# **Work-Family Policy Expansion and the Idea of Social Investment: the cases of Germany, England, South Korea and Japan**

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## Introduction

Since the late 1990s many OECD countries have introduced work-family reconciliation policies aimed at enabling families, and women in particular, to more easily balance the demands of employment and childcare. To this end, early years education and care (ECEC) services as well as childcare leave policies have been expanded across welfare states of different traditions and institutional origins, including, notably, East Asian welfare states (An, 2013; Ferragina and Seeleib-Kaiser, 2015; Daly and Ferragina, 2018).

Comparative explanations of this shift have highlighted a number of ‘new social risks’ that are facing modern welfare states (Bonoli, 2005). First, the decline of permanent, full-time employment that characterised industrial economies has eroded the feasibility of the ‘family’ wage which underpinned many states’ support of the male-breadwinner model family (Lewis, 1992). Second, a growth in women’s employment, which has occurred to different extents in different countries, has both responded to this need for higher family incomes but also to women’s demands for inclusion in the public realm (Lewis et al, 2008). Third, the shift to service sector-dominated economies has placed a premium on skills and education, which are increasingly vital for labour market success in a globalised, knowledge economy (Bonoli, 2007). Fourth, there has been a decline since the 1970s of birth rates across high-income countries, a trend which has exacerbated the fiscal and social strains presented by demographic ageing (Castles, 2003). These challenges have created new demands for policies which support women’s employment, improve education and address falling birth rates (Mätzke and Ostner, 2010a).

In attempting to meet these challenges, many countries have followed the example of social-democratic welfare states, which had introduced work-family policies in earlier decades (Leira, 1992; Ellingsæter and Leira, 2006). In particular, this has involved increasing the availability, affordability and quality of ECEC and introducing or redesigning parental leave policies, in order to encourage mothers to maintain labour market attachment after childbirth. Both the pioneering expansion in social-democratic countries and the more recent changes elsewhere have therefore been understood as constituting a shift away from norms and assumptions based on male-breadwinner model families that have underpinned social policy in most countries since the foundation of modern welfare states (Lewis, 1992). Instead, policies are now based on an assumption of an ‘adult worker model’, in which all adults are participants in the labour market (Lewis, 2001; Orloff, 2006; Daly, 2011).

As such it can be claimed that the changes mark a ‘path departure’ in many welfare states away from traditional approaches to family policy. Yet while expansion has been the rule across OECD countries, there is significant variation in approach (Mätzke and Ostner, 2010b; Ferragina and Seeleib-Kaiser, 2015). Countries vary in the design of their work-family policies, including, inter alia, the length and level of remuneration of parental leave, the amount of leave reserved for fathers, the extent of support for childcare costs, the public-private mix of ECEC provision, the level of universality or conditionality of ECEC provision, and the age at which children qualify for ECEC provision. If social democratic countries pioneered a model of family policy, variation in the constitutive aspects of this model means that the ‘latecomer’ countries differ in the extent to which their policy packages have followed the pioneers’ example. This variation raises the question of what determines how far different welfare states have shifted towards a ‘social democratisation’ of family policy.

Most of the relevant comparative literature has focused on the ‘path-breaking’ nature of the reforms, and seeks to explain how change came about (for example Morgan, 2013; Fleckenstein and Lee, 2014; Estévez-Abe and Naldini, 2016; León et al, 2019). This chapter takes a different approach. It examines *variation* in the trend of work-family policy expansion, by exploring the reforms in four ‘latecomer’ countries: Germany, England, South Korea and Japan. These countries were all ‘strong male breadwinner’ countries, implicitly or explicitly, in which the state has historically had little or no role in how families brought up their children, beyond provision for those in need (Hantrais, 2004; An and Peng, 2016). However, this situation has fundamentally shifted since the expansion of work-family policies; in each of these countries there is now an acceptance that the state is responsible at least in part for the education and care of pre-school children. Thus, the four countries are emblematic of the wider trend of work-family policy expansion, yet they provide a breadth of cases that are appropriate to the investigation of variation within the broader trend. They represent a mix of conservative-corporatist (Germany), liberal (England) and East Asian welfare states (Korea and Japan), which combine elements of both conservative and liberal welfare states (Kwon, 1997; Esping-Andersen, 1999).

The ideational literature has highlighted that a major advantage of taking ideas seriously as explanatory variables is that they can serve to illuminate the content as well as the direction of institutional change (Béland, 2009). Underpinning many of the rationales for expansion of work-family policy has been the idea of social investment. The argument put forward here is that the different ways in which work-family policies expanded in these four countries can be related to the content and use of the idea of social investment in the respective countries. Drawing on the concepts of ‘polysemy’ and ‘coalition magnets’ from the ideational literature, it is argued that in Germany and Korea, the social investment discourse was broader and more ‘polysemic’ in terms of what investment could achieve, whereas in England and Japan social investment was discussed in narrower terms (Béland and Cox, 2016). This led to the idea of social investment in work-family policies being a more successful ‘coalition magnet’ in the former two countries, as it was able to attract support from a wider selection of powerful actors. The result was that there has been more political consensus about work-family policy expansion in Germany and Korea, which has led to more sustained and consistent expansion in these two countries, and thus a more dramatic ‘path departure’ than in England or Japan, where elements of path dependence are more evident.

The chapter proceeds as follows. The next section reviews the literature on discourse and ideas, with a particular focus on the concept of ‘social investment’. It concentrates on the main theoretical concepts outlined above: polysemy and ideas as coalition magnets. The third section examines the use of social investment discourse in each of the cases and relates it back to the discussion of polysemy and coalition magnets; it focuses on the ways in which policymakers defined the relevant policy problems and policy goals of work-family policy expansion. The final section offers some conclusions and suggestions for further research.

