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‘Bigger Societies – Smaller Governments?’

The Production of Inequality

The Distribution and Conversion of Resources in the Welfare State

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Introduction / Abstract

When analysing the operation of welfare states, inequality and poverty are usually measured with either fiscal concepts using money as an input indicator, or standard-of-living approaches, gauging the output of the utilisation of resources. This paper proposes another approach: With reference to the ideas of Amartya Sen, the focus is put on the conversion/transformation of resources (section 1). In addition to *income* Sen considers two further resources as important: *education* and *health*. Social-epidemiological research shows that all these resources are closely connected because individuals are continuously using and transforming these resources (ibid.). Understanding the conversion of resources into other resources can help to explain how people act and how they are supported or hampered by different welfare states regimes.

In section 2 the definition of "resources" is broadened referring to Bourdieu's theory of capital. Apart from income and education ("cultural capital") he assigns considerable importance to social capital. Additionally, psychological categories like self-consciousness and motivation are used to expand the concept in order to map a full range of resources needed by individuals for handling their situations. The resource-based view can be utilized for several purposes: It can be used to depict the capabilities of a person (after Sen) as well as for a multidimensional description of deprivation and social inequality.

The resource-based view also permits a new perspective regarding the function of the welfare state: As relevant research shows, the productivity of a welfare state can be analysed by how a country "distributes" resources like monetary transfers, education, health, etc. to its population. With this mechanism a country determines the inequality of the provision of these resources and eventually its inequality structure. Within this theoretical framework welfare states can be differentiated by the resources they consider important: Some countries (like Germany) put emphasis on monetary transfers, others (like Sweden) highlight the meaning of (and equal distribution of) education or health.

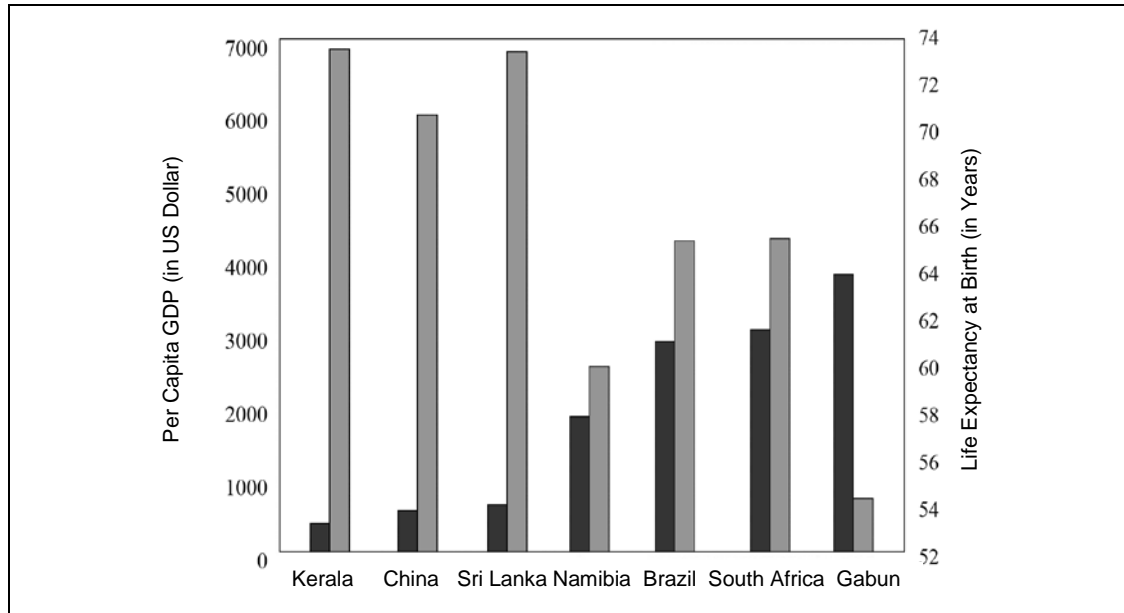
1. Resources, Functionings, and Capabilities according to Amartya Sen

When Sen began researching welfare metrics like GDP and life expectancy in the 80s (see figure 1), he explained the huge discrepancies on two levels. On one hand he postulated the meaning of "freedoms", which refer to the political constitution of the community life: political freedoms like freedom of expression and economical freedoms like the free access to markets can expand the capabilities of people in the same way as free access to education, health and basic social security. All these factors have positive effects on life expectancy (Sen 2000: 52f.). On the other hand he described the capabilities of individuals with the existent resources and the possibility to use these resources for the pursuit of individual goals.

