dependence on men—it can become ‘a cloak for paternalism’ (ibid.). For example, Islamist women activists in Iran have tended to use maternalist arguments for greater social protection focusing on rewarding women’s unpaid labour without addressing the underlying power relations of gender. Consequently, Moghadam argues for a secular politics that focuses on women’s access to the public sphere of paid labour and political participation. From this platform, she argues, women are more likely to succeed in making family relations more equitable.

Representation, political parties and social policy change

More recently, the international women's movement (for example, in the Beijing Platform for Action and WEDO's global 50-50 campaign) is focusing on access to formal political institutions as a key strategic lever to advance gender equality. Such campaigns attempt to create mechanisms through which women can enter into parliament in their own right rather than at the behest of benevolent political parties. The success of this strategy rests on a number of factors, most importantly the strength of gender equity lobbies in political parties and civil society, the way in which political competition is organized and on the extent to which women can make issues of social policy electoral issues. There are many examples of women's movement activism, but fewer examples of successful party mobilization in support of social policies.

On the face of it, certain kinds of one-party and authoritarian regimes have paradoxically been permeable to some kinds of gender claims. These openings were created not only for conservative maternalist political claims (as in the authoritarian regimes in Latin America) but also for feminists. For example, women in Uganda did benefit in many respects from the patronage of Yoweri Museveni, gaining a large number of reserved seats in parliament. However, the dependence of the women's movement on the National Resistance Movement was tested severely by the end of the 1990s, when women failed to gain support for removing traditional obstacles to women's ownership of land (Tripp 2002). The Ugandan experience is a salutary reminder of the limits of party-political patronage for gender activists.

The chapters by Hobson and Peng examine countries where gender equality was successfully inscribed in social policies. Hobson argues that winning support from

political parties and raising the electoral stakes of gender is crucial to women's movement success. However, there is enormous variation in the political party landscape in developmental states. Where party formation is relatively strong with deep histories and clearly developed ideologies, the ability to make electoral gains depends on the extent to which there is political commitment to redistribution. In Japan, for example, social policy emerged as a key electoral issue in the 1990s, political parties distinguishing themselves on the basis of their positions on social welfare. Women's organizations had been campaigning for social policy reform since the early 1980s, but it was only as a result of broader political shifts that women in association with groups representing the elderly became an electoral constituency. Their prior organization around social policy enabled them to offer policy alternatives to which political parties had to respond.

By contrast, in many liberalizing African states, political parties are not as well established around issues and social programmes, but tend rather to be vehicles for personalistic power and ethnic ambitions. Trade unions are relatively weak, exacerbated by the large informal and agricultural sectors. Policy alternatives are rarely the basis on which voting takes place, even in a country with a relatively diverse and long tradition of party mobilization such as South Africa. In these cases, the elite bias of political competition is reinforced and women's organizations, like other sectors of civil society, may see few incentives in advancing their claims through the party system. In post-socialist states, for different historical reasons, both political parties and women's organizations are not deeply institutionalized and the relationship between gender equality and social policies is not a central political issue.

As Hassim's chapter shows, the inclusion of women in the formal institutions of the state, and references to 'gender equality' in policy documents, do not necessarily lead to the redistribution of resources and power in ways that change the structural basis of gender inequality. Inclusion can be an avenue for reinforcing elite women's access to the formal political system while not translating clearly into policies that address the needs of larger constituencies of women. Although many new women members of parliament have taken 'poor women' as their constituency (at least in moral terms), it has been all too easy for them to focus on anti-poverty programmes as the only form of pro-women intervention (Hassim 2006). Yet, as we have argued above, a focus on the 'poorest of the poor' is an inadequate strategy for advancing gender equality as it does not build a sustainable system of social protection that takes account of women's particular gender interests which can sometimes cut across social class. As Tsikata points out, we need to be careful that the emphasis on the basic needs of poor women and their children does not displace issues of gender relations and power (Tsikata 2000: 6).

