

1 Introduction

Amy G. Mazur and Gary Goertz

Gender and politics researchers have been developing new and exciting concepts and modifying existing concepts since the late 1980s. Their goal has been to make research on politics better account for the realities of gender as a complex process and in doing so to make our theories and studies more accurate and scientifically meaningful; or as we say in the trade, gendering political science. Gender scholars have identified the analytical gaps in existing social science concepts, have suggested how to better incorporate gender into those concepts, and have developed new gender-specific concepts. These reflections on concepts, however, are not systematically assembled in one location. Much work is a fugitive literature, hidden in long research papers, in hard to find specialized research articles, or in chapters buried in edited books. The aim of this book is to assemble expert gender researchers to map out some of the major concepts of current politics and gender research, concepts on which they have spent a good portion of their careers working. While by no means making the claim to cover all concepts, some of the most central concepts in political science and gender and politics research are treated – democracy, representation, the welfare state, governance, development, gender ideology, intersectionality, women’s movements/feminism, and state feminism.¹

It is important to take note of this book’s use of the concept of gender itself. Reflecting current scholarship,² the authors treat gender as a complex process that involves the social construction of men’s and women’s identities in relation to each other. In some of the research covered in this book, gender is used as a synonym for biological sex. For example, in the chapters on

¹ The Appendix describes a website for this book. The website provides a place and a forum for information about concepts not covered by chapters in this anthology. We also see this website as a resource for classroom use; many of these concepts could be assigned as classroom exercises.

² See for example the series of articles on the “Concept of gender” in *Politics & Gender* 2005 (1.1).

democracy and representation, the focus is on women’s roles in politics. The operating premise of this book, however, takes to heart Joan Scott’s initial call (1986) for using the complex version of “gender as a category of analysis” as well as the lead of the plethora of gender and politics research that has taken gender seriously since. Many of the chapters discuss in detail what it means to treat gender as a category for analysis, as well as presenting the vast literature on gender; see in particular Georgia Duerst-Lahti’s chapter on gender ideology. All of the authors clearly state how they use the notion of gender in their conceptual discussions.

Given what we see as the fundamental link between concepts, research, data collection, and theory-building, we develop a set of ten concept construction guidelines, to be followed by all researchers interested in producing scientifically meaningful studies. The guidelines are presented in chapter 2, and the authors in this volume follow them in their specific concept discussions. The guidelines were developed in the context of their application by the authors in this volume. In other words, the lessons learned from the complexities and challenges of conceptualizing gender and politics concepts are used to create better approaches to concept construction more generally speaking. The guidelines presented in chapter 2, therefore, reflect how the intersection between feminist and nonfeminist analysis, embodied by this book more generally, can strengthen our tools for the analysis of any and all political science concepts.

Thus, this volume represents a marriage between a systematic concern for concept formation found in much political science research outside of gender (e.g. Sartori 1970, Collier and Mahon 1993, Adcock and Collier 2001) and the feminist-oriented study of gender and politics that has as its goal to identify the gender/sex-specific patterns of politics and the often inherently gender-biased nature of political science analysis.³ The editors themselves reflect this marriage. Gary Goertz does not work on gender, but he has done extensive work on qualitative methods in general and the methodology of concepts in particular. Amy Mazur has worked extensively in the gender and politics field in general, and has devoted special attention to conceptual developments in this area (see her chapters with McBride). We believe that the confrontation of the general methodology of concepts with the specific concerns of gender and politics scholars will provide benefits and insights to both sides.

³ For more on core analytical meanings of feminism see Mazur (2002). The chapters on women’s movements and state feminism discuss in more detail operational definitions of feminism.

The collective outcome of this volume, we hope, is to move gender and politics research and the field of political science forward toward better analysis and science. In other words, the systematic treatment of gender and politics concepts that follows has the potential to improve the practice of political analysis itself. In this chapter, we first provide the rationale for a book on gender and politics concepts, discussing why it is important to take a systematic and international approach to mapping concepts. Next, we discuss the two major strategies that have been pursued by gender and politics researchers to address gender issues in the development and application of concepts. In the last section, we present our plan and approach by showing how these two strategies structure the book as well as different ways of grouping the chapters with regard to methodological approaches and theory-building.

