

# **CHANGING PATTERNS OF EUROPEAN FAMILY LIFE**

---

A Comparative Analysis  
of 14 Countries

Edited by  
Katja Boh, Maren Bak, Cristine Clason,  
Maja Pankratova, Jens Qvortrup,  
Giovanni B. Sgritta and Kari Waerness

ROUTLEDGE LIBRARY EDITIONS:  
FAMILY



ROUTLEDGE LIBRARY EDITIONS:  
FAMILY

---

Volume 1

CHANGING PATTERNS  
OF EUROPEAN  
FAMILY LIFE

---



Taylor & Francis

Taylor & Francis Group

<http://taylorandfrancis.com>

CHANGING PATTERNS  
OF EUROPEAN  
FAMILY LIFE

A Comparative Analysis  
of 14 Countries

Edited by  
KATJA BOH, MAREN BAK,  
CRISTINE CLASON,  
MAJA PANKRATOVA,  
JENS QVORTRUP,  
GIOVANNI B. SGRITTA  
AND  
KARI WAERNESS

First published in 1989 by Routledge

This edition first published in 2023

by Routledge

4 Park Square, Milton Park, Abingdon, Oxon OX14 4RN

and by Routledge

605 Third Avenue, New York, NY 10158

*Routledge is an imprint of the Taylor & Francis Group, an informa business*

© 1989 European Co-ordination Centre for Research and Documentation in Social Sciences

All rights reserved. No part of this book may be reprinted or reproduced or utilised in any form or by any electronic, mechanical, or other means, now known or hereafter invented, including photocopying and recording, or in any information storage or retrieval system, without permission in writing from the publishers.

*Trademark notice:* Product or corporate names may be trademarks or registered trademarks, and are used only for identification and explanation without intent to infringe.

*British Library Cataloguing in Publication Data*

A catalogue record for this book is available from the British Library

ISBN: 978-1-032-51072-9 (Set)

ISBN: 978-1-032-53630-9 (Volume 1) (hbk)

ISBN: 978-1-032-53644-6 (Volume 1) (pbk)

ISBN: 978-1-003-41293-9 (Volume 1) (ebk)

DOI: 10.4324/9781003412939

### **Publisher's Note**

The publisher has gone to great lengths to ensure the quality of this reprint but points out that some imperfections in the original copies may be apparent.

### **Disclaimer**

The publisher has made every effort to trace copyright holders and would welcome correspondence from those they have been unable to trace.

# **CHANGING PATTERNS OF EUROPEAN FAMILY LIFE**

A COMPARATIVE ANALYSIS OF 14 EUROPEAN COUNTRIES

Edited by Katja Boh, Maren Bak, Cristine Clason,  
Maja Pankratova, Jens Qvortrup, Giovanni B.  
Sgritta and Kari Waerness

For the European Co-ordination Centre for  
Research and  
Documentation in Social Sciences



**ROUTLEDGE**  
London and New York

First published in 1989 by Routledge  
11 New Fetter Lane, London EC4P 4EE  
29 West 35th Street, New York, NY 10001

© 1989 European Co-ordination Centre for Research and Documentation  
in Social Sciences

Printed and bound in Great Britain by  
Biddles Ltd, Guildford and King's Lynn

All rights reserved. No part of this book may be reprinted or  
reproduced or utilized in any form or by any electronic, mechanical, or  
other means, now known or hereafter invented, including photocopying  
and recording, or in any information storage or retrieval system, without  
permission in writing from the publishers.

*British Library Cataloguing in Publication Data*

Changing patterns of European family life: a  
comparative analysis of 14 European  
countries.

1. Europe. Family life

I. Boh, Katja II. European Coordination  
Centre for Research and Documentation in  
Social Sciences

306.8'5'094

ISBN 0-415-00513-2

*Library of Congress Cataloging-in-Publication Data*

Changing patterns of European family life : a comparative analysis of  
14 European countries / edited by Katja Boh . . . [et al.].

p. cm.

1. Family—Europe. 2. Work and family—Europe. 3. Sexual  
division of labor—Europe. I. Boh, Katja, 1931– . II. European  
Coordination Centre for Research and Documentation in Social  
Sciences.

HQ612.C47 1989

306.8'5'094—dc19

ISBN 0-415-00513-2

88-39976

CIP

# Contents

Foreword	vii
Introduction	1
Part I: Theoretical background	
1. Comparative research and its problems Jens Qvortrup	17
2. Theories and ideologies of family functions, gender relations and human reproduction Edmund Dahlström	31
3. Ideologies about family forms: towards diversity Rhona Rapoport	53
4. Towards a new paradigm: family in the welfare state crisis Giovanni B. Sgritta	71
Part II: Paid and unpaid work	
5. Women between the family and employment Riitta Jallinoja	95
6. Gender segregation in paid and unpaid work Elina Haavio-Mannila	123