He refers to this capacity to use resources as *functioning*. And he places emphasis on the fact that these resources enforce each other, or in other words, that they can be trans-

formed into each other. The *Capability* approach of Amartya Sen is an alternative concept to the application of the theory of marginal utility on human behaviour which can better depict limitations of freedom of action. However Sen uses the word "capability" for both levels: for the individual options which result from the capacity to use resources (on a micro level) and for the above mentioned "freedoms" on the macro level. He does not however explain the interrelation between these two levels (c. f. Leßmann 2007).

Figure 1: GDP and Life Expectancy at Birth



Source: Sen 1999: 47. The black bars represent the average per-capita income, grey bars the average life expectancy.

Even though the relationship between the freedom of action on the macro level and the micro level remain vague, the influence of the resources discussed by Sen (*income, health and education*) on individual life expectancy as well as the convertibility/transformability of resources into other resources can be proven by social-epidemiological research.¹

- *Income and Health:* Research has shown repeatedly that health status is dependent on disposable income.² This interrelation is known as the *shift effect* or as *selection* ("Poverty makes you sick."). The inverse interrelation, the decrease of income resulting from poor health (which often can be observed when people are chronically ill), is called *drift effect* or *causation* ("Sickness makes you poor."). These effects cumulate – even in developed industrial nations – to a life expectancy gap of six to ten years between rich and poor people (see e. g. Klein / Unger 2001, Held-Reil 2000).
- *Income and Education:* The significance of education for income realisation is not only shown by the Mincer function – which demonstrates the influence of the years

¹ For the epidemiological questions see e.g. Mielck 2000, Richter / Hurrelmann 2006

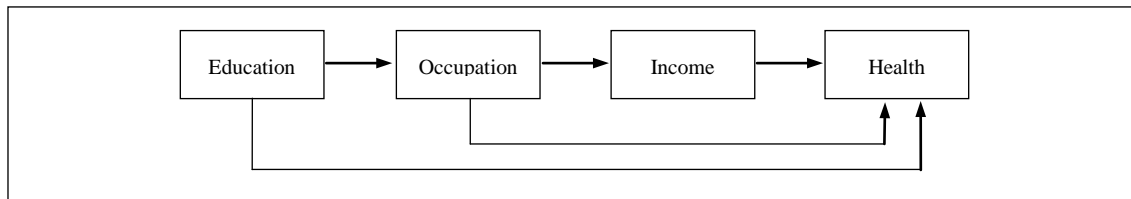
² E. g. Lampert / Ziese 2005, Unger 2003, Reil-Held 2000, Fuchs 1995, also see Lynch / Kaplan 1997

of education and of work experience on income (Mincer 1974) –, but also many other studies on *Return on Education* (z. B. OECD 2010). Again, an inverse relation exists. Income increases educational efforts: People with good jobs continue their training and improve their qualifications. And the higher income level of a household, the more successful the education of its children.

- *Education and Health*: Socio-epidemiological research shows a positive effect of education on health and life expectancy that is independent from the influence of income size.³

A Finish study shows vividly how complex these transformations are. Lahelma et al. (2004) scrutinised the interaction of education and income and their influence on health: Whereas the effects of education on health are mediated by occupation and income, education and occupation have direct effects on health (see figure 2). The study survey shows that men of the lowest income class had chronic illnesses 1.5 times more often than men of the highest income class. For women the factor was 2.5. More than 50% of the influence of education was mediated by the occupational level and income (331).