Why focus on concepts and methods in gender and politics research in a comparative/international perspective?

The beginning of major new research agendas always involves significant attention to and debate about concepts. It is no coincidence that over 150 years ago, J. S. Mill began his famous *System of Logic*, a foundational treatise on the methods of social science analysis, with a long discussion of “names.” Names, better known as concepts, allow us to understand and analyze the world in a systematic way through identifying a set of phenomena and providing us with categories for researching and explaining it. Ultimately, sound concept construction leads us to develop better theories about the complex world around us and evaluate those theories using empirical evidence.

It is thus not surprising that as researchers have increasingly turned their attention to gender as a complex social phenomenon, they are immediately concerned with concepts. A critique of concepts has been central to feminist scientific literature since its inception (Hawkesworth 2006). The concern for concept analysis and the recent turn toward its applications in research among gender and politics scholars is exemplified by the fact that the new journal *Politics & Gender* – the journal of the American Political Science Association’s Division of Women and Politics Research – devoted its first discussion forum to the concept of gender.

Despite the centrality of concept analysis in the gender and politics literature, there is little work that provides systematic guidelines, examples, and the methodology for the construction and use of concepts in empirically based

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theory-building. Some work has taken a normative theoretical approach identifying the weaknesses in thinking on politics from a feminist perspective and identifying new theoretical approaches (e.g. Squires 1999). Other studies identify a single concept to study in both theoretical and empirical terms either by a single author (e.g. Siim 2000, Sainsbury 1999) or a series of contributors (e.g. McBride Stetson and Mazur 1995, Sainsbury 1994, Parpart, Rai, and Staudt 2002). Phillips (1998) republishes some of the most important pieces on concept development in gender and politics from both empirical and normative perspectives. Hobson, Lewis, and Siim (2002) bring together a group of scholars to examine a series of concepts specific to the social policy and welfare state literature and to assess the “contested” nature of the concepts for feminist analysis. Ackerly, Stern, and True (2006) discuss feminist approaches to methodology in International Relations, without mentioning the word concept. But nothing in this literature provides systematic procedures for the construction, critique, and use of concepts.

Work that focuses on the methodology of concepts has done little to provide meaningful guidance to gender and politics research either. While much work has recently turned its attention to the principles of good concept formation in political analysis (e.g. Brady and Collier 2004, Goertz 2005, and Collier and Mahon 1993) none of the books in this area has placed a central focus on gender. Only Goertz 2005 specifically focuses on gender as an issue in concept formation through the “gendering welfare state” literature. Like the divide between quantitative and qualitative analysis, therefore, there is a divide between feminist and nonfeminist research on concepts. This book is an attempt to bridge this second divide, with advantages to be gained by both sides.

To address the feminist/nonfeminist divide, we explicitly link work on concepts and gender to larger literatures on methodology, measurement, and research design. We feel that the way researchers on gender have dealt with conceptual problems can inform the larger debate about methodology. Conversely, explicit comparisons with other work on concept formation and measurement can have important implications for work on gender. Importantly, we stress the intimate ties between conceptualization and theory. One cannot construct or evaluate concepts without considering the implicit causal arguments embedded in them. To discuss concepts without considering how they are used in practice, in categorization, in case selection, in operationalization, etc., means only half the job is done.

We use the term “methodology” in a large sense to cover epistemological approaches, research design, and the tools of data collection and analysis. It

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can be qualitative, such as Sartori's classic article on conceptual stretching (1970), or statistical, as in Bollen's work on democracy (e.g. 1980). In short, methodology means in this volume a wide range of considerations ranging from theory to concrete empirical analysis.