## Social investment, polysemy and coalition magnets

The social investment perspective represents a different approach to social policy to the social protection focus of post-1945 welfare states and the residual, safety-net approach of neoliberalism (Morel et al, 2012a; Gingrich and Ansell, 2015). Social investment involves using state resources to improve individuals’ resilience against social risks, rather than as compensation for them. Such use of resources, the perspective argues, is beneficial for the individual but also for society as a whole. As such, the concept of social investment has been central to calls for expansion of work-family policies; indeed, such policies are an archetypical example of the social investment perspective (Morel et al, 2012b; Hemerijck, 2017). The ‘investment’ in them brings a number of potential benefits both individually and collectively. First, they are key to raising maternal employment rates, especially for single mothers. Maternal employment increases the labour supply, the available skills to the economy and potential tax revenue and is also considered to bring long-term benefits in that it helps prevent children growing up in poverty, which is damaging for future life chances (OECD, 2006; 2007). Second, ECEC services represent an investment in human capital. Quality pre-school education is related to better school-readiness and therefore better outcomes throughout school education (OECD, 2017b). Furthermore, early education is also associated with better social outcomes in the longer term, particularly for children from disadvantaged backgrounds, which implies significant savings for the state in future (Heckman, 2006). Third, investment in ECEC is part of a skills agenda enabling countries to transition towards the ‘knowledge economies’ of the future (Lister, 2003). Fourth, leave policies have also been seen to be important in maintaining mothers’ labour market attachment after childbirth, which avoids skill depreciation which can occur with long periods away from employment. This is especially relevant given the high levels of education women are achieving across many high-income countries (OECD, 2017a). Finally, work-family policies have also been related to the issue of falling birth rates and demographic ageing, with analysis showing that countries with extensive work-family reconciliation policies are those where the birth rate has remained near the replacement rate (Thévenon and Gauthier, 2011).

Social investment therefore is a multifaceted idea within which different elements can be brought to the fore and behind which there is not necessarily a shared consensus on a single meaning. For example, Jenson (2010) has shown that the ‘social investment state’ called for by Giddens (1998) which would invest in human and social capital was more limited and supply-side focused than the ‘child-centred social investment strategy’ of Esping-Andersen et al (2002). This ambiguity has acted as a ‘mechanism of diffusion’ for the overall idea of social investment: through its promotion by academics and international organisations, the concept has spread to countries with very different social, political and ideological contexts (Jenson, 2010). As well as being beneficial in diffusing ideas across borders, ambiguity has also been shown to be a powerful trait that can improve an idea’s political fortune. For example, Hall’s (1989, p 367) work on Keynesianism notes that the inherent ambiguity of Keynesian ideas ‘enhanced their power in the political sphere. By reading slightly different emphases into these ideas, an otherwise disparate set of groups could unite under the same banner.’ Similarly, Schmidt and Thatcher (2013, p 27) argue in relation to neo-liberalism that ‘[t]he very generality and plasticity of neo-liberalism, which make the concept seemingly amorphous and difficult to define precisely, are key reasons for its resilience.’ These examples use a number of different terms (ambiguity, generality, plasticity) to capture the fundamental concept, which Béland and Cox (2016) have labelled ‘polysemy’. The ideational literature has argued that polysemy is a key feature of politically successful ideas as it enables the idea to function as a ‘coalition magnet’. That coalitions may contain internal variance in their interpretations of central ideas has also been noted in the policy analysis literature. This literature has highlighted that the wider a potential set of interpretations, the broader the potential coalition around those interpretations can be, and therefore the more likely it is to lead to some form of policy change. Empirically, this feature has been shown to important in social policy change (Baumgartner and Jones, 1993; Sabatier and Jenkins-Smith, 1993). In his account of French welfare state reform, Palier (2005, p 138) finds that ‘ambiguous agreement’ is a key feature of policy change, arguing that ideas which can ‘aggregate different—and even contradictory—interests, based on different, and sometimes contrasting, interpretations of the consequence’ are a crucial feature of change. It is reasonable to conclude therefore, that in general, ideas which are polysemic will be those that are able to attract the broadest support: they will function more strongly as coalition magnets than those which are more narrowly defined.

The polysemic character of ideas has two implications for comparative analysis. First, that internationally diffuse ideas may appear with different emphases in different countries (Béland, 2009). Ideas are influenced by a wide set of factors including political circumstances, national normative traditions, institutional structures and policy trajectories (Campbell, 2004; Schmidt, 2006). Second, in this cross-national variation, the level of polysemy is also likely to vary. In some countries an internationally polysemic idea may retain a breadth of meaning whereas in others a narrower version of the same idea may be dominant. This is likely to be linked to the political fortunes of that idea: as noted above, the broader a coalition that can coalesce around an idea, the more likely it is to achieve its aims.

The empirical cases explored in the next sections highlight how these concepts can help explain variation in policy change. In each case, the analysis focuses on the initial period of reform and on the ways in which government documents and politicians referred to work-family policies. First, they show that the polysemy of social investment ideas means that the discourse around the expansion of work-family policy has varied in the four countries, and in particular, was more polysemic in Germany and Korea than in England and Japan. Second, they demonstrate that the countries in which the local version of social investment was more polysemic have seen a broader political coalition coalesce around reform to work-family policies. And third, that the countries which have a broader political coalition for reform of work-family policies have indeed seen a more coherent and sustained expansion of these policies, and thus a more dramatic path departure.

## Germany

With its employment-based social insurance schemes and strong focus on status preservation, the (west) German welfare state was the archetypical ‘conservative-corporatist’ welfare regime (Esping-Andersen, 1990). Central to this was the notion of subsidiarity, in which welfare provision was centred on providing a male, industrial worker with a ‘family wage’ and relying on the family for the provision of care. Germany’s welfare state therefore provided relatively few services and relied on families and traditional gender roles for its functioning: the epitome of a strong male-breadwinner model welfare state (Ostner, 2010). Until the mid-1980s, this model was reflected in family policies which encouraged women to leave the labour market at childbirth (Ostner, 1991) In 1986 the introduction of parental leave ushered in a new ‘sequential’ model of female labour market engagement: withdrawal from the labour market at childbirth and subsequent return to part-time employment once the child was school-age (Blome, 2016)1. Despite a right to a part-time kindergarten place for children aged three and over being enacted in 1996, Germany lagged behind other European countries in its provision of ECEC, which compounded the effect of encouraging mothers to leave the labour market for a significant period (Bleses and Seeleib-Kaiser, 2004). The Red-Green government, elected in 1998, initially only modified this situation with a reform to parental leave in 20002. However, after its re-election in 2002, the SPD family minister Renate Schmidt sought to initiate change.

