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# Politics of De-familialisation: A Comparison of Italy, Japan, Korea and Spain

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#### 1. Introduction

This paper investigates the politics of "familialisation of care" in four familialist countries—Italy, Japan, Korea and Spain—during the past fifteen years. By "familialisation of care," we refer to those public policies, which aim at reducing the care responsibility of the family—both for the young and the old. As for childcare, we focus on childcare expansions for the very young (0-2 years old), in particular. For our purpose, we consider policy decisions to provide care services publicly and/or to publicly subsidize market-based provision of care services to be equally defamilialising.

Childcare and Long-Term Care for frail elderly have been two important areas of recent welfare state expansions related to new social risks (NSR hereafter). The existing European scholarship on NSR recognizes that important transformations that have occurred in countries such as Germany and the Netherlands, but downplays the changes in Southern Europe (Bonoli 2013; da Roit and Sabatinelli 2013; Knijn and Saraceno 2010; Morgan 2013; León and Pavolini2014; Pavolini and Ranci 2008; Palier and Martin 2007).

Our four-country comparison enables us to identify previously overlooked policy variations and to put forth a new causal argument to explain them. There have been more dramatic policy changes in Korea and Spain relative to Italy and Japan. Interestingly, we observe that these policy shifts in Korea and Spain were also accompanied by other family and gender equality policies beyond social policies. What factors enabled these big shifts in Korea and Spain? Does the absence of such factors explain why policy changes were slower in Italy and Japan? Japan provides a further puzzle. While it lagged behind other countries in childcare expansion, it successfully implemented a big policy

shift in the provision of formal services for frail elderly. In sum, we want to understand what conditions promote the de-familialisation of care in countries with very strong familialism. This is an important question because as feminist scholars have pointed out, "care regimes" are about how gender relations are institutionalized (Bettio and Plantenga 2004; Daly 1997; Knijn and Ungerson 1997; Michel and Mahon eds. 2002; Orloff 1993; Pfau-Effinger, Flaquer and Jensen 2009; Saraceno 1994; Lister1994). Hence understanding how care regimes change is of crucial importance from a feminist perspective (Daly and Lewis 2000).

We build upon the existing literature on NSR by highlighting the role of those macro-political institutions that have not received sufficient attention. We consider different institutional contexts that give rise to different types of policy processes, which we distinguish as "problem-oriented" versus "election-oriented" policy shifts. We attribute the cross-national variations among our four countries to the different institutional contexts instead of their differences in terms of the partisan government composition or cultural/attitudinal orientations.

Our paper proceeds in four sections. Section I documents the cross-national variations in childcare and Long-Term-Care for the elderly in the four countries, which this paper seeks to explain. Section II reviews and evaluates the relevant literatures.

Section III presents our causal argument. Section IV applies it to the four country cases. Section V briefly concludes.

#### I. Defamiliazation of Care in Italy, Japan, Korea and Spain

The four familialist countries—Italy, Japan, Korea and Spain—have gone through phases of "defamilization" at different times and to varying degrees. Figures 1 and 2 visualize the recent policy developments in formal childcare for 0-2 year-olds and longterm care for frail elderly (hereafter LTC), respectively, by situating our four countries in a comparative perspective. As Figure 1 shows, during the 2000s, Korea has dramatically increased its formal childcare enrolment rates for infants in absolute terms. Korea today compares very favorably to most other OECD countries on this score. Although Spain lags behind Korea in the absolute levels, the relative change in Spain has been significant: the enrolment rates in Korean during the period covered here expanded nearly 300% while the rates in Spain expanded slightly less than 400%. In contrast, the changes have been more limited in Italy and Japan. Japan has been the most stagnant country in this respect despite numerous government plans to increase the enrolmente rate (Estévez-Abe 2008; Estévez-Abe and Kim 2014; Peng 2002; Schoppa 2006). Interestingly, Italy experienced expansion between 2003 and 2007, but its expansion was very modest in absolute terms.1

It is worth noting that the childcare enrolment rates in Italy and Japan are more favorable than those in Germany, which so many scholars consider as a successful case of the "Swedish turn" in its work-family reconciliation policies.

#### [Figures 1 and 2 around here]

Figure 2 shows how coverage has increased in the LTC services since the early 2000s. Because of our interest in defamilialisation, we look at services-in-kind and not at

<sup>&</sup>lt;sup>1</sup> An important observation here is that this expansion was partly due to the lowering of the pre-school entry age from three to two under the Berlusconi government (León and Pavolini 2014; Sabatinelli 2010).

cash allowance, which can be used to reward family caregivers. Of the four countries under study, Japan stands out in the absolute coverage levels. Soon after Germany introduced a new social insurance scheme for LTC, Japan followed suit in 2000 (Campbell and Ikegami 2000; Peng 2004). Japan today provides coverage rates well above the OECD average, while Italy, Korea and Spain fall below. The cut-off year of the early 2000s in Figure 2 results in an underestimation of coverage growth in Japan. In the mid-1990s, before the introduction of the LTC Insurance, the coverage rates for home help were well below 1%. Hence the coverage rates in Japan grew more than 10 times. Korea also introduced a new LTC Insurance (Choi 2014; Lee and Cho 2012; Estévez-Abe and Kim 2014). Although its coverage rates are not high in absolute terms, they increased 20 times during the 2000s. Italy and Spain, in contrast, show modest increases during the same period. Legally speaking, Spain is different from Italy. Spain made a big leap by introducing tax-financed universal access to LTC care (la Ley de Dependencia in 2006). However, the financial crisis has delayed its full implementation (León and Pavolini 2014).

As Oliver and Matzke (2014) point out, the Italian policy landscape was far from "frozen." In both elderly care and childcare, there have been numerous legislative initiatives and attempts at all levels of the government—including initiatives at regional and local levels in what has been labelled as a process of "modernization from below"

<sup>&</sup>lt;sup>2</sup> Own calculations based on the 1995 data taken from Aging Society White Paper (Cabinet Office 1997), Tables 1-2-2, 3-2-7, 3-2-9.