Feminist scholars, those interested in showing how the social construction of sex-based hierarchies play out in the social and political realm, have "problematized" – often in a highly critical fashion – many concepts central to feminist research ever since such research first became prominent in the 1980s. For many, rethinking concepts from a critical feminist perspective was an essential first step in any research enterprise. Many of these analyses were informed by normative feminist theory. Given the breadth of the critical literature, this volume focuses less on the shortfalls in concepts and more on systematizing good procedures and methodology for developing, evaluating, and using concepts in gender-oriented analysis. Over time, feminist scholars have redefined old concepts and introduced new ones to improve the analysis of gender overall. What is lacking in the literature is guidance on concept development and application, in other words the methodology of gender and concepts. What we propose here, for students, researchers, and theorists, is a manual on how to develop and apply gender and politics concepts in comparative theory and empirical research. As such, this book is an essential step in the ongoing research cycle of gender and politics and political science more broadly speaking.

This book takes a decisively comparative and international approach to concepts. Thinking about concepts must include how well the concept "travels" (Sartori 1970) to a variety of cultural and national contexts. To be sure, there is a strong tradition of gender and politics research within individual countries. In the USA, the gender, women, and politics enterprise is a boom industry with obvious practical implications for citizens, activists, and policy practitioners. Thinking about conceptualizing gender and politics from a scientific perspective necessarily implies more cross-national, cross-sectoral, and cross-temporal approaches, and hence takes a comparative eye – a viewpoint that is taken to heart by all of our contributors in their chapters and in their research as well as in the essence of the concept guidelines.

It is also interesting to note that much of the nonfeminist work on concept formation is done in the context of comparative political analysis. A central issue raised in the comparative development and use of gender and politics concepts is Sartori's (1970) "concept traveling." That is, whether concepts can be developed and used in empirical analysis across a variety of national settings. In the infancy of the study of gender and politics, scholars taking

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a comparative approach asserted that the feminist conceptual analysis was ethnocentric, tending to reflect the Anglo-American context. Indeed, many of the early feminist theorists came from the USA or the UK. Conceptual analysis in gender and politics, as a result, increasingly has focused on how to develop concepts that can be applied in a variety of national settings across the globe.

This volume takes seriously these efforts to develop and apply concepts that travel not only across national boundaries, but also across all levels of state and civil society – local, subnational, national, international and transnational – and across time. Recently, feminist analysts (e.g. Hawkesworth 2006) have asserted that to include the complex notion of gender is necessarily to deal with issues of diversity between cultures, classes, ages, etc., and many chapters make this point. In addition, one of the ten guidelines proposed in chapter 2 and followed by each author covers how to make concepts better travel across cultural and temporal contexts. Thus, although some of the chapters deal with concepts that have been developed either in or for the context of western postindustrial democracies – democracy, representation, the welfare state, women’s movements, and state feminism – they all deal with the issue of how to make the concepts applicable to a diversity of cultural and national settings, often outside of the West. In addition, the chapters on governance, development, gender ideology, and intersectionality bring cultural diversity in, both within and across national borders, as a major operating requirement.

This volume is then a methodological reflection on the development of a large body of work that has sought to “gender” political science analysis by systematically introducing gender dimensions into established concepts and gender concepts into the study of politics. The goal of gendering has been to improve the explanatory power of empirical theory-building that uses core concepts as well as the very process of concept formation itself. Political scientists who gender concepts assert that research, methodology, and theory-building that ignore gender as a complex analytical concept are not good science. Thus, by intersecting the methodology of concepts with gender and politics scholarship, this volume’s ultimate aim is better social science.

Introducing gender to concepts: gendering existing concepts and developing new gender-specific concepts

A major common theoretical and methodological operation in the gender and politics literature involves the “gendering” of existing central concepts. By this we mean taking an existing concept and introducing gender, as a

complex concept, into the concept analysis. As many examples illustrate, the gender bias often does not lie on the surface, but lies hidden. Gendering means bringing out and making explicit hidden biases and assumptions in standard conceptualizations. Most scholars reject the “add women and stir” way of introducing gender considerations into the analysis, where sex is added as an additional variable or the analysis examines women as an afterthought. Adding is only one of the many ways gender can be inserted. If one is sticking to mathematical metaphors, multiplication is another. Besides, adding is not always a simple task. To continue with the implicit cooking metaphor, to add salt to a dessert is not a minor modification. If one thinks in terms of catalysts, combining hydrogen with oxygen produces something quite different.