The new approach specified a broad policy problem: that families were struggling to reconcile work and family responsibilities. While this had previously been acknowledged as a problem for individuals and families, Schmidt recast the problem as a long-term threat to Germany’s prosperity:

Living and working conditions of working parents need to improve. Otherwise, there is a danger that more and more young women and men will not fulfil their wishes for children, or that those who start a family will not be able to develop their professional skills. Both would be difficult to cope with in the future. (SPD, 2001, p 305)

This dual problem of difficult work-family reconciliation – that Germany was missing out on both women’s skills in the labour market and on babies – was backed up by ‘hard’ economic evidence (Leitner et al, 2008). From 2003 the Family Ministry commissioned a series of reports and economic analyses on the fiscal benefits of improving the maternal employment rate (for example Spieß et al, 2003). Rürup and Gruescu (2003) argued that a shrinking population would harm economic growth, and that investment in ‘Sustainable Family Policy’ would lead to long-term benefits through an increase in children’s learning and subsequent skill development and a reduction in poverty. Schmidt made the claim about demographics explicit in November 2003: ‘Germany needs more children if we want to maintain our prosperity’ (Schmidt, 2003), breaking a taboo for German politicians, particularly from the SPD (Seeleib-Kaiser and Toivonen, 2011). By presenting demographics as key to prosperity, Schmidt was able to link her agenda to an ongoing high-profile media discussion over demographic ageing and the sustainability of the German social insurance model. Further, by emphasising that improving work-family balance was an investment in future prosperity, the Ministry tied the agenda into a growing debate over Germany’s educational performance, triggered by the so-called ‘PISA shock’ of the early 2000s (Frindte and Mierendorff, 2017).

Thus alleviating families’ struggles with work and family balance were linked to Germany’s future prosperity in a range of areas. The solutions proposed by the Ministry emphasised this breadth of goals and were not solely aimed at easing mothers’ access to the labour market, but also improving quality of life for parents, so that more families would choose to fulfil their *Kinderwunsch* – their desire to have children – as well as to have careers (Bertram et al, 2005; BMFSFJ, 2005; Ristau, 2005). This idea was broad enough for the Chancellor Gerhard Schröder to emphasise that the new approach contained no normative prescription, and thus did not threaten traditional notions of subsidiarity and the family: ‘Mothers and fathers who decide against gainful employment and for child-raising and family work deserve all our respect and support. But when people are forced, without wanting to, to choose family or work, I think something is wrong in our society.’ (Bundestag Plenarprotokoll, 2002).

The 2004 Tagesbetreuungsausbaugesetz (TAG) law undertook an increase of 230,000 childcare places for under-threes by 2010. Due to the electoral defeat of the Red-Green coalition in 2005, this was the only major reform undertaken by Schmidt’s ministry. Yet the new CDU-led Grand Coalition continued the expansive direction of family policy. If anything, the pace of expansion increased under CDU family minister Ursula von der Leyen. In 2006 parental leave was reformed, replacing the two year flat-rate benefit with a 12 month earnings-related benefit, with an extra two ‘partner months’ available on a use-it-or-lose-it basis. The 2008 Kinderförderungsgesetz (KiföG) built on and extended the TAG, aiming to increase national provision to 33 per cent of all children under-three by 2013, which would require the creation of a further of 750,000 new places, and instituted a universal legal right to a childcare place for all children from their first birthday, which would come into force in 2013 (Blome, 2016).

Thus the redefinition of work-family balance from a narrow idea about individual well-being to a broad idea centred on national prosperity was followed by a period of dramatic reform between 2004 and 2008, spanning two different governments. While the phrase ‘social investment’ was rarely used, the themes of a social investment approach were clearly central to the discourse (Seeleib-Kaiser, 2017). Central to this process was the successful building of a broad coalition of support for reform. Politicians were able to take elements from the overarching idea to make arguments tailored towards key potential opponents and win broad support from across society. Schmidt and Schröder persuaded business leaders that German competitiveness depended on making better use of women’s skills, especially given that by the early 2000s women were achieving higher levels of educational attainment than men, a point made by Schröder in his memoirs: ‘never before has there been a generation of so highly qualified women…For companies, which will have difficulties in finding qualified personnel within a few years, these women are also the qualified workforce of the future’ (2006, pp 439–40). This argument proved effective with the major unions and employers’ associations who became active promoters of reform and whose leaders made numerous public appearances alongside Schmidt and von der Leyen (DIHK, 2003; Schmidt and Mohn, 2004; BDA, 2006; Mohn and von der Leyen, 2007). Elsewhere Schmidt won support within a sceptical SPD for the potentially controversial parental leave reforms3 through the invocation of gender equality and the example of Sweden (see Persson, 2005). Von der Leyen continued Schmidt’s approach, stating her aim of making ‘family-friendliness a trademark of the Germany economy’ (Mohn and von der Leyen, 2007, p 15). Furthermore, she also supported the partner months, linking them to the demographic issue: ‘More men than women exclude a child in their life planning. Something has to change here’ (von der Leyen quoted in Vowinkel and Rübel, 2005). The combination of linking work-family balance to Germany’s economic and demographic future was crucial in persuading more conservative elements of the CSU4 of the need for reform (personal interview with former CSU politician, 2018).