(Léon and Pavolini, 2014; Ferrera and Maino, 2014). However, Oliver and Matzke fail to show that some regions significantly expanded care provision.<sup>3</sup>

Table 1 summarizes the cross-national variations discussed so far. The policy trajectories in our four country cases show that policy developments in childcare and elderly care do not necessarily match even within the same countries. Our paper thus poses the following three questions:

- 1) Why did Korea and Spain expand childcare a lot more than Italy and Japan did?
- 2) Why did Japan and Korea make a bold step towards de-familialisation by socializing the cost of elderly care?
- 3) As already mentioned, although the onset of the financial crisis delayed the implementation process, Spain too introduced a dramatic change in the state's legal responsibility vis-à-vis elderly care. Why didn't a similar change occur in Italy?

[Table 1 around here]

# II. Beyond Existing Theories—Unresolved Puzzles

It is important to state outright that most studies of care do not necessarily frame the issue as "politics of familialisation." Very few have concurrently studied the politics of childcare and LTC together (see Schoppa 2008 for an important exception). Generally speaking, childcare has been treated as a subset of family policy. More recently, scholars have studied childcare as an element of family-work reconciliation policies that include paid leaves for parents, although not all such policies promote de-familialisation (Saraceno and Keck 2010). We have summarized the insights from the relevant existing

<sup>&</sup>lt;sup>3</sup> Their own data (Table 1 in their article) show a very stable level of childcare provision across all regions in Italy.

literatures both on childcare and elderly care into the following three types of causal arguments: (i) the magnitude of policy problems and policy pressures; (ii) party competition and cultural shifts; and (iii) economic concerns and strategies as drivers of policy shifts. Let's discuss each in turn.

# (i) The Magnitude of Policy Problems and Pressures

The literature on LTC tends to emphasize the magnitude of policy pressures as the main reason for policy shifts (Campbell, Ikegami and Gibson 2010; Pavolini and Ranci 2008, 2013; Theobald and Hempel 2013). Many governments face immense pressures as the number of frail elderly increased as a result of improvements in longevity. As Pavolini and Ranci (2013:3) note, recent policy developments in the field of elderly care have involved different types of policy changes ranging from "retrenchment and cost containment to a growth in public financing and an expansion of coverage." This emphasis on policy pressures is also seen in the literature on welfare reforms (Häusermann 2012, for instance). As Ferrera (2005) notes, policy problems do not automatically mean that solutions will be enacted, and many scholars have explored different political mechanisms.

#### (ii) Party Competition and Cultural Shifts

In contrast to studies of care, most studies of recent expansions in childcare and family-work reconciliation policies pay close attention to the interaction between party competition and the growing political importance of women in politics (Bonoli and Reber 2009; Fleckenstein and Lee 2014; Morgan 2013). However, authors vary in the causal emphasis given to the political role of women versus party competition. Here we can distinguish three different factors that scholars emphasize. Bonoli and Reber (2009) link

the presence of women in the parliament with specific policy outcomes, but fail to explain why. Other scholars emphasize the causal importance of party competition over female votes (Fleckenstein and Lee 2014; Morgan 2013). Morgan (2013:101) argues that the change in women's partisan preferences—precipitated by their greater educational investments and labour force participation—has created an opportunity for political parties to court female voters. Morgan's core argument, as we see it, lies in cultural shifts in women. In this sense, her work shares a similar view as Ferragina and Seeleib-Kaiser (2015), who see attitudinal shifts—and not partisan politics—as a major determining factor in family policies since the 2000s. The arguments reviewed so far are compatible with Häusermann's view. She highlights the importance of cultural values in new coalitional politics—in addition to interests—and suggests that interest and values might play out differently in reforms of "old social risk" programs and for the introduction of "new social risk" programs (Häusermann 2006, 2010).

### (iii) Economic Concerns/Strategies as Drivers of Policy Shifts

A number of scholars attribute the expansion of LTC and childcare to the ways in which economic and political actors have framed economic concerns and effective solutions. As Morel (2007) argues, "care policy reforms have been very closely linked to specific employment strategies.<sup>4</sup>" By employment strategies, she is specifically referring to the need in Bismarckian welfare states—Belgium, France, Germany and the Netherlands—to create jobs and labor market flexibility. She thinks that this strategy results in a mixed strategy of public provision and publicly-subsidized private provision

<sup>&</sup>lt;sup>4</sup>Bonoli (2005: 441) explains, "one of the consequences of better NSR coverage is to increase labor supply. In the current context of population ageing and, in some countries, population decline combined with difficulties in integrating immigrant populations, as increase in domestic labour supply is likely to be welcomed by business"

of care in Europe. Research by others' corroborates this view. Theobald and Hampel (2013), for instance, note how eager German private businesses were to support such a mixed strategy in elderly care. In her analysis of childcare policies in Germany and Austria, Leitner (2010) highlights the importance of the economic rationale that was used to justify the expansion of childcare as well the employers' support. Seeleib-Kaiser and Toivonen (2011), Fleckenstein and Seeleib-Kaiser (2011) and Fleckenstein and Lee (2014) also refer to the importance of the economic rationale in new social risks policies.

The three groups of causal arguments reviewed in this section all capture some aspects of the political dynamics of "de-familialisation of care." However, each, on its own, fails to account for the variations we are seeking to explain in this paper—as summarized in Table 1. Let us apply each of the arguments to our four cases to examine their validity and shortcomings.

First, if the magnitude of policy problems were the main causal factor, we would expect more significant reforms and care service expansion to have taken place in Italy and Japan. Japan has the oldest demographic structure, where 25% of its population are 65 or older 2013, followed by Italy's 20.9% and Spain's 17.9% (OECD Statists online). Korea is much younger: those aged 65 or older still form only 12.2% of the population. All four countries have extremely low total fertility rates —1.4 for both Italy and Japan, 1.2 for Korea, and 1.3 for Spain (OECD Family Database, SF 2.1.A. accessed on 11/11/2015), but the severity of demographic aging is much more serious in Japan and Italy. However, there was no LTC reform in Italy. Neither did these two countries expand childcare in a significant way. In contrast, the biggest change occurred in Korea.