7.	Psycho-social dimensions of paid work and family life Nevenka Černigoj-Sadar	141
8.	Tensions between paid working hours and family life Rosemarie Nave-Herz	159
9.	The impact of marriage and children on the division of gender roles Andrée Michel	173
Part III: Reproduction and caring		
10.	Historical changes in the family's reproductive patterns Angelo Saporiti	191
11.	Caring Kari Waerness	217
12.	The male gender role and responsibility for childcare Hildur Ve	249
Part IV: Conclusions		
13.	European family life patterns - a reappraisal Katja Boh	265
14.	Methodological and organisational considerations Maren Bak	299
Appendices		317

## Foreword

This book reports on an international comparative research project on 'Changes in the life patterns of families in Europe' accomplished under the auspices of the European Co-ordination Centre for Research and Documentation in Social Sciences (Vienna Centre) in the years 1979-86 with the participation of researchers from 14 Eastern and Western European countries. The project director was Katja Boh from the University of Ljubljana.

The Vienna Centre, an independent non-governmental institution created in 1963 as a result of a UNESCO General Assembly decision, aims to promote co-operation in comparative social science research, including both Eastern and Western European countries.

The Joint Committee of the Nordic Social Science Research Councils, initiator of the project, has given considerable economic and moral support to the project. National research councils, academies of science and funds have helped finance the national research teams. We wish to thank all these funding agencies for their contribution to the project.

We also wish to express our gratitude to Margaret Sierakowski from England who did the linguistic editing and to Peter Tamási from Hungary who accomplished the stylistic editing of the manuscript. Thanks are due also to Waltraud Salimi and Joanna Ambrus, staff members of the Vienna Centre, for their careful setting of the manuscript.

*The Editors*



Taylor & Francis

Taylor & Francis Group

<http://taylorandfrancis.com>

# Introduction

Maren Bak

## Background of the project

In 1976 a group of Nordic family researchers and the Nordic Social Science Research Councils argued for the need and relevance of a comparative research project to assess the very important changes going on in the family in rapidly modernising European countries. The broad background for the study of the family was the macro-changes in production and working life, when agricultural and handicraft production changed into industrial production and the production of services. We intended to study the interaction between these changes and family and individual life. But two recent social changes must be understood as having immediate external influence on the present study: the changing position of women and the redefinition and challenge of the welfare state.

In the Nordic countries the strong and powerful wave of women's research emerging after the mid-1970s brought into focus the importance of women's entrance into the labour market for both the family and society. It showed a gender-segregated labour market and it focused on the emergence of the post-industrial service society, in which a major part of the service work is performed by women. Feminist research also raised challenges to social research, urging it to become aware of its blindness so far to the situation of women, and it called for more comprehensive research into those social structures which are of vital importance for the fate of women and in which women play an important role - the family being in this respect a very essential unit for research. Feminist research called for attention to structures of power and oppression between the sexes operating on all levels of society, including, of course, the family.

The interest in family research reflected in the present project should be seen in this historical context. Many of the researchers are part of or have created women's research milieux and all of them are of course responding to those societal changes which brought women much more into the focus of research interest.

The other major societal change which is challenging family research and which is a background to the present project is the economic recession and the retrenchment and redefinition of the whole system of social welfare which has taken place in most Western European countries since the late 1970s.

The belief that the state and its institutions could and should provide the bulk of caring, reproductive and socialisation work in society was deeply challenged. The economic recession and cuts in welfare expenditure and the growth in the number of people needing care or support, both as a result of unemployment and of the ageing of the European populations have created a whole set of new questions and solutions to the welfare systems in the European countries. 'Getting back to the people' has been a formula for satisfying the needs and standards of living even in advanced societies through re-establishing the responsibility of individuals, families and local communities for their own well-being. Especially the role of the family in caring for its individual members and raising and redistributing resources became crucially important.

### **Main research questions and ways of analysing the family**

With regard to the changing position of women and the redefinition of the social welfare system - two recent social changes to be paid specific attention to - a group of researchers from fourteen Eastern and Western European countries set out to conduct a comparative study of the interrelationship between changes in production and working life on the one hand and changes in family life and reproduction on the other hand, roughly covering the period from 1945 up to the present. These 14 countries were Belgium, England, Finland, France, Federal Republic of Germany, German Democratic Republic, Hungary, Italy, the Netherlands, Norway, Poland, Sweden, USSR and Yugoslavia (Slovenia).

Of basic interest for this study were the changes which have been produced by the division of functions between family and

## *Introduction*

work, and problems which have arisen as a consequence of the sometimes incompatible and even conflicting demands of the two institutions. Some forces operating in the sphere of work gave rise to work patterns which were not adapted to family life and vice versa, changes in family relationships were not always attuned with the organisation of work. This has created problems for family members in both their working and their family roles.

The main research issue of this study, put in general terms, was this: how do people cope with a growing number of partly new problems imposed on them because of the extended role of working life and public intervention?