Overall, while the phrase ‘social investment’ was rarely mentioned during the reform of German family policy, both the public discourse, and the shape of the reforms themselves, bear the hallmarks of the social investment perspective. First Schmidt and then von der Leyen were able to create a broad discourse around the notion of ‘Sustainable Family Policy’, recasting a relatively narrow issue – work-family balance – into a broadly defined problem for the future prosperity of Germany, which permitted a flexible interpretation of potential solutions. For the SPD, this could include concerns about gender equality, both in the labour market and in the household, and poverty and inequality; for modernisers in the CDU it could incorporate the demands of business for skilled labour, the demands of women voters and concerns about the financial sustainability of status-preserving social insurance systems; for the more traditional wing of the CDU it could help solve a national ‘crisis’ over the low birth rate; while across the political spectrum it could address other concerns about Germany’s place in the modern world in terms of its educational and economic performance. This polysemic version of social investment helped build a broad alliance in favour of the reforms, which eventually incorporated all major political parties, employer associations, unions and even some religious organisations. The continued high profile of family policy on the political agenda in recent years is evidence of this.

## England

Traditionally, English family policy was extremely meagre, limited to paying residual benefits and providing some ‘welfare’ daycare services for those ‘in need’ (Lewis, 2009). In line with the liberal welfare regime’s principle of a limited state and reliance on markets, ECEC was considered a private responsibility outside the remit of the government, best delivered by the market, while leave was seen as best arranged between individuals and employers. England was therefore, like Germany, a ‘strong male breadwinner model welfare state’, although this was more a result of a lack of government involvement rather than through explicit promotion (Hantrais, 2004). In this policy vacuum, a market of ECEC provision had developed, but was expensive and varied greatly in quality and availability (Randall, 2000). Some tentative steps towards reform had been taken in the 1990s, but the Conservative government had shown little appetite for major change, and work-family balance was seen as a private matter, in which the state should not be involved (Randall, 1995).

Labour won the 1997 election and came into government with an approach to work-family policies that was split between two different goals. On the one hand there was a discourse highlighting the long-term benefits of investment in young children: ‘children are 20 percent of the population but they are 100 percent of the future’ was a frequently used refrain by Labour leaders (Blair, 1999; Brown, 2001; 2002). Labour had promised to ‘make education our number one priority’, describing it as ‘not just good for the individual. It is an economic necessity for the nation’ (Labour Party, 1997). Investment in children’s education was an investment in the country: ‘By investing in [children], we are investing in our future’ said the Chancellor, Gordon Brown in 1999 (1999, p 8). The potential benefits of this investment were savings in the costs of long-term social problems: ‘for every pound that we invest in a child's early years we shall save many pounds later on everything from support for a child with special educational needs to the payment of income support.’ (Hansard, 1999).

The second policy goal was to increase the proportion of mothers, particularly lone parents, in employment, in order to combat child poverty and increase the labour supply. Brown’s ‘endogenous growth theory’ argued that employment was key to increasing the productive capacity of the economy through mobilising unused skills (Crafts, 1996). Labour had positioned its approach to social policy as ‘a modern form of welfare that believes in empowerment not dependency’ (DSS, 1998, p 19), and it placed ‘activation’ of those not working at its centre. Lone parents were a particular focus, due to the links between lone parent families and child poverty, which Labour aimed to eradicate by 2020 (Blair, 1999). As such, a lack of available and affordable childcare was identified as a barrier to employment, for lone parents in particular, and as an area in which spending could lead to both productivity gains and poverty reduction (see Harman, 2017). Childcare was therefore discussed in economic terms: ‘care should be regarded as part of the national economic infrastructure and as important to women as the roads and railways on which they travel to work’ (Hansard, 1997). Leave policies were similar, with the government stressing the benefits to the economy of expanded provision: ‘Competitiveness depends on the UK making the best use of the talents of as many people as possible. The larger the number of people – particularly skilled people – to which business can look, the better.’ (DTI, 1998, para 5.1).

With its large parliamentary majority, Labour did not need Conservative support for reform. Nevertheless, the party was keen not to alienate organised business, stressing the ‘business case’ of policies which encouraged mothers to stay in the labour market (DTI, 2000). Furthermore, policymakers were sensitive to accusations of government overreach and stressed the importance of a childcare market of diverse providers in which parental choice was vital. By adapting such an approach, Labour was able to win the grudging acceptance of leave regulation from organised business and counter any claim from political opponents that these policies represented the ‘nanny state’.

Thus Labour’s rhetoric about work-family policy reform was split between a rationale for investment in early education based on the benefits for children in the future, and a goal of increasing maternal employment, especially among lone parents, which prioritised increasing the availability of childcare and improving leave provision. This fragmentation perpetuated a long-standing divide between education and care (Lewis, 2013), and was the result of differing processes by which they became Labour policy. The development of early education was a bottom-up process led by child development experts who were linked to Labour through Margaret Hodge, a former local government leader who had pioneered integrated ECEC centres. On the other hand, the employment agenda was more closely linked to Brown’s Treasury and to Harriet Harman, a high-profile feminist MP, who had been Brown’s deputy in the early 1990s and who helped incorporate feminist campaigners’ arguments for childcare provision into Labour’s economic programme. This separation of the policies was maintained after 1997 through administrative fragmentation (Eisenstadt, 2011), and was evident in policy design: early education was a universal offer to parents of three- and four-year-olds of 12.5 hours per week free provision for 33 weeks per year, which had to be taken as 2.5 hours daily, conditions which made it difficult to combine with employment.5 The National Childcare Strategy (DfEE and DSS, 1998), on the other hand, was targeted: while some government funding was available to help launch childcare provision in low income areas, the main strategy was to support low-income *working* parents with the costs of childcare provision through means-tested in-work benefits. Leave policies, with their focus on the ‘business case’, were developed through a process of consultation with employers and parents, which led to a series of incremental reforms which extended maternity leave and increased maternity leave benefit, while doing little to challenge the ‘maternalist’ focus of leave policies (Daly and Scheiwe, 2010).