However, the magnitude of policy problems can also be a function of the past policies, which produce strong feedback effects (Palier ed. 2010; Pierson 1993). Hence, we also need to consider whether past policies may have created bigger problems in some countries rather than in others. While they all shared strong familialism—meager care services by the welfare state—the pre-existing institutional context for frail elderly social policies was quite different. More specifically, the specific designs of health care and disability programs varied in ways that affected stakeholders' interests and their perception of policy problems. Japan was the only country with a highly fragmented social insurance-based health care system, which was coupled with a complicated fiscal transfer scheme. The other three countries, in contrast, had much more integrated health care systems. Korea was more contribution-based than Spain and Italy, and Italy had the most universalistic health care system. The degree of fragmentation and reliance on contribution affected how unions and employers would be sensitive to health care costs. Demographic aging pushes up the health care cost in any country, but, in familialist countries, the shortage of nursing care often leads middle class families to use hospital beds for the care of their elderly parents. Given how much more expensive medical care is relative to non-medical nursing care, this is a very expensive way of caring for frail elderly. The rise in cost is felt more acutely in fragmented contributory systems as it translates into higher contribution rates and/or co-payments (Kato 2010). In sum, different health care designs meant that cost sensitivity was highest in Japan followed by Korea, Spain and lastly Italy.

Furthermore, other related programs matter too. Italy is the only country of our four cases that had introduced a non-means-tested care allowance scheme for the disabled

(indennità di accompagnamento) as early as the 1980s (Da Roit et al. 2007). Today, about 70% of the recipients of this cash benefit (around 508 euro a month in 2014) consist of frail elderly who require assistance in their daily life. There is no restriction on how the money is spent. The cash transfer to the frail elderly in Italy encouraged a reliance on cheap migrant care workers easing the pressure on the government to intervene into LTC (van Hooren 2012).

Once we take past policies into consideration, we can see that "the magnitude of policy pressures" is indeed an important causal factor in explaining Italy's inaction in LTC reforms. However, this factor still does not explain cross-national differences in childcare. In childcare, the past policies made the policy pressure on Japan much more acute. In contrast to Italy and Spain, which had institutionalized universal access to childcare as a national educational policy long ago, Japan was the only country with no such policy. In spite of the acutest shortage of childcare facilities of the four countries under study, Japan has been very slow to expand childcare.

Let us now turn to the discussion of how well causal factors such as attitudinal shifts, female employment rates, female political representation and party competition explain the variations in our four cases. The preconditions for policy change considered by the authors in this camp have been very weak in Korea, but Korea is the country that demonstrates the most dramatic shift. Japan and Korea perform worst in every measure of gender equality—in employment, wages, gaps and political representation—among OECD countries (Estevez-Abe 2013; Ikemoto and Han 2014). Thus, the theories reviewed under the subheading (ii) would therefore expect expansions in NSR programs

to be smallest in Japan and Korea. However, on the contrary, Korea has expanded services more than any of the four countries.

Figure 3 shows cross-national variations in the same attitudinal variable (the harmful effect of maternal work on pre-school children) used by Ferragina and Seeleib-Kaiser (2015), who argue that it has a strong effect on expansion of family-work reconciliation policies. The strong belief in the harmful effect of maternal work in Korea—even if it has declined over time—is not compatible with Korea's dramatic policy innovation in defamilialising childcare. Spain, which has adopted big policy changes, has experienced a cultural shift much earlier; and cultural attitudes remained more or less the same in the period covered in Figure 3. Finally, attitudes in Japan and Italy, where childcare expansion has been very modest, are no more negative towards maternal employment than in Korea, Spain and Germany. Unfortunately, Fig. 3 only captures two time points with 20 years in between, because the question was only asked in two waves in Korea. Later in the paper, we will use a different but similar variable to show that a cultural shift in Korea did not precede policy changes.

Of the three groups of causal arguments considered here, the economic strategy thesis is the only one that does not contradict the cross-national patterns we seek to explain. The Japanese and Korean LTC insurance schemes as well as Korean childcare expansion all adopted the mixed strategy of public and publicly subsidized private provision of services. In both countries, the de-familialisation of care was perceived to be critical way of shifting labor from family care to creating new jobs (Campbell and Ikegami 2000; Estévez-Abe 2008; Fleckenstein and Lee 2014; Lee and Cho 2012; Yang 2015). In Spain, too, the LTC reform was explicitly framed as something that would

create jobs (Rodríguez and Marbán 2013). However, we are still left with two questions: why didn't Italy adopt an economic strategy, which was so successful in the other three countries? Why, in Japan, the economic strategy, which worked to push for a dramatic policy shift in LTC, did not work in childcare?

In sum, the literature, while providing helpful insights leave too many questions unanswered. We call for a new approach that embeds party competition in a macroinstitutional context.

# III. An Alternative Argument—Embedding Party Competition in an Institutional Context

We argue that preexisting institutional contexts shape the politics of defamilialisation of care in very specific ways. There are three types of "preexisting institutions" that constitute the overall context in which politics takes place. Our four countries possess different institutional combinations, which, we argue, explain why and how de-familialisation occurred or did not occur in each of them.

The first type refers to social policies that are already in existence, which we have already discussed in great details in considering how they affected the magnitude of policy pressures. Without having to repeat the same discussion, here we would like to emphasize how past policies affect the constellation of stakeholders their interests and how socio-economic changes will impact them (Palier ed. 2010; Pierson 1993).

The second type of institutions corresponds to the ways in which policy deliberation process is institutionalized. As the neo-corporatist literature has shown, countries vary in the extent to which how extra-parliamentary actors are incorporated into the formal policy process (Schmitter and Lehmbruch eds. 1979, et.al.). Institutionalized

channels of communication/deliberation among stakeholders can be, for instance, tripartite extra-parliamentary consultation bodies as in neo-corporatist systems. However, they need not be tri-partite.

The third type of institutions consists of macro-political institutions such as electoral rules, party systems, and government types<sup>5</sup>. While the third type of institutions has been part of the debate over whether (coalition-based) consensus democracies or majoritarian democracies favour bigger welfare states or not (Bawn and Rosenbluth 2006; Crepaz 1998; Persson, Roland and Tabellini 2007), we highlight their different effects. Our approach belongs to the new institutional analysis of welfare states (see a review article by Häusermann, Picot and Geering 2013). Let us elaborate on the second and third types of institutions further.