The “add gender and stir” metaphor suggests that the result of the addition of gender is minor. However, the key issue is what happens to the mix after stirring: if the mixture blows up, then the addition of gender is of importance. The key questions are “How does one insert gender?” and “What results?” Adding gender can have catalytic effects that radically transform the original mixture into something quite new. Pamela Paxton’s chapter in particular shows how, by just adding a relatively simple variable of women’s suffrage to categorizing democratic systems, the whole enterprise of regime classifications changes significantly. This then means that one needs to revisit the theories that explain democratization. For example, one might relativize the role played by labor unions and upgrade the importance of other social actors.

An illustration of what happens when a more complex notion of gender is folded into the mix comes from feminist scholarship on the welfare state, taken up in Diane Sainsbury’s chapter. Classic conceptions of the welfare state involved no gender component (e.g. Esping-Andersen 1990). The traditional, and implicit, view was from the perspective of the industrial worker with a nonworking wife and children. Gendering the welfare state involved bringing in new dimensions to the concept to deal with the special concerns of women as mothers, workers, and caregivers (e.g. Orloff 1993 and Sainsbury 1994, 1996). A very prominent concept of the welfare state was developed by Esping-Andersen (1990). Orloff identifies the concept’s three (complex) dimensions:

- A first fundamental dimension concerns the range, or domain, of human needs that are satisfied by social policy instead of by the market.
- A second dimension of policy regimes is stratification . . . This is the question about who benefits from the policies of the welfare state.
- The third dimension deals with the extent to which the welfare state creates “citizenship rights” and result in the “decommodification” of goods and services. (1993: 318)

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In her very influential critique, Orloff inserts two new dimensions into the concept of the welfare state:

Thus, the decommodification dimension must be supplemented with a new analytic dimension that taps into the extent to which states promote or discourage women's paid employment – the right to be commodified. I call this fourth dimension of welfare-state regimes access to paid work. (1993: 318)

If decommodification is important because it frees wage earners from the compulsion of participating in the market, a parallel dimension is needed to indicate the ability of those who do most of the domestic and caring work – almost all women – to form and maintain autonomous households, that is, to survive and support their children without having to marry to gain access to breadwinners' income. (1993: 319)

The insertion of these two dimensions has very wide-ranging ramifications for data-gathering and theory. Among other things it can radically call into question the extent of the welfare state and contest various theories of its formation. It provides the beginning of a massive research agenda on the topic (for a survey see Pierson 2000).

Another approach to gendering is to “adjectivize” the concept. The welfare state example illustrates how the name remains constant – still a “welfare state” – but the content does not. A second option is to add an adjective to an existing concept. The term “women's (social) movement,” also covered in this volume, illustrates how an adjective, “women's,” is attached to an existing concept, “social movement.” Classic logic requires that definitions be stated in necessary and sufficient condition terms (see any philosophical logic textbook, e.g. Copi and Cohen 1990). To affix an adjective means to add a new dimension to the list. It must be a necessary condition like all the other dimensions. In set terms, then, the adjectivized concept must be a subset of the original concept.

It is worth noting that “women's movement” drops the “social.” Here there is an implicit theoretical link to the concept of social movement. The dropping of the “social” is not necessarily merely for convenience; it may reflect some serious theoretical concerns. McBride and Mazur in their chapter argue that women's movements are not a subset of all social movements, and this is why the chapter is in the part of the book on gender-specific new concepts. One way to suggest that women's movements are not just a subset is to take “social” out of the name. While “movement” still implies linkages to social movements, taking “social” out does suggest that it is not merely a subset relationship.