Figure 2: Pathways of Resource Transformation/Conversion



Source: Author, based on Lahelma et al. 2004: 327

The results of social-epidemiological research do not only confirm the general importance of the resources mentioned by Sen (*income, health, and education*) but it supports the thesis that these resources can be transformed into each other and can enhance each other. However, Sen's comprehensive and sophisticated approach contains several weak points: Firstly, there is a gap between his empirical surveys with highly aggregated data on the macro level and the theoretical argumentation which focuses on the individual and its ability to use and transform resources. Let's call this missing link the Micro/Macro gap. Secondly, Sen's approach can be criticised because he puts too much emphasis on the ability to use resources (which he calls *functioning*), but underestimates the importance of the actual resources. Thirdly, he neglects a thorough discussion of the power structures responsible for the unequal distributions of resources. His idea that more resources more or less automatically represent more capabilities (and more freedoms) is sociologically weak. More resources also mean more distributional fights and new ways of distinction. Fourthly, there are other more essential resources apart from income, health and education which broaden the capabilities of action and influence life expectancy.

³ See e.g. Mielck 2000, Unger 2003: 98, Lampert / Ziese 2005, Klein et al. 2001, Becker 1998, Mirowsky / Ross 1998, Davey Smith et al. 1998, Valkonen et al. 1997

In the following, I will first expand the spectrum of the considered resources (section 2). Then I will try to show how the Micro/Macro gap can be closed: A model will be developed, that shows the effects of social welfare institutions and interventions on the resource supply of individuals (Chapter 4). The model also allows the discussion of the mechanisms of inequality distribution.

2. Expanding the Resource Spectrum

Resource signifies something that helps a person to pursue one's individual goals and to secure one's survival. According to such a broad definition, there can be quite a variety of "resources". Which resources should be considered in special studies depends on theoretical or practical questions. Subsequently our consideration is expanded – founded on theoretic considerations – to social resources and psychical resources.

The first expansion results from a reference to Bourdieu's theory of capital (Bourdieu 1992). Three types of capital, the *economic*, the *cultural* and the *social capital*, are interpreted as resources.⁴ Putting it simply, Bourdieu's economic capital corresponds to Sen's income. Cultural capital corresponds to an expanded notion of education. Bourdieu subsumes under the term *social capital* "the whole of actual and potential resources, which are related to the possession of a long-lasting networks of more or less institutionalised relations of acquaintance or appreciation ..." (Bourdieu 1992: 190).

The capitals types resemble in their significance the resources as discussed here. Like Sen, Bourdieu puts emphasis on the transformability of the types of capitals into each other. The relevance of (the wider circle of) acquaintances for finding of a good and well paid job can serve as an example for the transformability of social resources into income.⁵ Furthermore social networks also have a positive effect on health⁶: Many empirical studies show a positive correlation between the number of friends and acquaintances and good health (z. B. Jungbauer-Gans 2002; Schwarzer / Taubert / Schulz 2002: 6f.). On one hand contact with and relations to other persons seem to have a protective impact (Siegrist 2000: 141), on the other hand some illnesses can be better treated and cured when the person is part of a favourable social network. The research of Uta Gerhardt for instance shows how social networks influence the quality, the processes and progresses of treatment in the areas of dialysis (Gerhardt 1986) and coronary bypass surgery (Gerhardt 1999).

Another expansion of the resource spectrum results from connections to the field of psychology.⁷ The term "psychical resources" here refers to such different concepts as *motivation, self-esteem, locus of control, self-efficacy, and sense of coherence, and iden-*

⁴ Resources can be seen as a type of capital when they can be accumulated / hoarded.

⁵ E.g. Granovetter 1995; Pischner et al. 2002; Kortmann / Sopp 2000, Freitag 2000

⁶ Kroll / Lampert 2007, Helmert / Voges 2005, Klein et al. 2002

⁷ Hobfall 1989, Hobfall / Jackson 1991, Foa et al. 1993 and Schubert 2004, 1994 deal with psychological resource theories.

tity-resources or inner resources respectively – notwithstanding the differences of these concepts.⁸ Psychological resources also interact with other resources.