This general problem was made more explicit in three basic questions, which served as the framework of the study presented here:

1. What is the interrelationship between the development of new forms of organisation of work and the development of new life patterns in the family at different times and in different social settings?
2. What are the points of compatibility (incompatibility) and what kind of problems arise out of incompatibilities between the world of work and the family? How do the family members perceive and cope with these problems and how does this influence family behaviour?
3. What are the formal (institutionalised) and the informal (non-institutionalised) strategies and arrangements for care and reproduction and their differentiated use by families in various cultural and social systems and economic conditions?

Since the very first proposals for this research project there has been a point of departure remaining unchanged and having been a common view of the involved researchers in spite of the many differences in their theoretical and methodological approach. Namely, the family is seen as a very important social unit. In opposition to the 'withering away theory' which assumes that the family is becoming gradually emptied of its functions and importance and might disappear altogether, we see it as a changing but not disappearing unit which is reacting to but also influencing other social institutions, i.e. the state, the market (especially in the form of the labour market and work) and mediating structures (like kinship and friendship networks, voluntary organisations, etc.) constituting the triangle within which we analyse the family (see Table 1 in

G.B. Sgritta's chapter, which shows the frame of analysis). We do not understand the family as a 'victim' of development but as a social unit reacting to contradictions and pressures towards change and still fulfilling important social functions.

The investigation centres on the family's role in the strains and contradictions between production and reproduction. Whereas theories and policy relating to production are quite well developed, adequate and comprehensive theories of reproduction (where the family is the central institution) are still lacking. One of the project's aims is to contribute to the conceptualisation and further development of a theory of reproduction. This approach requires the rethinking and refinement also of the classical theories of production and work since these exclude the whole reproductive sphere as non-work and non-production.

When we are analysing work here it is in the sense of both paid and unpaid work, thus stressing the interdependence and indispensability of the two and uniting the analysis of production and reproduction. We wish to bring to light the changes in reproductive work and to conceptualise as work many of the functions assumed to be no more than an expression of the emotions and love between family members. The concept of caregiving as work was developed in this project for the first time and the analysis of caregiving constitutes another important part of the study.

The study thus focuses on the family as one playing a part in societal changes, on pressures and contradictions in the situation of the family and of its individual members and on resources and solutions to problems generated in and used by the family. It tries to give an understanding of the general functioning of the family as well as of the social reality of the great number of intertwined, conflicting, differentiated elements which constitute the family.

To meet the purpose of the study, two main types of information have been utilised in the analyses. National statistics and documentary material have been used in writing the national background reports in the first phase of the research. Structured interviews conducted personally with samples of urban population have furnished the new empirical data for the second phase of the research.

The structure of the present book follows the main issues of the research as they were presented above. The first theoretical part gives a deeper presentation of the ways of analysing and reflecting on the family. The following two parts focus on the empirical findings of the research. The part on paid and unpaid work relates to

## *Introduction*

the first two main research issues, analysing the interrelationship between the world of work and the family. The third part moves the analysis from the world of work and production to the world of reproduction and tries to give answers to the third issue, namely the changing family strategies and responsibilities for care and reproduction in various social and cultural systems. Finally the conclusions in the last part give a reappraisal of both the changing patterns of European family life and the methodology used in the analyses.

## **Theoretical background**

The universality of the family as an institution in all societies, and yet the wide variety in its concrete forms and functions throughout history and across cultures, makes it challenging to assess the particular and the universal in family patterns by means of comparisons.

Comparative family research is not a novel phenomenon. Anthropology has already made classical contributions in the field and family history has given insights into the mechanisms of changes in family forms. Also comparative family sociology has its tradition. Many so-called comparative studies, however, appeared in the form of a series of 'parallel' studies of different countries, with the actual comparative work left to the reader.

It is attempted in this project to handle the comparative aspect in a much more ambitious but also in a more risky way: to compare contemporary European family patterns by analysing each of the crucial ones cross-culturally, through trying to assess differences and similarities between nations on each pattern and to come up with system-bound explanations for the differences found. It is an attempt at finding typologies or clusters of the involved nations, by way of linking family patterns to other important social, economic or political patterns.

The conditions of this approach to comparative research are investigated from the point of view of the theory of science in the chapter by Jens Qvortrup. He stresses the need for all the research teams to adopt a common research problem, which is at the same time a comparative problem, relating to those systemic differences which are supposed to be relevant for the patterns to be compared.

Such an attempt is of course daring and ambitious. To unite researchers with different cultural and scientific traditions and back-

grounds in identifying and working on a common research problem is very difficult to fulfil in practice. The shortcomings of our results give testimony to the difficulties. We have not always been able to raise the analysis from the level of 'parallel' descriptions and to incorporate relevant explanatory systemic variables, though it has been attempted in every chapter.