After 2002 there were attempts to broaden the policy goals in each of the three areas. Labour’s rhetoric on ECEC became more focused on evidence that it could help narrow attainment gaps between children from different social backgrounds (Sylva et al, 2004). Child development now became a key focus of the whole of ECEC and this served to bring the two sides of ECEC policy together. Nevertheless, while this involved significantly more spending, the overall approach of universal, part-time, early education for three- and four-year-olds, supplemented by means-tested financial support for working parents with the costs of market provision remained Labour’s model (HMT et al, 2004; Moss, 2014). There was also a shift in rhetoric around leave when the relevant minister, Patricia Hewitt, attempted to broaden the approach, arguing that families required ‘real choice’ in how to balance work and family life, which would involve more gender neutral leave (HMT and DTI, 2003). However, she was unable to win the support of employers, who had only begrudgingly supported previous extensions to maternity leave (Hewitt, 2014). Labour had built support for leave policy expansion on the back of a ‘business case’, such a case could not be so easily made for fathers and it proved difficult to make any other case given opposition both from the Conservatives and business that the government was promoting a ‘nanny state’ (for example Daily Mail, 2004).

Overall the initial expansion of work-family policies in the UK that took place under the Labour governments of 1997-2010 had a social investment focus, but it was split into separate parts: a promotion of education for young children and a promotion of employment for mothers. As such, a broad and polysemic discourse for a package of policy reforms did not emerge and early education, childcare and leave policies were all developed by separate government departments with separate aims. While each area saw significant reform, and the introduction of free universal early education was new, there were also strong policy continuities with the pre-1997 status quo: targeted support for childcare costs and expansion of maternity leave. Thus leave policies permitted mothers to take time out of the labour market at childbirth but did little to shift incentives within households about care roles. Further, childcare policy was designed as economic infrastructure and thus focused on the low-income families that the government wanted to move into the labour market. The fragmented nature of the overall discourse meant that while within each policy area opponents were convinced to at least acquiesce to changes (for example businesses were persuaded to accept increased maternity leave in exchange for administrative simplification), this change was necessarily incremental and opposition became difficult to overcome when attempts were made to broaden the overall idea.

## South Korea

South Korea belongs to a group of welfare states in East Asia which share the common cultural heritage of Confucianism, a religion that emphasises the role of the family and hard work (Jones, 1993; Goodman and Peng, 1996; Sung, 2003; Walker and Wong, 2005). Confucian principles involve an unconditional obligation for women to take on the roles of housewives and/or caregivers in the family rather than to become active in the labour market (Peng, 2004). However, Confucian philosophy has been challenged by demographic and socioeconomic changes, especially those occurring since the 1990s, such as a rise in the age of first marriage and a concomitant fall in the fertility rate which has remained persistently low, recorded as being the lowest among OECD countries at 1.08 in 2003 (called ‘the 1.08 shock’). This rapid decline in the fertility rate was seen as a serious socioeconomic threat to the future workforce as it has been matched with an increasingly ageing population: the percentage of the population aged over 65 was projected to be 14.5% by 2020 (KNSO, 2003, cited in Peng, 2004). Another significant social change has been the dramatic increase between 1960 and 2000 in the number of working women, particularly married women, while the proportion of women working shorter hours and holding temporary jobs has increased (Peng, 2004). Further, there have been increases in the number of single mother families and the child poverty rate, both of which have become policy issues in South Korea. Even though there remains a strong cultural identity based in Confucianism, such demographic and socioeconomic changes have brought to the fore new policy concerns, including debates over the lack of childcare provision and working families’ need for support. Strong commitment to ensuring greater childcare support especially for working families was revealed in the statement made by President Roh Moo-hyun (2003-2007) during his address during ‘Women’s Week’ celebrations on 4 July 2003: ‘Once you give birth, the government will look after your children’.

This policy recognition of childcare had already begun during the presidency of Kim Dae-jung (1998-2002), which has been identified as the period in which the state began actively intervening in childcare (Byun, 2000; Baek and Seo, 2004; Kim, 2007, 2010; Peng, 2011a, 2011b; An, 2013; Fleckenstein and Lee, 2014; Lee, 2016). The Kim government pursued the ideology of ‘productivism’ in which ‘social policy is strictly subordinate to the overriding policy objective of economic growth’ (Holliday, 2000, p 708; see also Chan, 2002; Peng and Wong, 2008). The Roh government further developed specific coordinated policies to address the linked issues of childcare and work-family balance and adopted a rhetoric of social investment: the policy goal of ‘investing in children’s development and work-family reconciliation’ was associated with a proliferation of social policies and programmes targeting early childhood education and care (ECEC) (Kim et al, 2007). In pursuit of this goal, support for families with children was demonstrated through extended maternity legal protection, maternity and parental leave. The investment in extending childcare and leave policies were taken up as primary policy goals for resolving the low birth rate and promoting women’s working participation in the labour market. In fact, the ‘Presidential Committee on Ageing and Future Society’, established during the Roh government, announced four policy goals: to ‘boost fertility rate and fostering superb children’, to ‘alleviate the cost of childcare for parents’, to ‘increase women’s working participation’ and to ‘create new job sectors’ (The Presidential Committee on Ageing and Future Society, 2004). Subsequently, these policy goals were highlighted in a governmental report issued during the Roh presidency, entitled: ‘The Safe Infrastructure for Supporting Childcare: policy effort to reinforce the socialisation of childcare’, which stated that childcare policy was based on the recognition of child well-being as a form of long-term investment in children and women (The Presidential Counsel of Policy Planning Committee, 2007, pp 5–8).

These policy goals couched in the language of social investment can therefore be considered as triggering the state’s concern regarding ‘investing in children’s development’, which subsequently raised the political profile of extending socialised childcare services. Similarly, the policy goal of ‘work-family reconciliation’ for carers and the provision of suitable childcare services came to feature as areas that politicians were conscious of and, more importantly, acknowledged as requiring attention. These policy goals can be identified as bringing forward a paradigm shift: a new acceptance that welfare expansion could be viewed as a form of investment, targeting not only children’s development, but also reconciling work-life balance tensions in order to foster female employment.