Several studies show that children from poorer families and from families which are impacted by unemployment are less self-confident.⁹ Butterwegge et al. ascertain in a qualitative study that the impact of poverty on the self-esteem of children is weakened when compensated by other resources:

At the age of 10 or 11 children can understand that they have limited options to consume. This massively attacks their self-confidence. [...] If a family has plenty of cultural and social capital to compensate the shortcomings of consumption, the process of disintegration might be stemmed to a certain degree and the self-confidence of the children is not affected [...] (Butterwegge et al. 2003: 262f).

This quote demonstrates the interaction between different resources. There is also empirical evidence for the influence of psychological resources on income. For instance, low self-esteem can influence decision on education (e.g. school attendance) or choice of occupation, which later will influence income (see i. g. Kristen 1999, Bourdieu / Passeron 2007 [1970]): Often continuing higher education is not avoided because of poor performance, but because of a fear of failure confronting new problems (i. g. Burgermeister 2003); such fears are especially harboured by children of parents who are not familiar with institutions of higher education.

This shows that social and psychological resources are unequally distributed and transformable in the same way as resources like education, income and health (discussed above). Disadvantaged groups of the population often lack several resources at the same time. This phenomenon of multiple deprivation is not surprising when you consider the possibility of transformation/conversion: Educational poverty entails income poverty, which leads – for instance in the case of unemployment – to higher (psychological) stress and to de-motivation, which leads, after a certain delay, to health problems. If several resources are limited at the same time, poverty is solidified and structures of inequality are set. But how can the development of a downward spiral be recognised and how can it be avoided? This leads to another set of questions: How does the welfare state influence the individual supply of resources and – considering Amartya Sen – how does this influence life expectancy?

⁸ See Deci / Ryan 1985, Heckhausen 1989, Rotter 1982, Mielke 1982, Bandura 1997, 1992, Schwarzer 1994, Grundmann 2008, Seligman 1986, Schubert 2004: 181, Antonovsky 1997, Keupp et al. 2003: 560.

⁹ A US study showed that five-year-old children are already more concerned with internalising stress syndromes like anxiety, abjection and depression and externalising problem behaviour like fits of rage [[outbursts of fury]] and destruction of toys. Andreas Klocke showed in a German study that children and adolescents who are concerned with poverty are significantly less often members of clubs/associations and less integrated in a clique of friends (Klocke 1996: 399). They often have the impression of not being accepted by their classmates and report more health problems." (Klocke 1996: 401)

3. The Resource-Distribution Welfare State

In welfare state research there are different approaches to compare the productivity of a welfare state. One method compares macro data like financial expenditures for national assistance, for the pension system, for education or health. Countries differ from each other regarding the extent of income (re)distribution that is reflected in the poverty rate (s. a. Knecht 2010: 187f). A second approach is the grouping of countries according to welfare regimes: Esping-Andersen (1990) developed this method by comparing the organisational setups of certain benefits in detail and by clustering similar countries. The developing groups distinguished themselves by different welfare cultures: He called them liberal, conservative and social-democratic welfare states (ibid.). A third approach combines the methods of the first two approaches: researchers scrutinised the relation of social-investive policy, which improves the chances on the employment market, to "classic" social policy, which works by (re)distributing of income inequalities and transfers. Thus countries could be divided into two groups. Leisering (2003: 179) distinguished *social investment* countries from *transfer and redistributive* countries. Allmendinger and Leibfried (2002, 2003) include education policy and education spending for social investment and distinguish between *preventive educational policy* and a *compensatory social policy*. Table 1 shows the features of these political approaches.