On the other hand, without political rights and access to the public sphere, women cannot even enter debates about social policy. Moghadam's chapter underscores the argument that economic and political rights are important prerequisites for gender equality. 'Neopatriarchy' offers women few avenues for political intervention and democratization of the formal institutions of state and policy-making is self-evidently necessary as a key step in advancing democratic social policy. Unlike South Africa, transitions from state socialism did not open spaces for feminist interventions. Rather closer to the experiences of the Middle East, post-socialist countries 'retraditionalised' the family, upholding the distinction between the public and the

private spheres (Haney and Pollard 2003). The family was seen as ‘a site of refuge amidst chaos and unpredictability...and served as a model and metaphor for transition’ (ibid: 7). In Poland, even the several brisk changes from left to right wing governments during the 1990s did not result in progressive policies for women, because of the dominant social conservatism (Steinhilber this volume). Women were poorly represented in government and the bureaucracy and there were few openings for feminists to make policy interventions. However, in response to the scaling back of benefits women’s organizations are beginning to make social policy reform part of their political activism. Similarly in countries such as Iran the family is idealized as the antithesis to Western individualism, making feminist struggles for more egalitarian social policies that recognize women’s rights extremely difficult to pursue.

Concluding Remarks

We have noted that historically, state social provisioning and protection was premised on a normative male breadwinner/female carer model, even if in reality many women were in the labour force. That model has eroded over the past two decades, with the global increase in women’s labour force participation worldwide. However, despite the convergence in men’s and women’s crude economic activity rates, gender segmentation is not disappearing from the world of work—not even in Sweden where men continue to work full time and invest in their careers, while women work ‘part time’ in the public sector, where it is easier to combine employment with having a family. The link between paid work and entitlements to social benefits has been further weakened by processes of labour informalization or casualization, which have

been part and parcel of liberalization policies over the past two decades. A greater proportion of women's paid work (compared to men's) tends to be of the informal kind, and within the informal economy women tend to dominate the more casual and less remunerative niches.

Labour market segmentation and casualization mean that increasing numbers of people, particularly women, are likely to be excluded from access to social services and income supports if these are provided on a commercial basis or on the basis of labour 'contributions' as in the social insurance model—ironically the two paths that have dominated social sector restructuring in the 1980s and 1990s. In theory it is possible to extend the coverage of social insurance programmes to include informal workers—as some countries in East Asia and Latin America have attempted—but only if their contributions are heavily subsidised (by the state). An effective means for reducing gender-based poverty and inequality would be public provision of accessible and accountable social services (especially health and education) as well as citizenship-based entitlements to basic income support (pensions and family/child allowances).

Despite significant differences played by families and households in social protection and provisioning (these being the ultimate safety nets in many poorer developing countries), it is nevertheless intriguing that the provision of unpaid care remains so feminized everywhere.^{ix} This is a major factor feeding into women's disadvantages in the market economy. But it is also important to underline that care is central to human flourishing and to social and economic development. However it is also an area that remains marginal to the concerns of mainstream policy actors across ideological and

political divides. Only under exceptional circumstances is any explicit attention paid to women's unpaid care work. Otherwise policy actors either assume that families and communities (i.e. women within those units) will continue to provide care, or as in the case of conservative and religious based movements and policies, reinforce women's caring duties as part and parcel of their ideological crusades to restrict women's choices.

But there are also serious policy questions about what to do about care: how in particular to reconcile the needs and rights of those who require care with the needs and rights of those who provide care (whether paid or unpaid), and how to foster responsibility for sharing care between men and women? Provision of accessible, affordable and high quality care services (for children, the elderly and others with intense needs) is of course a *sine qua non*. But it is impossible to fully de-familialise care, as Lewis and Giullari emphatically argue. The bulk of unpaid care work is carried out, largely by women and girls, within families, households, and community and kinship networks. These are the institutional arenas that are also likely to reproduce gender disadvantage. States often do mould certain kinds of families and gender arrangements through legal instruments, often emphasizing women's domesticity and restricting their economic citizenship. While it is difficult for states to oblige men to share equally in care work, they can provide incentives for them to do so. In the Nordic countries, for example, while 'daddy leave' quotas may have had a small impact on how men and women divide their unpaid care responsibilities, they nevertheless have enormous symbolic value. The same countries have been less forthcoming in reforming the male employment model, by reducing working-time (a shorter working week and the regulation of over-time for example).