# Institutional Channels of Deliberation and "Problem-oriented" Policy Shifts

Institutionalized extra-parliamentary channels of policy deliberation and communication among all stakeholders and relevant bureaucracies create a possibility for political compromise otherwise difficult to achieve. When the stakeholders, who are negatively affected by socio-economic changes and share a desire to change the status quo, can come together, they might be able to negotiate over the specific details of the reform plan in a constructive ways. Even when negotiations are difficult, institutionalized extra-parliamentary negotiation channels have the possibility of continuing negotiations over a long period of time while parliamentary sessions end and governments change.

<sup>&</sup>lt;sup>5</sup> Government types, in turn, are partly conditioned by electoral and party systems

<sup>&</sup>lt;sup>6</sup> There is a vast amount of literature on this issue—i.e. the neo-corporatist literature and the varieties of capitalism literature.

When these stakeholders are also the key constituent groups of politicians and political parties, their agreement has a better chance of becoming a policy without much political drama. Their negotiations are more likely to influence policies when their "political representatives" possess decision-making power –more like in multi-party coalition governments, for instance.

In short, we associate the second type of institutions with what we call "problem-oriented" policy shifts in contrast to "election-oriented" policy shifts we associate with the third type of institutions. By "problem-oriented" policy shifts, we mean a "quieter" policy process where no visible politicization of the issue occurs. It is hence a policy process marked by cooperation rather than competition.

# Majoritarian Politics and "Election-oriented" Policy Shifts

By "election-oriented" policy shifts," we mean more politicized policy shifts that occur when political leaders take up a particular issue to mobilize voters. Some macromacro-political institutions are critical in shaping the nature of electoral contestation, because they affect the electoral pay-off of a successful electoral campaign. The electoral pay-off is greatest when the winning party can form a government on its own and can control the policy agenda. Therefore, we expect electoral competition to be more intense when there is a chance for an opposition party to seize power. These odds are a function of party systems and electoral rules (Cox 1990,1999). Yet, this does not complete the whole picture. Once the opposition party wins, it has to implement the policies it promised or it will be punished in the next round of elections. The incentive to implement promised policies is greater when the party can be easily ousted from power (Hallerberg and Basinger 1998; Strøm 2003). To ensure the linkage between electoral

promises and policy outcomes, it is important that the party leader has the power to control policy agenda. The following institutions are particularly important in shaping the institutional context of party competition: (i) majoritarian electoral rules; (ii) party centralization; (iii) the government stability; (iv) Prime Minister/President's constitutional agenda setting power; and (v) government type—i.e. single party majority, coalition, etc.(Laver 2008).

The combination of plurality rule with single member districts (i.e. first-past-the-post systems) are known to produce majoritarian parliaments, whereby two parties are likely to compete over power. However, proportional representation rules can favor large parties when district magnitude is sufficient small as it used to be the case in Spain until voters turned against the two biggest establishment parties (Hopkin 2005). Whether the party is centralized or not—in the sense of controlling nomination and the party's electoral platform—is also important (Carey and Shugart 1994). Unless the party is the unit of electoral competition and the leadership holds power to decide on the electoral strategy, policy-based contestation is unlikely. In other words, those political systems, where individual politicians run personalistic campaigns, are not likely to produce policy-based contestation between viable contenders to power.

The last three factors (iii)-(v), in turn, mainly affect what happens once the winner forms a government. Government stability is important because frequent government

<sup>&</sup>lt;sup>7</sup> Of course, as the Canadian experience shows, not all first-the-past-post systems produce majoritarian governments as it also depends on the effective number of parties. However, given the limited space, we proceed with a simple version of our analytical framework.

<sup>&</sup>lt;sup>8</sup> For the purpose of our argument, we are interested in party centralization as a unit of election rather as a legislative unity—although the two are not unrelated (Curini and Zucchini 2012). Kitschelt (2000) has a different argument about programmatic and clientelistic parties.

turnovers will disrupt the link between the winner's electoral mandate and the policy outcome. Even when the Prime Minister or President holds the *de jure* agenda setting power, if the government duration is uncertain, we can expect her *de facto* agenda setting power to be limited. The government type is also important. When Prime Minister presides over a single majority government, ceteris paribus, her policy capacity is greater than under a single minority or coalition governments (Budge and Laver 1992; Debus 2008; Laver 2008; Müller and Meyer 2010). Since the frequent government type is a function of the electoral rules and the number of effective parties, most party leaders are aware of whether she can expect to form a majoritarian government or will need coalition partners. Hence this factor also forms part of her calculated electoral pay-off of a successful electoral bid.

In short, we can expect when policy-based electoral competition will be most fierce. The institutional contexts in Korea and Spain, we argue, favor intense policy-based contestation. It was this policy-based electoral contestation that incentivized the political leaders in these two countries to go after not only de-familialisation policies but also value-based policy shifts such as revising the family law and introducing highly symbolic gender equality laws.

#### [Table 2 around here]

Korea and Spain have experienced more decisive and stable alterations of power (Table 2, Columns I and III). A party, once in power, enjoys longer periods of uninterrupted rules. Note that Korea is the only presidential system in our sample, where

<sup>&</sup>lt;sup>9</sup> Frequent government turnovers, in turn, might be caused by frequent national elections, breakdowns of coalition governments, party leader's weakness vis-à-vis her party (Huber and Martinez-Gallardo 2008; Laver 2008).

President is elected directly from popular vote for one five-year term (re-election is forbidden). Although political parties in Korea are not centralized, and often split and merge and change their names, the Presidential election is a highly majoritarian race, because there is only one winner. The race is often a two-candidate race, and, constitutionally, the winner is endowed with the agenda setting power—unlike the US President (Estevez-Abe and Kim 2014). In Korea and Spain, as Column II indicates, government changes only when the President/Prime Minister ends its term or loses a national election.