The theoretical chapters give an outline of the theories and ideologies of family functions, family forms and the place of the family in society, and they give the theoretical framework for our research. All the three authors have diachronic as well as synchronic comparative perspectives, emphasising historical changes in the theories of the family as well as the differences and similarities in the theories and ideologies across the East-West dimension. The interaction between the development of society and family forms on the one hand and theories and ideologies about the family on the other is of central interest in this part. It shows the controversies between different theories of the family and their implications for the understanding of the future of this institution as well as for social policy and practice.

In the West the Parsonian structural-functional concept of the ideal family under industrial conditions has been extremely influential. It emphasised as functional the complementarity of the gender roles and thus idealised the nuclear family with the instrumentally oriented man-father-provider and the expressively oriented woman-mother-caregiver. This theory and concept of the family is now heavily criticised from a number of aspects to such an extent that we can talk of a changing paradigm in family research.

In the East we can similarly recognise a traditional idealised notion of the family based on the assumption that as a society moves from a capitalist to socialist form of political and economic organisation, the family will automatically evolve correspondingly. This notion has also been criticised.

Edmund Dahlström, Rhona Rapoport and Giovanni Sgritta all formulate their criticism of these kinds of idealised concepts of the family and the related traditional research paradigms and emphasise the theoretical foundation of the research presented here in opposition to the structural-functional school of thought.

Dahlström goes into a penetrating analysis of dominant ideologies and theories of the family in the democratic capitalist countries and in the socialist countries, especially enlightening the controversy between the 'withering away' theory and the 'indispensability' theory. This controversy is of course linked to the no-

## *Introduction*

tion of the family as either passive or active partner in the process of social change, where the emphasis in our understanding is on the family as an active social unit.

Dahlström and Rapoport emphasise the present development towards an accepted diversity in family forms in both the West and the East. Rapoport stresses that there has always been diversity in the course of history and the family has continually changed. The present changes involve a diversity in structures, for instance non-married couples, one-parent families, reconstituted binuclear families, etc., and a diversity in the roles of the household members.

Dahlström shows that the change towards diversity in family life relates to the changing conditions of and contradictions in the family. He identifies four main contradictions of contemporary family life: (1) the contradiction between production and reproduction, which is reflected in the difficulties of combining parenthood with gainful employment; (2) the attempts of political-ideological institutions to regulate and influence everyday life and the practices/protests and reactions against these attempts; (3) the contradiction between the increased freedom of choice and change in conjugal relations and the need for stability in the children's lives; (4) and finally the contradictions between a patriarchal heritage and ideals of gender equalisation.

Sgritta traces the new paradigm in family research by relating the change in research interest to changes in the social structure, first and foremost to the crisis of the welfare state. He outlines the main features of this new paradigm, which is also the paradigm of the research presented here: linking the behaviour of the family to larger social institutions; greater concreteness in the analysis of the family through growing interest in the private sphere, in everyday life and everyday consciousness, i.e. in subjectivity in the sense that the family is not just analysed as a solid unit but also as a meeting point of different, sometimes conflicting, individuals with different needs, interests and perspectives.

## **Paid and unpaid work**

This empirical part investigates the complicated interrelationship between work and family life from a number of different angles and perspectives. Of importance is the conception of work encompassing paid work as well as unpaid work, whereby we understand all activities classifiable as work but not measured in

economic terms when carried out by household members. Unpaid work includes household tasks, caregiving, work done for kinship and community groups, voluntary organisations, etc.

The part starts by a macro-perspective relating modernisation theory to empirical data on family life and women's work-life careers. It then proceeds to describe and analyse the qualitative differences in content and amount of men's and women's work, paid as well as unpaid, and looks into the mechanisms of tension between working life and family life and strategies for overcoming the incompatibilities between the two spheres. In spite of important cross-national differences, a common picture also appears clearly. A patriarchal heritage is still prevalent in all the European countries researched, with women given lower wages and having poorer conditions in the labour market while at the same time having an overburden of domestic unpaid work compared with men.

Riitta Jallinoja starts with the macro-perspective. She develops a typology of national patterns relating the three variables: the modernity of society, the modernity of family life and women's work-life careers. She shows very interestingly that there is no necessary correlation between the modernity of society and a modern family life. All the countries can be called modern but there are great differences especially concerning the life situation when children are small. The ideal of housewife is still prevalent in some modern countries while in others, on the same level of modernisation, it is not valid any more.

Elina Haavio-Mannila describes the type, extent and consequences of gender segregation in paid and unpaid work, seeing the division of labour between men and women as a social and cultural phenomenon which is possible to change. Functional segregation is common all over Europe. The segregated women's work is connected with low education, employment status and wages. It means more often part-time or shift work and strict control. In all countries segregated women's work is related to human reproduction and service.

In unpaid work there also appears a clear gender division of labour, but there is more variation between the countries compared. The North-South difference is more remarkable than the East-West divide in this respect.