The polysemic concept of social investment was driven forward within a gender-friendly political environment during the two aforementioned governments. It appears that the two presidents were eager to institutionalise ‘femocrats’ (that is, female bureaucrats) to push for women’s interests in public policies. For example, the Kim government founded the Ministry of Gender Equality in 2001 and later in 2003 during the Roh government, ministerial responsibility for childcare was transferred from the Ministry of Health and Welfare to the Ministry of Gender Equality in order to consolidate issues of childcare with gender perspectives (Lee, 2013, 2017). This transfer underlined that the approach to the issue of childcare was taken from a gender aware perspective, although there were criticisms that in reality the transfer could not change the gender stereotype of women’s role as carer. Despite some controversy over the transfer, most women’s associations, such as the Korean National Council of Women (KNCW) and the Korean Women’s Association United (KWAU), were in favour of the shift. The rationale for their stance was perhaps their eagerness to have leverage, as up until then, they had enjoyed little political representation. Through such an approach, the broad concept of social investment was able to absorb elements of the gender-friendly political environment at that time, and this helped construct a broader political coalition of women’s groups.

Social investment rationales were acceptable even to conservative parties and the business sector, which tended to be against the expansion of welfare expenditure. This was because they promised economic growth through investing in human resources as well as utilising the female labour force. By linking economic growth to the crisis of inadequate childcare provision, the expense of welfare expansion was justified as addressing the various risks brought about since the 1990s. Therefore, through using social investment discourse, agreement to raising social expenditure was obtained from the most conservative camps in government. Social investment, conceived of and shaped in this fashion, permitted the construction of a broad coalition between the advocates of conservative national ideology and those who supported the Korean welfare regime of productivism.

Overall, the idea of social investment was embedded as a political consensus in the Korean political landscape. It allowed for a coherent and sustained approach to fostering children’s development as well as encouraging women’s participation in paid work. With concerns being voiced regarding securing a future national workforce, the matters of supporting childcare and encouraging women to enter the labour market were taken seriously during the Roh administration. This priority has continued to the present day and free childcare for children aged up to five was expanded following the presidential election held in 2012. Free childcare for children aged up to five was further extended in 2018 by providing six hours of free childcare for stay-at-home mothers and 12 hours for those seeking employment or requiring long term childcare, due to their participation in the labour market. Moreover, maternity and parental leave have been increased, currently providing mothers with 90 days paid leave as well the entitlement for both parents to take one year of childcare leave. Men’s childcare leave take-up rate has increased almost fifty times over last ten years, recorded at 18% in 2018 (Ministry of Health and Welfare 2019). Thus, the social investment strategy has contributed towards bringing about a shift in perception in Korean politics that social welfare expenditure can be interpreted as investment for the future.

## Japan

Traditional welfare provision in Japan has been generally regarded as distinct, taking a ‘residual’ form (Tabata, 1990, p 2) known as ‘Japanese-type welfare society’, which emphasises the role of informal self-help, mutual aid and market as well as enterprise-based provision (Hill, 1995; Esping-Andersen, 1996; Goodman and Peng, 1996; Kono, 2005). Following the global oil shock in the 1970s, the Japanese government suppressed any increase in the state’s involvement in welfare by enhancing the role played by other sectors, specifically the family and corporate enterprises. This residual approach to welfare remains in place and has been evaluated as a ‘familialist welfare approach’ (Ochiai, 2009; Song, 2014). In the face of ongoing modernisation, Japanese cultural heritage became a hindrance and was considered to be standing in the way of the rapid development of a progressive capitalist economy. As a consequence, many traditions including Confucianism have been watered down. However, some aspects of Confucian culture such as its hierarchical rules and traditional social norms including stereotyped gender roles within the family remain strong. In particular, with respect to childcare for infants, there is a persisting cultural view on good mothering which maintains that infants under three years old should be looked after by his/her mother to ensure their proper development (Boling, 2015).

Similar to the situation in Korea, this traditional belief in the woman’s role as carer has been challenged by Japan’s demographic transition towards an aged society. Concerns regarding the declining birth rate, which occurred some years earlier than in Korea (the ‘1.57 shock’ happened in 1989), feature particularly strongly. The low fertility rate was seen as a threat to Japan’s prolonged economic growth due to its impact on the labour force of the future (Cabinet Office, 2011; JILPT, 2013). At the same time, the proportion of older people in the population was dramatically rising, along with demand among for social services. This demographic crisis alarmed the central government and an inter-ministry meeting was launched in 1990 to devise policy measures to address the problem (Suzuki, 2006; Peng, 2011a). This initiative was followed by the formulation of a ‘Basic Direction for Future Child Rearing Support Measures’ in December 1994, known as the ‘Angel Plan’. Following this, in December 1999 the government issued the ‘New Angel Plan’ for the period between 1999 and 2004, asserting the need to improve gender equity and working conditions. The Junichiro Koizumi government of the conservative, Liberal Demographic Party (2001-2006) was strongly committed to increasing the fertility rate. For example, during this government, the Ministry of Health, Labour and Welfare announced the ‘Measures for Decreasing Children Plus One’ encouraging local governments as well as companies to support child-rearing. Moreover, the Koizumi government declared the ‘New-New Angel Plan’, emphasising the role of local government and companies in providing childcare support and improving gender equity (Suzuki, 2006).