Italy and Japan, in contrast, have been quite different: each government was much more short-lived (Table 2, Column III). Governments tended to be coalition-based and changed more frequently. Yet, there are importance differences between Italy and Japan. During the 2000-2013 period, the conservative coalition ruled Japan except for a two and a half year-interruption between 2009-2012, while Italy experienced more frequent alternations in power between center-left and center-coalitions. A credible threat to the dominant conservative party's hold on power has rarely existed in Japan except for a brief period in the latter half of the 2000s. Even if we extend the period coverage and include the 1990s, the overall picture does not change. Although the Italian party system is more fragmented than in Japan (see Column IV), the practice of pre-electoral alliances in Italy has allowed political parties to form two camps for electoral purposes since the electoral reform in 1993 (Bardi 2007; Katz 2005; Bartolini et al. 2004).

We argue that these differences are responsible for producing very different political dynamics in our four cases. In Korea and Spain, voters know that the winning party sets policies for several years to come. This encourages more intense policy-based

competition between the parties at every election cycle. Government stability and the concentration of agenda-setting power in the hands of the government means that electoral pledges are more likely to become policies in Korea and Spain.

In contrast, in Italy and Japan, even when an intense policy debate arises at the election time, frequent government changes and the coalitional nature of most governments weakens the link between electoral promises and policy outcomes. Furthermore, much lower unionization rates in Korea and Spain compared to Italy and Japan also means that the more left-leaning parties had to mobilize unorganized voters (see Introduction in this issue).

## V. Evidence from Process Tracing

This section demonstrates how the politics of defamilization in Korea and Spain took the form of election-oriented policy shifts, framed as part of a broader political change brought by the ruling party. Political contestation on the basis of big ideas did not occur in Italy and Japan. However, it does not mean that no policy shift can occur. The big policy shift in LTC in Japan followed a different dynamics aided by the second type of political institutions.

#### Electoral Mobilization and Politics of De-familialisation in Korea and Spain

In South Korea, the strongest majoritarian tendencies come from Presidential elections, as the winner becomes the sole head of the government with strong agenda setting power. The first Korean president from the opposition party, Kim Dae-Jung (1998-2003), won by mobilizing voters' discontent in the post-Asian financial crisis. He rode to victory by promising more welfare benefits and services (see Sacchi and Rho in this issue). In addition to strong support from his region, he had the support from

progressive voters and activists (many of whom had fought for the democratization of Korea in the 1980s). After he came to power, Kim Dae-Jung created a Ministry of Gender in 2000, and brought feminists—his supporters—into the policy circle (Estevez-Abe and Kim 2014). The direct mandate from the President provided these new so-called femocrats with political capital. As a result, gender issues and NSR particularly pertinent to women gained bureaucratic attention. It is worth noting here that innovative and highly symbolic policies such as gender quotas were also legislated during this period—although the law was not strictly enforced (Yoon and Shin 2015). We can see that policies that promise big societal change were effective electoral tools in Korea.

Yet it was another progressive President, Roh Moon Hyun (2003-2008), who introduced path-shifting policies in favour of defamilalisation of care (Baek et al. 2011; Song 2010). Roh, who lacked the strong regionally based support of his predecessor, saw policy-based electoral mobilization as a necessity (Fleckenstein and Lee 2014). During his presidential bid, he promised to expand childcare as well as LTC services (Yang 2015: Chap 6). Once elected, he introduced a very ambitious childcare-doubling plan (Saessak Plan), and legislated LTC insurance (for childcare, see Estevez-Abe and Kim 2014; Fleckenstein and Lee 2014; and for LTC, Choi 2014; Lee and Cho 2012).

While President Kim was the first to set up a Presidential Commission to consider a major LTC reform, his main reason for doing so was to contain health care costs (Lee and Cho 2012). As already discussed in Section II, a shortage of nursing care services led families to use hospitals, which is a very expensive alternative. Given the contributory nature of the Korean health care system, the resulting rise in health costs became a serious policy issue. Yet, under Roh's Presidency, the LTC reform was not

merely treated as "problem-oriented" policy shift. As Soma (2012:91-92) demonstrates, the de-familialisation of care in both childcare and elderly care were embedded in Roh's broader "The First Healthy Family Plan" (2006), which considered gender equality within and outside of the family to be an important component of a better family life. In fact, the Roh Government's Family Plan also called for eliminating patriarchal elements form the civil law (ibid.) Moreover, the gender quota was revised and effectively implemented in the national elections in 2004 during Roh's tenure as President (Yoon and Shin 2015). The percentage of women in the parliament began to increase after 2004. We can thus see that the Roh's policy agenda aimed at mobilizing against, as it were the Old Korea.

This process was different from the authors in the "cultural shift" assume. While they assume that women's increased presence in the parliament and their preference changes precede policy shifts, that is not what happened in Korea. In order to better capture attitudinal shifts than Figure 3, Figure 4 uses a related variable—belief that being a housewife is as fulfilling as working for pay. Here we see that a big shift came after—and not before—Roh's Presidency.

# [Figure 4 around here]

When Roh's term ended, his conservative successors adopted pro-defamilialisation policies. Lee Myung-bak, the conservative presidential candidate, pledged to provide universal childcare for all preschool children during the presidential election campaign. While President Lee (2008-2013) only implemented the first step (universal care for 0-2 year-olds), his successor, another conservative President, Park Guen Hye implemented universal childcare. Universal childcare was a big electoral issue, which both Park and her opponent made the pledge to implement. Again it is noteworthy that it was under the Conservative President, Lee Myung-bak (2008-2013) that the family law was reformed to eliminate the remaining patriarchal elements. We see how the majoritarian electoral dynamics combined with the President's strong agenda setting power has been conducive to value-based mobilization, which benefited Korea's push for de-familialisation of care.

Of course, this is not to say that the Korean Presidents ignored societal and economic groups. De-familialisation of care was framed in such a way as to cultivate political support. It was not a coincidence that Korea opted for the private provision of formal care services in both childcare and LTC. The government used the economic rationale of creating new service sector jobs and of activating female labor in the context of a shrinking population—something that was supported by businesses and economic bureaucrats as well (Fleckenstein and Lee 2014 for childcare). This is similar to what Morel (2007) has observed in Europe.