In Nevenka Černigoj-Sadar's investigation of the psycho-social relations between paid work and family life, the focus is on the subjective experiences and feelings of men and women. Her thesis

## *Introduction*

is that from the subjective point of view the two life spheres are strongly interrelated, no matter to what extent family life and paid work are formally segregated. Perhaps her most striking result from the empirical data is that among negative and positive influences the transfer of personal satisfaction from work to family life is most often mentioned and that women more often experience positive influences than men. This experience is shared in all the examined countries.

In the negative or conflicting relations between paid work and family, for the women the family is the source of conflict whereas for the men it is the job. In the women's experience of conflicts there are important differences between countries.

When discussing the uneven share of domestic work and possible mechanisms for furthering a more egalitarian share of responsibilities within the family, a general shortening of working hours has been one of the main requests. Rosemarie Nave-Herz tests the 'time available' hypothesis derived from this argument, namely that the inner familial division of labour is dependent on the married partners' employment and the length of their working hours.

She comes forward with the striking result that the hypothesis cannot be maintained at the general level because it does not apply to both sexes to the same extent.

There was no correlation between the length of working time for men and the degree of their participation in family activities. In contrast, women's working time seems to play some role. The chance of higher participation of men increases with full-time working women, but not with part-time working women.

Andrée Michel finally uses the empirical material to test the hypothesis that marriage and children reinforce the traditional gender role division of labour between the spouses. Her point is that division of work between the sexes need not automatically imply inequality but that patriarchal mechanisms in the present society both capitalist and socialist are still operating and causing inequality between the sexes, which can be noticed in both paid and unpaid work.

## **Reproduction and caregiving**

This part focuses on the empirical findings of our project relating to the most basic functions of the family: reproduction of life and

caring for the growing generation as well as for other dependants. It analyses the changes in reproduction and caregiving as they are influenced by changes in work and employment structures, and by the changing welfare policies and strategies.

The concepts of caregiving and reproduction actually belong under the concepts of paid and unpaid work. They constitute another angle for the analysis, taking the family as a point of departure.

Angelo Saporiti starts by analysing the fundamental reproductive pattern: the reproduction of life through childbirth. His aim is to analyse the changes and decline in fertility in relation to social change, to see which level of analysis (a macro-, meso- or micro-level) is the most fruitful and to investigate what probably the determining factor of contemporary reproductive behaviour is. He points to the importance of looking not only at the macro-level (i.e. national) but at the meso-(homogeneous groups) and micro-levels (family, individuals) as well, since the family is the locus of biological reproduction. At these levels he combines the theory of the transition in the value of children for the parents with the changes in familial power structures accompanying the changes in the mode of production, changes which imply an overthrow of the older male generation's monopoly of power in production and reproduction matters.

Finally Saporiti relates the recent decline in fertility to these explanations of 'the fertility transition' of the last century, and offers the hypothesis that in present day society the status of women has to be introduced as a major explanatory variable.

The changing status of women, especially expressed through married women's permanent presence in the labour market and the consequent internal changes in family relations, is also in the centre of analysis of caregiving in the next two chapters. The expansion in female employment is intimately linked to the expansion of the encompassing societal institutions of service of care, which according to the 'withering away' theory tend to take over more and more of the caring and service functions of the family.

The analysis here goes into a close examination of the caregiving work actually performed by the family and it looks at the possible changes in gender roles in relation to caregiving. Kari Waerness defines caregiving work as caring for dependants on a consistent and reliable basis, whether it is paid or not, no matter whether it takes place in the private sphere or not. She analyses

## *Introduction*

changes in caregiving work in the case of children and that of the elderly family members, as well as those institutions and persons from whom the spouses get help in problem situations.

The analysis reveals quite striking similarities in the countries compared. Both in the East and the West there is a high acceptance of professional care of children over three, while for smaller children it is still mothers who give up work and provide care, maintaining that this is what they want to do.

Looking at the elderly, Waerness states the fact that contrary to common belief even in the states with the most developed public care systems most dependent adults still live in their homes and are taken care of by - almost exclusively female - family members. In problem situations it is again the informal family network and close friends who are relied upon - not professional help in the first place.

Proceeding from this knowledge of the family as a resource in caregiving, Hildur Ve poses the issue of possible changes in the gender roles relating to care, keeping in mind the aim of gender equality and the liberation of both women and men. She states that with few exceptions neither liberal nor Marxist traditions have regarded the ability to care for children as having liberating dimensions. Equality between the sexes must mean not only the extension of men's rights and opportunities to women but also the taking over of women's obligations by men. The possibilities of such a take-over are examined by analysing men's actual share of household chores and the national policies concerning fathers rights to care for small children.

## **Conclusions**

Katja Boh gives a reappraisal of the changes in European family life patterns in the 14 countries as they emerge from the national reports, written for the first phase of the project, and from the empirical data gathered in the second phase.

This chapter is an attempt to give a macro-level picture of the simultaneous variation of three central family patterns: changes (1) in work patterns, (2) in marriage patterns and (3) in the reproductive patterns and forms of parenting. By casting more light on changes in the marriage and reproductive patterns, it fills some of the gaps which were still left in the two empirical sections.