Subsequent administrations, those of the Democratic Party of Japan governments (2009-2012) also attempted to address the issue of the low birth rate as well as the long waiting lists for childcare centres by setting up a ‘Zero Waiting List Team’ (originally initiated in 2002). Indeed, the problem of long waiting lists for childcare centres became a major political issue and remains one of the many unresolved childcare issues, especially in the major cities of Japan. This is attributed to the lack of government support for working families as well as their lack of funding for licensed childcare centres. Nevertheless, the political commitment during the Koizumi government could be seen as a progressive step as it developed an emphasis on the role of corporate enterprises that challenged conventional beliefs regarding good mothering. Although the policy goals were not particularly elaborated through a social investment discourse, they still demonstrate the Koizumi government’s commitment to supporting families’ needs for childcare with some degree of awareness of gender equality issues at work, although primarily due to pressing demands to increasing the birth rate. However, the political commitment to improve childcare provision and gender equality was not as strong under the next and current conservative government, that of Shinzo Abe, who was returned to power in 2012. Even though he pledged to provide childcare for all children, his main concerns were stimulating economic growth, increasing the work force available to the labour market, which were seen as ways of addressing the crisis of ‘too few children’. In 2015, the cabinet called for intensive efforts to overcome this ‘critical situation’ whereby the number of children was dwindling to such an extent that it would shake Japan’s societal and economic foundations (The Japan Times, 2015). The over-riding concern, that of the long terms economic recession due to the low birth rate, was fully revealed in Abe’s address during the meeting for ‘Overcoming Population Decline and Vitalising the Local Economy’ held in September 2014, at which he stated: ‘Creating local communities, in which young people can work with peace of mind, where it is possible to raise children and hold dreams and hopes for the future, is the path to overcoming Japan’s population decline’. Thus economic recovery has been prioritised over further work-family policy reforms as a remedy to the birth rate

With regards to statutory leave policies, the conservative government passed the ‘Child Care Leave Act’ in 1991, which was extended to become the ‘Child Care and Family Care Leave Act’ in 1995. However, under this, the income replacement benefit entitlement was only 30% of pre-leave earnings and lasted for up to a year. Men could only take leave for the first eight weeks if their partner was not working. The level of the benefit payment was increased to 50% income replacement with effect from 2007. This revision also extended the Act to help part-time workers who had had no coverage up until that time (Rebick, 2011). However during the Abe administration, the introduction of leave lasting up to three years, meant that many mothers could stay at home to look after their children themselves (Estévez-Abe and Kim, 2014; An and Peng, 2016). From one point of view this could be interpreted as a pragmatic solution to the politically salient issue of long waiting lists for childcare places, as it served to manage demand from parents of very young infants. Alternatively, this somewhat contradictory step could be taken as simply reflecting conventional beliefs regarding the obligations of mothers to remain at home as carers. Further, men’s childcare leave take-up rate is still very low at 6.2%, compared to the women’s one at 82.2% (Ministry of Health, Labour and Welfare, 2019, cited in JILPT 2019).

Compared to Korea, there were similar or perhaps even more challenging demographic changes in Japan, but the idea of social investment does not seem to have been brought forward as a mainstreaming policy discourse. We argue that this is a result of the specific ways of engaging with the policy discourse. While concerns were voiced regarding the low fertility rate, the prolonged economic recession and labour force supply, the idea of social investment discourse was hardly engaged with in the policy goals. It is hard to judge whether the lack of engagement with social investment discourse has led to unsuccessful policy reforms in the long run, but it has led to contradictory policies, such as in the extension of leave provision. However, it is clear that the Japanese government has not succeeded in preventing fertility decline, as, for instance, the fertility rate dropped further to 1.26 in 2006, becoming the ‘lowest-low’ rate in the country’s history (OECD, 2018).

No single factor explains all policy outcomes, but we argue that the Japanese government’s efforts to take actions on declining fertility steered away from fully developing the idea of social investment, and was not sufficiently developed to enable a political coalition for work-family policy reform to coalesce around it. For example, gender issues related to childcare were neglected during the policy decision-making processes in Japan (Boling, 2008; Imai and Sato, 2011). The role of coalition members such as women’s groups in the case of Korea, or conservative parties in Germany are clear from previous sections. Yet it is difficult to find any evidence showing political coalitions formed with civil organisations in the case of Japan which points to the conclusion that work-family issues were scarcely touched upon from a broader perspective than just a focus on the birth rate (Peng, 2002; Gelb, 2003). Rather, the steps that were taken could be viewed as supporting elements of a primarily pro-natalist agenda.

Further, the long-standing policy problem of childcare waiting lists has remained unresolved and the on-going debate about integrating services for pre-schoolers (3 to 5 year-old children) and day care centres (for those aged 0 to 5) raises doubts regarding whether this offers any real solution to the problem. This is because the debate has remained one-dimensional and fails to address issues relating to unsatisfactory service quality in non-licensed childcare centres and the increasingly inadequate wages for the staff employed in them. Despite the amount of social expenditure increasing, the budget allocation for expenditure targeted at families with children is extremely compared to other developed countries (National Institute of Population and Social Security Research, 2004; Irigoyen, 2016). According to OECD data on social welfare expenditure in 2015, in Japan 43% was spent on programmes for the elderly, such as pensions, while only 6% was spent on child benefits and childcare services. This is in contrast to South Korea where only 28% of social expenditure was allocated for older people while families with children were allocated double that spent in Japan, receiving 12%.

Overall, work-family policy in Japan was comparatively narrowly and superficially approached. The shortage of available childcare facilities presented private sector providers with an easy opportunity to become more involved in provision, which they readily took up in the context of a lack of government action. The reasons for this governmental failure might be related to the institutional legacy of the Japanese-type welfare society which emphasises the role of the family and corporate enterprises in providing welfare. However, two additional reasons may shed light on the situation. First, the issue of childcare was rarely approached from the context of gender relations, which could possibly be the fundamental reason behind the continuing low birth rate. Second, the locally developed version of the idea of social investment in Japan did not go beyond the primary issue of the birth rate and could therefore neither bring about an effective political coalition for reform, nor evolve to be polysemic in nature.

## Conclusion

As the detailed investigation of work-family policies has demonstrated, policies such as ECEC services and parental leave have been expanded to a differing extent in each of the four countries. Arguably, the reforms have been more consistent and sustained in Germany and Korea than in England or Japan. In the former countries both leave policies and ECEC services have been overhauled, with a sequence of reforms maintaining work-family policies high on policymakers’ agendas, with Korea even going as far as to introduce universal free childcare. In England there has been reform of ECEC policies, but since 2010 it has only sporadically been on the government’s agenda, and provision remains expensive and of varying quality, while leave policies retain their ‘maternalist’ approach. In Japan, while childcare expansion has occurred, reforms have been piecemeal and momentum has been halting, with periods of political interest followed by relatively little attention from policymakers.