We observe a similar dynamic in Spain. There was a policy-based mobilization where de-familialisation of care and progressive value-issues were concurrently pursued. For most of the period under study here, Spain was characterized by majoritarian electoral and party dynamics. The two major parties—PSOE and PP—alternated in power (Hopkins 2005). The PSOE (in power 1982-1996 and 2004-2011) played a critical role in seizing upon gender equality as a value issue to mobilize voters against the PP. In 1988, PSOE, in its attempt to remain in power, adopted an offensive strategy: the party implemented a gender quota to contrast itself to the Catholic patriarchal PP. The conservatives (PP) responded to the challenge by also embracing a gender quota for fear

of appearing too patriarchal. Consequently, the percentage of female politicians in Spain reached almost to Nordic levels. Felipe Gonzalez's PSOE government (192-1996) also created the Instituto de la Mujer (Women's Institute) at the national as well as local levels, and institutionalized "femocrats"—in a similar way as President Kim in Korea. In 1990, the same Gonzalez government also universalized access to preschools as a way of partially defamilialising childcare (The Education Law of 1990 --LOGSE).

When the PP led by José María Aznar seized power in 1996, it did not roll back PSOE's gender equality policies. Instead, it pursued de-familialisation policy with a conservative touch by promoting publicly subsidized private care services. Recall that the Korean conservative Presidents opted for similar policy tools. Aznar's National Plan for Family Support aimed at promoting women's entry into the labor market. In 2002, Aznar introduced a monthly tax-benefit for formally employed mothers with children under age three as a way of subsidizing childcare costs. The sum of tax subsidy was around 100 euros a month, which is equivalent to around 1/3 to 1/4 of the price of a full-time childcare place with a meal service (León 2011). This policy specifically targeted working mothers, who tended to be better educated than non-working mothers. This approach contrasts with the tax-financed provision of formal services favored by PSOE, which suggests partisan differences in preferred policy options.

The big push for de-familialisation occurred when the PSOE (led by Zapatero) came back to power (2004-2011). The Zapatero government pledged to create a National System of Care for Dependent People (Sarasa 2011: 249; Rodríguez and Marbán 2013). Again the process was very similar to Korea. Under the contributory

<sup>&</sup>lt;sup>10</sup> Some Autonomous Communities provided supplementary tax deductions and direct benefits exist in order to subsidize the use of private childcare services.

health care insurance, in Spain, the use of medical services in lieu of nursing services was proving to be very expensive and some form of cost containment was needed (Rodríguez and Marbán 2013:205). The reform of LTC had been on the agenda from the 1990s, and the PP government had kept it on the agenda but as a low priority issue (Rodríguez and Marbán 2013). The abrupt change came when, in its effort to seize the power back from PP, PSOE included it as a high priority issue in the 2004 elections (ibid.). The PSOE advocated both a tax-funded design—as demanded by the employers, who did not want to shoulder any more social security contribution—and formal care services over cash benefits—as demanded by the unions who wanted to create jobs (Rodríguez and Marbán 2013). The ambitious LTC reform, La Ley de Dependencia (2006), had a social democratic design promising universal access to formal care services. In addition, 2008 the national government created the *Plan Educa3* with an aim to increase public childcare services for children aged 0 to 3 year (León 2011).

As in Korea under Roh, the overall policy agenda aimed to make a big political splash. The big LTC reform and the childcare expansion were legislated as Zapatero introduced a series of high profile policies to change the legal system surrounding the family such as legalization of gay marriage (2005) and the National Equality Law (2007) (León 2011: 67-68). León (2011:69) interprets the LTC reform in 2006 as the first official recognition of the gendered nature of care. However, regardless of the government intention, both the new LTC and the childcare expansion policies were not fully implemented because of the Eurozone crisis that severely limited the government expenditures in Spain (León 2011; León and Pavolini 2014; Aguillar and Hendrickson 2014).

# Relative Absence of Election-Oriented Policy Shifts in Italy and Japan

In Italy, two broad alliances—center-right and center-left—competed against each other under the post-1993 electoral system, which had introduced a majoritarian element into Italian politics (Bardi 2007; Katz 2005, Bartolini et al. 2004; Donovan, 2001). This led to the emergence of various important policy initiatives. The Center-left governments (1996-2001) introduced new innovative family policies giving regions more resources for children's development (Act 285/97), bringing third sectors in social service provisions (Act 328/2000), and introduced a brief paid paternity leave (parental leave reform, Act 53/2000) (Naldini and Saraceno, 2008; Da Roit and Sabatinelli, 2013; Léon and Pavolini, 2014). Clearly, there was an attempt to mobilize along gender and family policy lines. The center-right government by Berlusconi (2001-2006) also responded to childcare needs, but in a different way. Instead of expanding governmental investment in early childcare facilities for children aged 0-2, it opted for a legal reform to lower the entry age into pre-schools from 3 down to 2 as a way of extending the statutory childcare coverage. It also promoted the role of enterprises (employers) in providing childcare for children under age 3 thereby supporting working mothers. Another center-left government, albeit short-lived (2006-2008) introduced a National Extraordinary Crèches Plan—a plan to invest about 800 million euros (with one-third of it to be co-funded by regional authorities) (Riva 2015). The target was to create 65,000 childcare places –equivalent to an increase of roughly 4% of the number of places for children under 3 (Sabatinelli 2010). The most recent center-right government (2008-2011), however, chose to pursue a different policy path.

In sum, we observe the germs of gender-based mobilization in Italy, even if this mobilization never took off. It certainly fell short of the kind of gender-based mobilization that occurred in Spain. Unlike in Spain, where one party could claim political credit, Italian center-left governments were multi-party coalition governments. In that context, making high stake policy shifts would not generate clear electoral gains for any specific party in the next round of elections. Furthermore, governments changed much more frequently than in Spain, thereby limiting the policy impact of electoral winners. Thus although political leaders were clearly interested in gender/familialisation issues, no major value mobilization nor big bold policy shifts occurred. Furthermore, the agenda setting power was much more limited in Italy because of the role played by the strong constitutional court. The Italian center-left was interested in promoting gender equality issues, and, like their Spanish counterparts, they pushed for a gender quota in politics. However Italy's strong constitutional court in 2003 struck it down as unconstitutional (Montalti, 2003).