In summary, gendering can have wide-ranging methodological and theoretical influences on concepts. Because the concepts change, case selection can change and the results of previous empirical analyses can easily be called into question. One needs to consider how gender is being inserted and think about the theoretical and methodological consequences of such insertions. Chapters in the book deal with the gendering of democracy, representation, the welfare state, governance, and development.

A second common theoretical and methodological thread consists of the development of new concepts. These new concepts typically tap an unrecognized gender phenomenon that is of central importance to the understanding of political behavior. For example, comparative gender and policy scholars began to use the concept “state feminism” in the 1980s to better understand how the contemporary state in western democracies has dealt with new demands for women’s rights and gender equality (e.g., McBride Stetson and Mazur 1995). Chapters in this volume illustrate how some of the major new concepts specific to gender have been developed and applied. These include gender ideology, intersectionality, women’s movements/feminism, and state feminism.

Core to all concept analysis in the gender and politics literature is that of complexity. The existence of debates regarding standpoint theory and intersectionality, where gender is juxtaposed and intertwined with other group identities and systems of exclusion, illustrates that core concepts in the literature are complex ones. Typically, gender scholars reject simple additive views, the “add women and stir approach,” often implicit in most methodology courses. Students and researchers need models and tools to think about and model complex concepts. While not pretending to be exhaustive, the volume provides some methodological tools for constructing complex concepts. Each chapter deals with the complexity issue. Each shows how scholars have worked to incorporate complexity in terms of additional dimensions, typical of the gendering operation, as well as the relationship between dimensions, a key issue in the chapter on intersectionality.

The approach and plan of the book

In the rest of the book, gender and politics experts use the ten guidelines presented in chapter 2 to discuss nine different concepts. Classic and core concepts in political science that have been gendered are covered in the first part of the

book – democracy, representation, the welfare state, governance, and development. New concepts that have become common currency in gender and politics research are in the second part of the book – gender ideology, intersectionality, women’s movements/feminism and state feminism. In Part I, we start with the widely discussed concept of democracy, in the chapter by Pamela Paxton; move to a related concept, representation, in that by Karen Celis, and then to three other state-specific concepts – the welfare state (Diane Sainsbury), governance (Georgina Waylen), and development (Kathleen Staudt). The gender-specific concepts begin with what is also one of the most general, gender ideology (Georgia Duerst-Lahti), followed by another new but quite general concept, intersectionality (Laurel Weldon). Moving down the ladder of generality, Dorothy McBride and Amy Mazur present first a chapter on women’s movements and feminism and then one on state feminism.

We do not include a separate chapter on gender, since each chapter shows how gender is brought in, and the chapter on gender ideology provides a thorough and up-to-date discussion of current usages of gender. Feminism, another core concept to gender and politics analysis, is also not treated in a separate chapter. The chapters on gender ideology, women’s movements, and state feminism take head-on what is often identified as a contested concept (e.g. Beasley 1999).

It is obviously impossible within the confines of one anthology to cover all concepts relevant to gender and politics scholars, such as power. We present additional important gender and politics concepts not covered in this book on a separate website. The Appendix briefly describes the website. We see it as a place to describe other interesting concepts for gender and politics scholars, and provide some suggested reading on these concepts. We see this site as one where readers, teachers, and students can propose new entries. It can also serve the classroom as a source of inspiration and assignments.

Unlike feminism and gender, democracy, one of the core concepts in political science with dozens of articles devoted to conceptualization and measurement, is treated separately by Pamela Paxton in the first concept chapter (chapter 3). Less than a comprehensive treatment of the highly complex and expansive concept, the chapter concentrates on how to gender current classifications of democratic regimes in comparative politics scholarship. The issue of democracy is taken up in many of the other chapters in the book as well. Karen Celis treats the representation side of democracy in her chapter, and normative issues of democratic performance are broached in the chapter on governance, development, and state feminism. The chapters on the welfare state, women’s