This chapter has argued that the extent and logic of reform can be linked to the idea of social investment. Following Jenson (2010), it was argued above that social investment is a polysemic international idea, which would be translated into different national contexts in different forms. Indeed, the four cases demonstrate that this is the case. The arguments in each of the countries stressed social investment justifications for a greater state role in easing work-family balance conflicts, but various aims were emphasised. These included reversing low birth rates and the sustainability of public services by improving the ability of women to have both careers and families, improving human capital formation through a focus on child development, increasing economic productivity through increasing maternal employment and combating child poverty and inequality through improving family incomes and education. Further, it was argued that not only would different elements of social investment be emphasised in different national contexts, but that some countries would see a more polysemic local version of social investment, while others would host a more narrowly defined social investment idea. The empirical investigation of the four cases backs up this prediction. In Germany, the arguments for intervention focused on the problem of families choosing not to fulfil their ‘desire for children’ which led to social and economic costs for Germany as a whole. Thus the social investment rhetoric was focused on employment and education but also on work-family balance as a social issue. In Korea, like in Germany, the social investment arguments related both to economic and demographic concerns, and were linked to a legacy of productivist welfare. ECEC in particular was seen as an investment that would lead to multiple benefits, particularly in terms of child development and maternal employment. In England, instead of a broad social investment discourse, leave, childcare and early education policy each had their own rationales, which were rarely combined into a coherent overall strategy. Thus England presents a case in which a series of different ideas did not come together to form an overarching polysemic idea. As such, it lacked a case for the state to intervene within the family, for example to attempt to encourage more fathers to take on care responsibilities, something that Germany was able to do. The focus of reforms in Japan was overwhelmingly on the low birth rate, with comparatively less attention on social investment concepts such as maternal employment and/or gender equality in the workplace or child development. This meant that ECEC was merely one tool of many that governments could use to combat the national crisis of the low birth rate, and, unlike in the other three countries, work-family reconciliation policies remained something of a partisan issue. This can be seen in the lack of enthusiasm among conservative governments for continued childcare expansion and the introduction of longer leave policies.

Finally, the chapter posited a relationship between polysemy of ideas and the ability of that idea to act as a ‘coalition magnet’ (Béland and Cox, 2016). Without being able to specify the causal direction, it is notable that both Korea and Germany have seen broad and sustained coalitions for work-family policy reform supported by parties across the political spectrum and also by employers, unions and women’s groups.; England has seen both political parties commit to reform, but with less progress since Labour left power in 2010 and notable opposition from employers to any further reform of leave policies; in Japan it is notable that coalitions hardly coalesced around work-family reconciliation policies at all.

By drawing on the details of these four cases, this chapter has made a case for considering the impact of social investment as an *ideational* force in politics. It has argued that ideas can have particular political power when they are imbued with an ambiguity which can appeal to a range of political actors. Such polysemic ideas can act as ‘coalition magnets’ and attract a broad coalition of support for policies which may seem surprising in some cases, for example in the case of the German CSU acquiescing to the ‘partner months’ encouraging fathers’ participation in childcare. On the other hand, a more narrowly defined social investment idea can constrain political reform, as Patricia Hewitt discovered when she was unable to make the case for more gender-neutral parental leave in England. However, this is not to claim, of course, that other factors are unimportant: we have seen in the examples that institutional legacies, such as the English reliance on market provision, or Japanese familialism, play powerful constraining roles on the potential for significant reform. Further, a polysemic idea does not imply a completely coherent agenda. German policymakers have been accused of taking ‘two steps forward, one step backwards’ in terms of their failure to enact reform of tax splitting, which provide incentives in the opposite direction to those outlined here. Korean reforms have been criticised for their lack of attention to the significant discrimination women face in the labour market or the lack of enforcement in the new parental leave policies.

Nevertheless, the findings in this chapter suggest some lessons on effective policymaking. In particular, policymakers looking to undertake significant reforms would do well to define their goals as broadly as possible, which allows flexibility in how the discourse is interpreted by different groups and also allows coalition partners to add elements to it. Evidence from Germany and Korea suggests that government control of the agenda is useful in setting out a polysemic idea; that a top-down approach to agenda setting has the best chance of creating a powerful coalition magnet. The story of reform in England on the other hand suggests that bottom-up agenda setting can be effective in achieving immediate policy goals but is less effective in building a longer lasting coalition for change. Furthermore, this top-down approach does not imply a rigid grip on the agenda; in both Germany and Korea the government actively sought to win support from key groups through incorporating elements that were important to key stakeholders in their discourse; in Germany this was particularly the case with employers while in Korea it can be seen in the reaching out to women’s groups. Both examples demonstrate that coalition-building may involve significant compromise with potential opponents.

Overall, this chapter has demonstrated one way in which ideas can matter in politics. Through acting as coalition magnets, ideas can appeal to broad coalitions that can allow particular agendas to withstand partisan changes in governments, win support from unlikely sources and enjoy long periods of sustained political attention.

## Notes

This reform facilitated greater flexibility through providing a right to part-time work and offering a ‘budget option’ of a higher benefit for a shorter period of time.

2 There was concern within the SPD leadership that the reforms were regressive in that they resulted in higher income families gaining more from the new earnings-replacement benefit, while low income families received a net cut in the overall benefit (Henninger et al, 2008)

3 The CSU is the more socially conservative, Bavarian ‘sister party’ of the CDU.

4 Every four-year-old was given a place by 1999 and the roll-out of provision for three-year-olds was completed by 2003. The amount of free early education was increased in 2004 to 15 hours per week for 39 weeks and was made more flexible. It was further extended to twenty percent of the most disadvantaged two-year-olds by 2010.

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