In the case of many developing countries, public or private care services for children and the elderly remain underdeveloped and the great bulk of care is assumed by women and girls as members of families and households, while some of it (in middle class households) is purchased through informal arrangements. In these contexts, a priority must be the strengthening of states' capabilities to provide basic infrastructure (piped water, roads, electricity) and accessible and affordable public health services, which are likely to reduce women's unpaid workloads. The sharing of unpaid care work between women and men would require different strategies from those used in advanced welfare states, given that the bulk of paid work is unregulated in many of these countries.

The state is a key institution as an organiser if not necessarily a provider of social protection and provisioning. It is clear that states that are well-institutionalised are better able to translate political commitments into effective social policies and delivery systems. Women thus have an interest in making states more responsive and accountable to their citizens. Neo-liberal approaches to state reform in developing countries have, however, tended to undermine the capacity of states to be responsive to the needs of their citizens. The renewed interest in the state (in the 'good governance' paradigm) offers some opportunities for the creation of gender-responsive states. But this would require that more attention be paid to developing political accountability to citizens and that women be seen as part of the 'publics' that need to be responded to and served.

Related to the point above, this volume suggests that we need ‘thicker’ understandings of democracy that go beyond supporting multipartyism and the numerical increase of women in national parliaments. Both of these are important prerequisites for reducing inequalities, but they need to be buttressed by deeper levels of political participation. This would include developing the capacity of women’s organizations and civil societies in general to interpret and articulate the needs of different constituencies of women in policy terms. It would also include more strategic use of political parties as vehicles of representation by pushing for social policies to become electoral issues.

Last, but not least, women have fought for the state to recognize their needs in various ways (including maternalist demand-making) but not always in ways that challenge the underlying power relations of gender. In some countries the absence of strong feminist lobbies, or allies within political parties, has allowed the adoption of a residualist welfare model that has seriously undermined women’s social rights. Difficulties in clearly articulating women’s needs in social policy terms, seems to be as much a problem in the South as it is in the North.

Charts 1.1 through 1.7 here

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ⁱ One response has been the 'good governance' agenda promoted by the World Bank, which rehabilitates the state by emphasizing the role of 'lean' state bureaucracies and judiciaries in creating the conditions for market competition through the enforcement of private property rights and contracts, and by 'regulating' private industry and commercial social services (World Bank 1997, 2003; Fukuyama 2004).

ⁱⁱ The welfare state broadly defined not only includes transfer payments but also the public funding and delivery of goods and services, such as education and health. However, the quantitative literature on the development of the welfare state contains a one-sided focus on transfer payments (and neglect of social services), which is related to the other major lacunae in this research—the role of gender (Huber and Stephens 2000a).

ⁱⁱⁱ The other categories were ‘strong male breadwinner states’ where Ireland and Britain were placed, and ‘modified male breadwinner countries’ which included France (Lewis 1992).

^{iv} Though long part time, 20 to 30 hours per week.

^v ‘Informal sector’ covers informal enterprises. Informal employment is a broader category that includes all workers who work without secure contracts, worker benefits or social protection; so it can include those who work as informal wage workers for formal enterprises or households (e.g. casual labourer, domestic worker) (ILO 2002).

^{vi} ILO, UNRISD, UN/DESA, UNESCO, UNDP (and even some parts of the World Bank) are among the organizations often mentioned as those promoting this global discursive shift (see GASPP 2005).

^{vii} There are some similar gender concerns about the burden and division of care work in the more affluent countries in the context of aging (Stark 2005).

^{viii} What the Islamist state has attempted to do however should not be mistaken for social reality. Processes of social change, in which women have been major change agents, have subverted many of the Islamisation measures promulgated by the state.

^{ix} For developing countries, however, we need more systematic analysis of unpaid work than is currently available through the existing time use surveys.