Compared to the other three cases, electoral mobilization was weakest in Japan. The dominance of one party—the conservative Liberal Democratic Party (LDP)—has a lot to do with it: the opposition parties were rarely credible contenders to power except for a few years in the late 2000s. That said, when a group of LDP members left the party, ousted the LDP government by means of a successeful non-confidence vote, and formed the first non-LDP multi-party coalition government in 40 years in 1993, politics did change (Reed and Thies 2001;Estévez-Abe 2006). The first non-LDP government, although very short-lived, put new gender equality and childcare issues on the agenda in its attempt to seek electoral support from those voters who were frustrated with the long

LDP rule (Peng 2002). However, the first non-LDP government fell apart before the first budgeting season was completed. The LDP came back to power by successfully persuading some parties to abandon the non-LDP coalition and to join forces with the LDP. The LDP-led coalition governments that followed absorbed some of the non-LDP government policies, including the Council of Gender, the Gender Equality Plan, the Gender Equal Society Plan and a childcare expansion plan called the New Angel Plan—named after the previous government's Angel Plan (Peng 2002). However, this was done more out of coalition dynamics and not from the LDP's strategy to mobilize voters on gender equality issues as it was the case in Korea and Spain.

Like Italy, Japan too reformed its electoral system in a majoritarian direction by introducing a mixed system of proportional representation and first-past-the-post system with single member districts in 1994 (Shugart and Wittenberg 2001; Katz 2001; Reed and Thies 2001). However, it took a long time for the fragmented opposition parties to form a common front against the LDP. Because the Italian-style pre-electoral alliances did not exist in Japan, competition between two major alliances—center-right versus center-right—that emerged in Italy soon after the electoral reform did not emerge in Japan until much later. The delay in the emergence of a credible contender party to the LDP meant the LDP remained the only viable option as a governing party, thereby reducing the impact of policy contestation during elections. Frequent changes in Prime Ministers and frequent reshuffling of cabinet positions also blurred the link between electoral pledges and government policies.

A real competition only emerged in the mid-2000s, when a number of opposition parties merged to create the Democratic Party of Japan (DPJ), a center-left party.

Electoral competition became more policy-focused (Estevez-Abe 2006). When the DPJ finally seized power in 2009, it tried to cut the generous tax deductions for male breadwinner headed families in order to fund NSR programs. However, yet again, this non-LDP government only lasted for three years. Its electoral defeat in 2012 and the subsequent fragmentation of the party system significantly reduced political competition in Japan.

## **Problem-Oriented Policy Shifts: The LTC Insurance in Japan**

Japan's major policy shift that resulted in the LTC insurance did not happen in the same way as care services were expanded in Korea and Spain. For the reasons already mentioned in Section II, the Japanese highly fragmented contributory health care system made unions and employers highly conscious of rising costs of health care. The Ministry of Welfare, aware of the systemic policy pressure, began to seek ways to promote nursing and home care services in the early 1990s (Campbell and Ikegami 2000; Nichii Soken 1997, Estévez-Abe 2008: 247-251). Governments changed so frequently from one coalition to another, but the Ministry used its deliberation councils (shingikai) to keep the negotiations going. These councils involved all stakeholders in elderly welfare and health care policies and served as an arena where they met and deliberated on the ministerial proposals. Stakeholders included: municipal welfare agencies; municipal governments; municipal healthcare insurance funds; occupational health care funds; employers and unions—all of whom were negatively affected by the rising health care cost of the elderly. The goal was to introduce a new insurance scheme, which also the elderly would contribute to as a way of sharing the burden of aging society.

The Ministry used the existing channels to build and share a particular understanding of the care crisis. The government predicted that prime age workers--even men—would need to interrupt work to care for their parents. For the business world, the Ministry framed the problem as an opportunity to promote the growth of new industries—private care services and related care equipment industries (Estévez-Abe 2008: 247-251). The Ministry was very keen on promoting private services as a way of getting businesses interested in the economic prospects of "LTC industry," which was beginning to grow (*Nihon Keizai Shinbun* March 9, 1995, 38; April 7, 1995, 27). The Ministry, fearful that cash allowance to family care would stifle the growth of formal services and be too costly, preferred not to provide such cash allowance (Campbell, Ikegami and Gibson 2010).

The negotiations among the stakeholders continued for several years as different governments came and went until the new LTC Insurance became a law in 1997, which was implemented in 2000. The fact that broad coalition governments ruled Japan during the mid-1990s also aided the politics of cooperation. As Estévez-Abe (2008) demonstrates, this period was a unique period in Japan, during which a few major NSR policies were introduced.

In Italy, no major reform in LTC took place. Since the 1990s, governments attempted to retrench the pre-existing carer's allowance and divert the resources to build public service provisions for LTC. In 1997, for instance, the Onofri Commission recommended the introduction of a LTC system (León and Pavolini 2014). Of course, retrenchment of a popular non-means-tested cash benefit is always difficult (Ranci et al. 2008; Da Roit and Naldini, 2010; Da Roit and Sabatinelli; 2013). But it is not impossible.

Unlike in Japan, the highly universal nature of the Italian health care system did not give rise to a constellation of stakeholders that would be the government's ally in retrenchment and recalibration.

#### VI. Conclusion

This paper has demonstrated that specific institutional contexts matter in shaping different types of politics of de-familialisation of care. In doing so, we have emphasized the importance of macro-political institutions. Our aim is to demonstrate the need for a more nuanced understanding of the overall political context under which governments take on difficult tasks of welfare state recalibrations. As Häusermann (2006, 2012) points out, value-based coalitions might be particularly relevant to care issues as we have demonstrated. We do not deny that there have been important cultural and attitudinal change—especially since socio-economic changes have brought about an important change in party systems (Mair et al. 2004). As some scholars have noted, political mobilization of women can be important. However we want to emphasize that political parties do not respond to cultural shifts in an institutional vacuum. Mobilization strategies are contingent on having institutions that favour electoral contestation where parties rally voters on the basis of new policies. We have shown how both the electoral context and the government structure matter in linking electoral competition and policy outcomes in a credible way.

Importantly, as Japan's successful introduction of a major innovation in LTC shows, the politics of de-familialisation can also take place in the form of less visible persistent negotiations. Although our cases are limited to four, the institutional variations

within the cases, have allowed us to explore a new institutional logic of NSR policies. The logic suggests that, if the majoritarian political dynamic strengthens in Italy and Japan, these two countries are also likely to move in the direction of Korea and Spain, whereby two camps will try to mobilise voters on policy-based contestation.