Table 1: Features of Preventive Educational Policy and Compensatory Social Policy

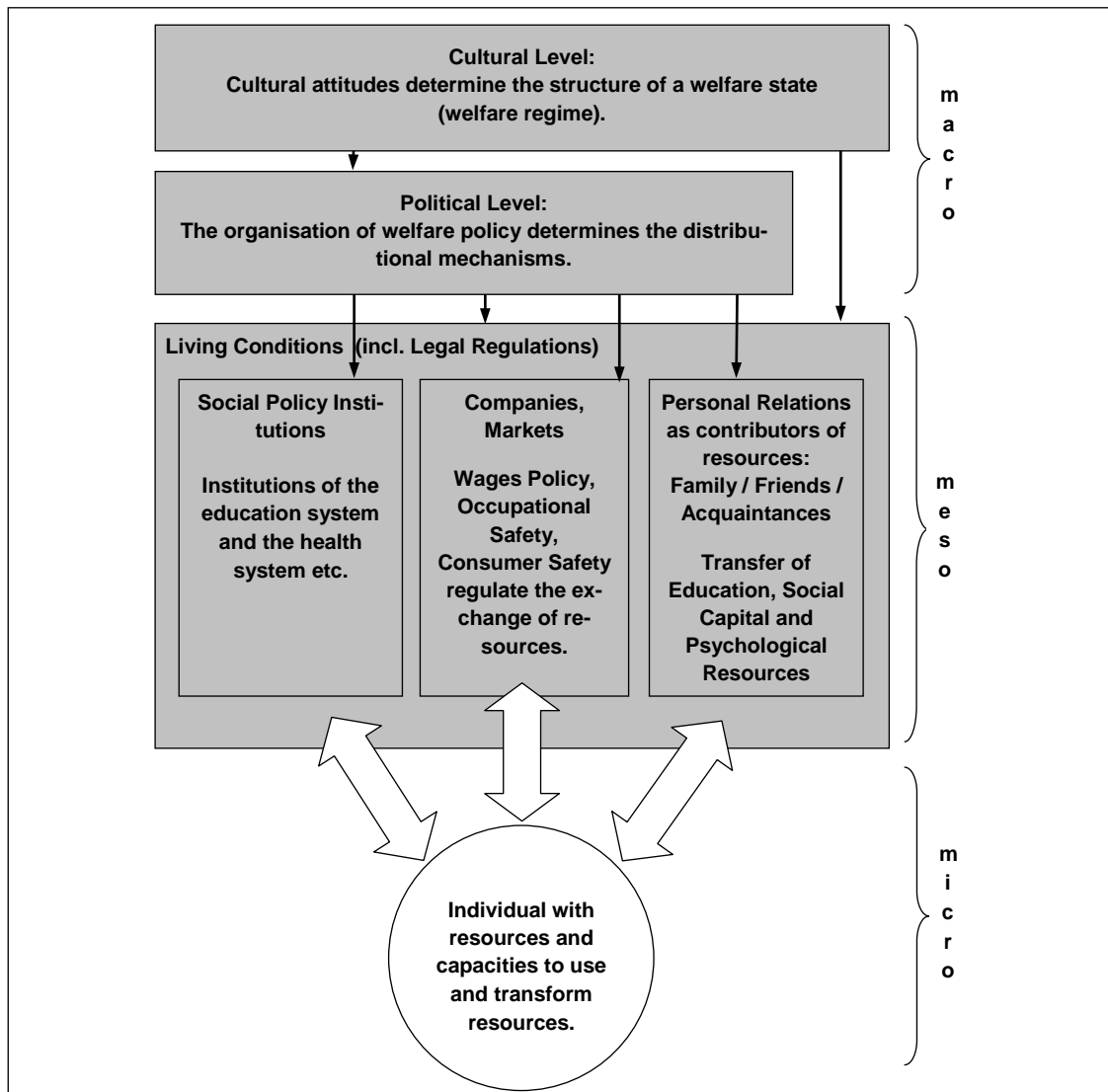
	Preventive Educational Policy	Compensatory Social Policy
Life Phase	Mainly Youth	Mainly older
Time Bias	Prospective	Retrospective
Format	Influencing the preconditions of future market processes	Reacting to market outcomes already established
Typical Social Policy approaches	Acquiring qualification for future developments (service)	Compensatory monetary transfers
Relationship Status	status-creating	status-maintaining

Source: Allmendinger / Leibfried 2003: 64, slightly modified.