In her analysis the author uses a scale for each of the patterns, placing every one of the 14 countries with a low, medium or high score; and with this scaling as a basis is the convergence and divergence in the changing patterns discussed and analysed in relation to possible explanatory variables (such as economic, socio-political, cultural and religious differences).

The last part of the chapter unites the analysis of the work, marriage and reproductive patterns in an 'integrated' family life pattern. Katja Boh has given this part the heading 'Towards convergence in diversity' and thereby she indicates her major conclusion regarding the changes in European family life patterns.

She identifies three clusters of countries based on their integrated patterns; however, her conclusion is that there are very few common background variables uniting the countries in each cluster. She suggests that variation in family patterns (in toto) cannot be predicted directly from differences either in political systems, economic development or cultural traditions, and that the patterns do not change by following some universal rule. Changes in one aspect of family life may occur independently from developments in its other dimensions, since each pattern might be influenced by specific internal and external forces.

The chapter stresses the complexity of change-promoting factors as well as the complexity and variation of family life patterns.

The common trend in all the 14 countries studied here is, however, the growing acceptance and legitimation of a diversity in family life patterns.

By the analysis and the material presented here and by the conclusions drawn from it we hope to have contributed to new knowledge and understanding of contemporary European life patterns and to the theories of social change as well as to methods of comparing national variations.

The research team is aware of the shortcomings of and gaps in this ambitious project. Many questions could be raised regarding the selection of variables, the validity and comparability of the national data, the selection of samples and the methods of comparison. The final chapter on methodology gives the background information on the organisation, the research plan and the work procedures as they emerged when the scientific ideals met with the reality of conditions for international comparative research. This chapter is intended to make understood the decisions and compromises which are inevitable in a big research

## *Introduction*

project and to assess the empirical foundations for the trends presented in the book.

The diversity which characterises the subject studied here is also a characteristic of the research team that created the project and of their individual contributions to this book. The chapters reflect the diversity in national scientific traditions as well as in individual ways of thinking and writing. We hope that this book will contribute both to the recognition of the fruitful and inspiring qualities in this scientific diversity, which is a characteristic of international comparative research, and to a recognition of the qualities of scientific co-operation across borders.



Taylor & Francis

Taylor & Francis Group

<http://taylorandfrancis.com>

**Part One**  
**Theoretical Background**



Taylor & Francis

Taylor & Francis Group

<http://taylorandfrancis.com>

# 1

## Comparative Research and Its Problems

Jens Qvortrup

### Introductory remarks

Comparative research has a heritage which dates back to the founding fathers of sociology and philosophy, although it can hardly claim to have constituted itself as a scientific discipline proper. One of the barriers is the belief which holds that 'all social research is comparative research' and which seems to indicate that there is nothing new or specific about what is called comparative research.

Much discussion has been devoted to that topic, discussion which in itself is not without interest in the sense that it has tried to elucidate whether comparative research has its own specific methodology or research techniques (see e.g. Mokrzycki, 1979). On the other side I do not feel very much inclined to challenge the statement that 'all research is comparative research' since it is nothing but a truism in the form it is put and thus neither interesting nor fruitful. It only forces us to distinguish between different kinds of comparative research as far as the level is concerned in order to come to the conventional meaning of comparative research, which is research crossing boundaries either in time or in space. Even then it may still be argued that cross-boundary research does not require methods different from other kinds of 'comparative' research. But although the discussion then starts to gain in quality, the main point is missing. The main point is namely not whether a new method can be ascertained or proven, but rather whether the involvement in cross-boundary research promises new insights. That comparative research understood as cross-boundary research does enhance our understanding of social processes appears to be beyond any doubt, and in view of this it is

of secondary importance whether new methods have been applied, or whether we want to name comparative research itself at this level a new methodology.

But what does 'level' mean? It is not enough to say that comparative research in its conventional meaning is conducted at a macro-level, while 'intra-boundary' research is done at a micro-level. In fact, both micro- and macro-phenomena can be dealt with in national as well as in international research, and it is quite possible that both the dependent and independent variables may belong to either level. In order to elucidate this problem, one may refer to the classical canon of comparative research, namely that by John Stuart Mill (1950, p. 211) while distinguishing two fundamental methods of comparison: 'One is by comparing together different instances in which the phenomenon occurs. The other is by comparing instances in which the phenomenon does occur with instances in other respects similar in which it does not. These two methods may be respectively denominated the method of agreement and the method of difference.'

The crucial concepts in this quotation are 'phenomenon' and 'instance'. Broadly speaking, 'phenomenon' is here taken to mean the 'dependent variable' while 'instance' must be understood as the 'independent variable', or, more generally, the causation. The phenomenon is thus something which must be explained by reference to the instance, either directly if the instance constitutes a 'cause' (method of agreement) or indirectly, which is the more complicated case (method of difference). The best known application of the method of difference has been demonstrated by Max Weber - and his conclusion is still much debated. Weber (1904-5) endeavoured to prove that capitalism in Europe originated as the result of a Protestant ethic, which was not found in the Orient, where - e.g. in China - the necessary conditions for establishing capitalism were present, but capitalism did not develop. So the initial 'instances' being approximately similar, the main difference between the two instances - Protestantism - counts as the explanation of the development of capitalism.