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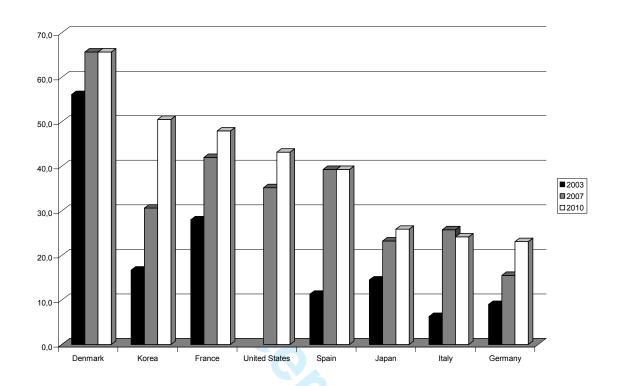
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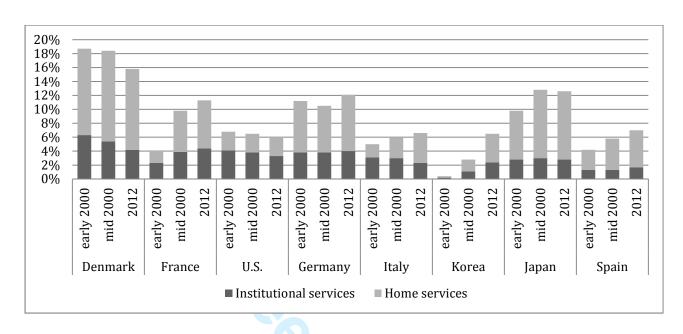
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Figure 1 Enrolment rate of Under 3s in formal childcare



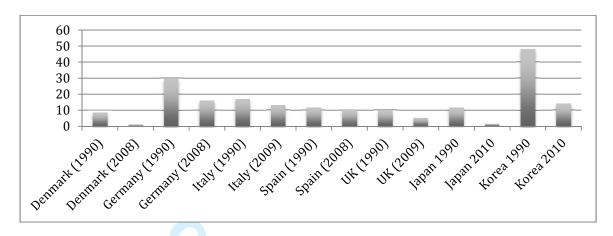
Source: OECD Family Data Base

Figure 2. LTC Coverage rate pop. over 65, early 2000-2012



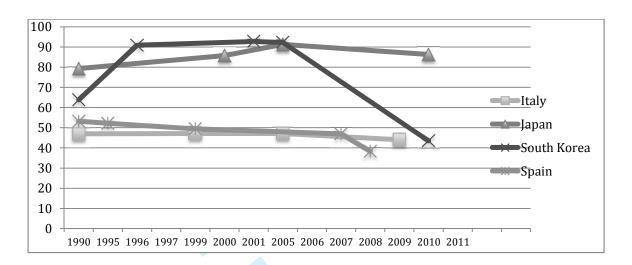
Source OECD. Variables: *LCT recipients at home* and *LTC recipients in institution (other than hospital)* Note: Italy: Home care, source Italian National Institute for Statistics (Istat); Spain: Home care early and mid 2000 source IMSERSO; Residential car: early 2000 source INE (Spanish Statistical Office); Denmark: coverage rate of institutional services early 2000 estimated from ESSPROS; Japan and US data for home care 2012 refer to 2011, source http://www.oecd.org/els/health-systems/good-life-in-old-age.htm#CountryNotes.

Figure 3. The percentage of women who strongly agree that preschool children suffer when mothers work for pay in selected OECD countries



Source: European Values Survey and World Values Survey Only two waves were available for Korea for this particular variable.

Figure 4. Attitudes on Being a Housewife (Female Respondents)



Source: European Values Survey and World Values Survey, Being a housewife is as fulfilling as working

Table 1. A Comparative View of Changes in Elderly care and Childcare Policy in Italy, Korea, Japan and Spain, 2000-15

	Third Order	Trend in	Third Order	Trend elderly
	Change	childcare	Change	care services
		coverage in 2000 and 2013		coverage in 2000 and 2013
Italy	No	An expansion between 2003 and 2007, but then no change	No	Minor increase
Korea	Universal free access to childcare place 2012 (for 0-2 year-olds) 2013 (for 0-5 year-olds)	A three-fold increase Above the OECD Average	Long-Term Care Insurance decided in 2003 implemented in 2008.	A twenty-fold increase (while absolute levels still low)
Japan	No	Very modest increase throughout the period	Long-term Care Insurance legislated in 1997 and implemented in 2000	A ten fold increase Above the OECD Average
Spain	2008 (Plan Educaion 3)*	A four-fold increase	Universal access to elderly care (La Ley de Dependencia in 2006)*	Minor increase

Table 2. Insitutional Context of Party Competition

	I Number of governme nts (2000- 2013)	II Prime Minister/ President serves full term	III Dominant Governmen t Type during 2000-2013	IV. Effective Number of Parliamentary Parties Range between largest and smallest values 2000-2013	V Electoral System in (When bi- cameral, the Lower Chamber)	VI Party Centraliza tion	VI Constitution
Italy	7	Not always	Coalition	3.52 (2013)~ 5.45 (2000)	(1933-2005) SMD-PR Mixed System (post-2005) PR	Weak	Parliamentary
Japan	13	Not always	Coalition	2.10 (2009)~ 3.17 (2000)	Post-2004 SMD/PR— Mixed System	Weak for DPJ Stronger for LDP	Parliamentary
Korea	5	Always	Single Party	2.28 (2012)~ 2.93 (2008)	SMD/PR Mixed system Presidential election is <i>de</i> <i>facto</i> SMD	Weak	Strong Presidential (elected by nation-wide popular vote)
Spain	4	Always	Single Party	2.34 (2008)~ 2.61 (2011)	PR	Strong	Parliamentary

Source: For Columns I, II, III, IV, Armingeon, Klaus, Christian Isler, Laura Knöpfel, David Weisstanner and Sarah Engler. 2015. *Comparative Political Data Set 1960-2013*. (Bern: Institute of Political Science, University of Bern). The data on Korea have been provided by Jae-jin Yang, Yonsei University.