Indeed Merkel (2001) was able to show in an empirical study that welfare regimes have different focal points. Countries with conservative welfare regimes were in last place concerning the social-investive expenditure. Access to education which could work as a "central ladder" out of the poverty was not open to them. „This solidifies their lower position in economy and society" (Merkel 2001: 151).

From a resource-based point of view the first approach of the comparison of welfare states—the comparison of macro data—seems inadequate, because the figures on social expenditure (e.g. expenditures on education) don't say anything about which group of the population profits from transfers, although the kind of distribution of such transfers have a huge influence on the effects and meaning—even on health and life expectancy (as an

Figure 3: Multi-Level Model of Resource Distribution and Creation of Quality of Life



Source: Author

outcome-indicator). Additionally the expenditures only represent the input into special fields of social policy, but they say nothing about the efficiency of these measures (result). The second approach, the consideration of welfare regimes, is more concerned with distributional aspects and the organisation of interventions. However here aggregated data are used and mainly monetary transfers are measured (cf. Esping-Andersen 1990). The third approach, the differentiation of *social investment* countries and *transfer/redistribution* countries, overcomes these limitations, though they only refer to the areas of transfers and education. Qualitative aspects of the distribution of other resources are not taken into account.

The resource theory takes a different approach to compare welfare states. It investigates and describes how and to what extent each resource is distributed to special groups of citizens and how these resources are "accepted" and "used" by the citizens. In figure 3 these mechanisms are represented: On a cultural level the given welfare culture forms a

general framework for social political matters. Legal regulations for social political issues determine the institutions and interventions which supply the citizens with more or less resources. The action/intervention of the state influences the resources supply not only directly (when education or monetary transfers are distributed), but also indirectly: Political measures affect the economy, e. g. regulation of minimum wage, and they even influence the relations within families, associations, and social networks in general; for example through tax reductions for families or family allowances. This model aims to make the actual effects of interventions comprehensible and measurable. From this vantage point the resource theory resembles the incidence analysis — the difference is that it deals with more factors than just monetary resources.

4. Survey and Outlook

The resource theory is at the same time a theory about social inequality and a theory about the creation of welfare and quality of life by the welfare state, because it connects the micro and the macro level. The theory consists of two modules:

(1) The first module considers supplying people with resources and their ability to use these resources. On this level the resource theory can serve to describe inequality. It is shown that during the course of the lifetime of a person different resources come to the foreground and therefore could be used as sensible indicators of interventions: Education is an early indicator, because the supply with formal and informal education impacts the future chances of a person. During midlife the supply with the different resources is represented by actual income. In advanced age health and life expectancy can serve as (lagged) output indicators. The quality of health depends on the experienced stress and other burdens.

A multi-resource view can also serve as a base for the discussions of fair(er) distribution, because the accumulation of educational, psychical or social resources is rather invisible, but has an important function in the (re)production on social inequality.

(2) In the second module the resource theory scrutinises the effects of social political interventions by analysing the resource distribution to citizens. Thus a link between the micro and the macro level can be established: The effects of interventions on the micro level can be tracked on the micro level. In this context the resource theory is basically a theory of the welfare state. It can also be applied to gender subjects: Here not only the differences between resource supplies (like differences in income) are important, but the emergence of these differences should be reconstructed. Once again psychical resources (like self-confidence or self-esteem) and social resources, as well as institutional settings might play an important role.

(3) In addition to the abstract approach of *resource accounting* in the first two modules the resource theory also considers qualitative aspects of welfare state research. The consideration of welfare culture and welfare regime improves the understanding of the stiffness of inequality structures and the mechanisms of its continuation. Secondary analysis comparing different welfare regimes shows that a more equal distributions can

neither be achieved solely by monetary redistribution (as proposed by conservative welfare states) nor solely by creating more equal access to education (as proposed by liberal welfare states) (cf. Esping-Andersen et al. 2002). Conservative welfare states though often implement subtle mechanisms which actually help to create rather than abolish inequality. When this effectively increases dependence on social transfers, it could be interpreted as a control strategy. To effect a change of these structures it is very likely necessary to expose these subtle mechanisms of inequality and make this information public.

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