Irrespective of the soundness of the substance or the validity of the argument, the methodological importance remains for comparative analysis, namely that the causal factor could only be perceived by recourse to knowledge of other societies. One could have thought of a hypothesis relating 'saving' - *die innerweltliche Askese* - to capitalism, but the hypothesis gains its strength only by reference to other instances where this factor was absent.

Weber's comparative theory is not typical. First, because the method of difference is rather the exception than the rule; secondly, because it moves at the macro-level as to both the independent and the dependent variable. But in principle it is a feasible approach. Much more representative for the mainstream of comparative research is the formulation by another famous comparativist, the French historian Marc Bloch, who states: 'Thus two conditions are necessary to make a comparison, historically speaking, possible: there must be a certain similarity between the facts observed - an obvious point - and a certain dissimilarity between the situations in which they have arisen' (Bloch, 1967, p. 45). So - in Mill's vocabulary - the *phenomenon* must exhibit some similarity, while the *instances* must show a certain dissimilarity. We have to do here with the method of agreement, and at a level which will typically be macroscopic for the instance and microscopic for the phenomenon.

There is obviously no watertight borderline between what are regarded as macro- and microscopic variables, so I choose here the functional definition by Etzioni (1968, p. 49). 'Macro-units (of sociology) are defined as all those units the majority of whose consequences affect one or more societies, their combinations, or their sub-units.' Etzioni allows for intermediary cases, but in general micro-units are then units which do not have societal consequences, but only consequences at the micro-level. This definition is functional in the sense that it takes account of the *consequences*, which means that a unit which nominally may count as a micro-unit, e.g. a family, may be a macro-unit, for instance if it is a royal family or another influential family.

Whether we denote the variables macro- or microscopic, the important thing in comparative analysis seems to be that the 'instance' stands in supra-sub relationship to the 'phenomenon', that we, in other words, have to do with a *hierarchical relationship*, theoretically speaking. In comparative research, according to the conventional definition as cross-boundary research, the instance will typically be society, system, culture, historical period or the like, while the phenomenon may be any kind of sub-unit *vis-à-vis* this instance.

## **Europe's homogeneity and heterogeneity**

For some, talking about Europe would be an impermissible abstraction. And yet it may sometimes be scientifically justified. In a number of sociologically relevant respects Europe can be regarded as an entity. Compared with other parts of the world Europe is a continent whose similarities are more conspicuous than the differences between its countries. Demographically, economically, educationally and socially it distinguishes itself together with other industrialised countries from those of the Third World, but at the same time the history of Europe sets it apart from other industrialised countries outside Europe. When North Americans, for instance, speak about Europe, they have this historic continent in mind rather than its internal differences. And in current political parlance it makes sense to speak of 'the American challenge to Europe' or vice versa.

Speaking about Europe in this abstract way is a way of setting the limits for what we talk about. Globally and historically Europe has so much in common that it would be justifiable to define it as an 'instance' (Mill) or a 'situation' (Bloch) in comparative analysis. This has significance in comparative research not only as a warning against exaggerations of the differences which certainly are there, but more because it may help us define the purpose of comparing Europe's countries along certain dimensions.

As was said above, the general purpose of comparative research is to enhance our cognition, or - more specifically for our study, as was said in the project's proposal - 'the aim of this study is to deepen and refine our understanding of social processes and problems which have emerged as a consequence of the interrelationship between family and work and help to improve programmes and services for the family'. In the proposal - as an argument for making an inter-European project - the differences between the countries are stressed, i.e. the heterogeneity of the area. I will come back to that, but I think it is worthwhile first to dwell on its homogeneity.

There is no contradiction between hetero- and homogeneity, it is only a question of perspective. The very concrete setting, where programmes and services for the family have to be implemented, appears as very complex and heterogeneous, but looked upon from a bird's-eye view it is homogeneous. One mode of production, feudalism for instance, is from one perspective very complex, but in a long historical perspective it certainly exhibits some typi-

cal features, which - and this is important - can only really be perceived when compared to other modes of production.

Claiming that Europe is homogeneous therefore amounts to postulating some factors defining the 'instance' or the 'situation' as parameters. It means that we postulate them to be constant or at least to have exerted approximately the same influence in the different cases. If we, for instance, think of two examples related to our study: birth rate and women's employment rate as our dependent variables (facts or phenomena), both - especially women's employment - show a certain variation among the European countries. The relativity of this impression is, however, immediately seen if the levels of the variables' values are compared to those of the 'instances' of Africa or Asia. In this comparison the variability appears as rather belonging to the same level. The instance of Europe exhibits one level, the instances of Africa and Asia belong to another level. This is all well-known substance, but from a methodological point of view not as trivial as it may sound, since only by means of comparison are we able to give meaning to any notion of level of variable value, and only comparative analysis enables us to locate the parameters which produced the different levels, and which therefore contribute to a social scientific characterisation of the instance. By means of the 'method of difference' we can suggest that 'industrialisation' is the parameter we are looking for, in the sense that certain levels are found where industrialisation is absent, and other levels can be observed where it is not. The instance or the situation of Europe has in this way assumed 'quality': we have located a parameter with explanatory power and presumably with predictive power as well; and we have substantiated the abstraction 'Europe' so that we can claim its homogeneity more meaningfully.

In a comparative study including only European *industrialised* countries it is thus not scientifically productive to stress the similarities among them as far as, for example, birthrate and women's employment-rate are concerned. The similarities are there, but they are demonstrated merely by reference to a parameter, the relative, but approximately common, value of which could only be shown in comparison with non-European countries. It thus gives no more insight to ponder on an explanatory parameter, which in fact only demonstrates Europe's homogeneity. This is thus the importance of Europe's homogeneity: some factors can be kept constant and even if they are very significant in explaining a trend towards similarity in a global perspective, they are of less scientific

importance when it comes to explaining the intra-European variability. The comparison with non-European areas has helped us to reach a *limited generalisation*, which appears to hold for Europe. (It must be said, of course, that even if this is true, the factor 'industrialisation' is not totally ruled out, since *degrees* of industrialisation may still have considerable importance.)

When we turn from Europe's homogeneity to her heterogeneity we shift position from speaking about Europe as one 'instance' to talking about a number of different 'instances', represented for example by culture, common history, political system or by country. This shift has importance in the sense that it will help us - not in explaining the *general* trend common to all of the instances - but rather in *specifying the limited generalisation*, i.e. under what conditions and according to which supplementary factors do our dependent variables differ? Marc Bloch's conditions cited above seem to be appropriate for this situation: Europe's homogeneity makes sure that a certain similarity of the *facts* are found, while her heterogeneity accounts for a certain dissimilarity among the *situations*.

As was the case with the 'instance' of Europe, the different instances within Europe are also as such *abstractions*, but to a lesser extent, since we are now able to speak of, for example, 'the industrialised country X' and 'the industrialised country Y', etc. A further specification of the relationship between instance and phenomenon would amount to finding another parameter which would systematically explain the variance of the phenomenon.

In general terms it is quite easy to think of such parameters, whether we speak of different geographical-cultural areas, historical-cultural areas, areas under differing religious influence or systems under varying political-economical character, or simply national states. The difficulty is of course to formulate operationalisations of parameters so as to bring them to bear scientifically on our common problem. 'Culture', 'history' and 'country' are instances which cannot as such be handled scientifically, it is necessary to translate them into concepts which are measurable or at least open to interpretation. This question is, unfortunately, very often bypassed in studies with comparative pretensions. Too often we learn about variable-differences between countries without being informed about the factors which produced these different results in these countries. A widely used procedure, which may be labelled the 'juxtaposition approach', puts side by side results of variable values from different countries. To the extent, however,

## *Comparative Research and Its Problems*

that it is suggested that this procedure is comparative in the real sense of the term, it indeed presupposes a similarity between 'instances' which in most cases is presumptive and unwarranted. It is in fact begging the question: what is it about the instances, e.g. the countries, which are so similar as to make a comparison between phenomena meaningful?

Nation-states, or countries, do not always coincide with cultural or historical entities, but at least in a short-term perspective they very often do constitute a meaningful common unit, which *vis-à-vis* a problem or a phenomenon through its political and economic structure is making its influence noticeable in more or less the same way. In comparative research such structures are 'disturbing' factors contributing to heterogeneity. But it is possible to think of countries which are clustering around one type of political-economic structures and others which have another built-up in that respect. In the European context one example should be mentioned here, since in an especially pertinent way it illustrates Europe's heterogeneity.

### *The East-West divide*

The division of Europe into countries of socialist and capitalist ones has occasioned quite a number of studies which may be called comparative, although their main target has been the characterisation of the new socialist societies which came to compete with those of the capitalist world. In this context, they are interesting in so far as they paradigmatically underline certain aspects as preponderant in societal development.

The 'totalitarianism/pluralism' paradigm accounts for some differences, the explanatory level being primarily the political one. Stressing the importance of the political level and given the differences between totalitarianism and pluralism, the conclusion is hardly surprising that the way of life in the two systems must be very different. Pluralism will as a matter of principle allow people as far as possible to lead their own lives, which gives way to a great variety of behavioural forms. Totalitarianism, on the other hand, is moulding people to fit its own demands - according to this paradigm. 'Even the socializing functions of the family have been shaped to the regime's demand', it is said (Feldmesser, 1960, p. 252). Under totalitarianism - this paradigm holds - individual