The most valuable of all Capitall; a gender reading of economics texts
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CHAPTER 4: A HISTORICAL AND DYNAMIC APPROACH

Chapter 4

A historical and dynamic approach to Gender & economics

4.1 Introduction

In Chapter 2 and 3 we have seen how the use of biological or cultural concepts of gender differences and masculine perspectives can be indicated by focusing on the text (the first research question). In addition to the use of biological concepts of gender differences and masculine perspectives in these texts, it also became clear that established economic concepts play a considerable role in the reproduction and construction of perceptions of gender (the second research question). To analyze and assess the gendered character of economic texts, including established economic concepts and theories, an analytical concept of gender is required (see Table I, Chapter 1). This will also make it possible to address the third research question 'how to conceptualize the changing relation between gender and economics, more specifically economic texts?' I discuss, apply and elaborate here analytical concepts of gender as developed in women's studies and thus come to a conceptualization of the relation between gender and economic texts that allows for the historical and context dependency of notions of gender used in economic texts.

In section 4.2 the conceptualization of gender and the relation between gender, science and society are outlined and discussed. The relation between gender and economics is more specifically dealt with and elaborated in a typology on gender & economic science. This typology forms the basis for the theoretical framework on the relation between gender and economic science outlined in section 4.3. Section 4.4 contains the operationalization of this framework and an outline of the method applied in later chapters. Section 4.5 addresses the empirical material and the selection of texts and outlines the content of Chapter 5, 6, and 7.

33 I use here the term typology rather than the term 'taxonomy' that is more common in economics. Taxonomies are generally constituted based on empirical findings, while a typology is developed at a conceptual level, as is the case here (see e.g. Bailey 1994).
4.2 Conceptualizing Gender & economic science

4.2.1 Gender as an analytical concept

Besides the usage of the term 'gender' in daily language (referring to a person's biological sex: 'what is that person's gender?'), in women's studies discourse 'gender' refers to the content and meaning given to masculinity and femininity. Sandra Harding, a feminist philosopher, states gender as 'an analytic category within which humans think about and organize their social activity rather than as a natural consequence of sex difference' (Harding 1986, 17). The way content and meaning are given to masculinity and femininity is here topic of investigation and explanation.

To address the workings and mechanisms related to gender and to theorize the social construction and reproduction of gender differences, the term 'gender' is also used as an analytical concept. To distinguish between these two uses of the term 'gender', I refer from now on to the analytical notion by using a capital letter: as 'Gender', the analytical concept is thus distinguished from gender, or notions of masculinity and femininity. I shall continue here with the elaboration of the conceptualization of Gender.

Sandra Harding describes Gender in her widely used definition as 'an asymmetrical category of human thought, social organization, and individual identity and behavior.' (Harding 1986, 55) Harding indicates that '[m]asculinity requires the conception of woman as "other", [...] Femininity is constructed to absorb everything defined as not masculine, and always to acquiesce in domination by the masculine.' (Harding 1986, 55) In this perception, the use of gender (the application of a distinction between masculinity and femininity) is thus considered to be always of a hierarchical and asymmetrical character. According to Harding, it is the use of this asymmetrical category of human thought at various levels in society - together constituting a sex/gender system - that brings about the social inequality between women and men.

There are certain aspects of Harding's analytical concept of Gender that make it less appropriate for use here. First, Harding's concept of Gender links power to masculinity. It is thus the very act of distinguishing between masculine and feminine that expresses and reinforces masculine power. Power effects that are not related to gender directly but that contribute to the bringing about of gender differences are thus not addressed. Moreover, they are excluded from consideration. I consider very useful the distinction between on the one hand power processes (e.g. the accumulation of capital versus labor) that together bring about gender differences, and on the other hand gender processes, through which power is (re)produced (see also Brouns 1993, Schaapman 1995, 21, Scott 1986). The focus will here be on gender processes through which power is (re)produced.

Second, Harding's concept of Gender is rather static as changes in perceptions of masculinity and femininity are not addressed. Thus, it has universalist and a-historic features in the sense that it considers a specific definition of masculinity and femininity applicable to all cultures. Thus, neither changes in contents and meanings of masculinity and femininity

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34 For the importance and content of this distinction see also Schaapman 1995.
35 Schaapman (1995) also uses this perception of gender.
36 In virtually every culture, gender difference is a pivotal way in which humans identify themselves as persons, organize social relations, and symbolize meaningful natural and social events and processes. And in virtually all cultures, whatever is thought of as manly is more highly valued than...
can be addressed, nor the historical and local varying character of the way content and
meaning are given to masculinity and femininity. As these are interests central to this thesis, I
turn to the concept of Gender articulated by Joan Scott.

Joan Scott, a feminist theorist and historian, stresses the importance of the historical
gender context, and the use of language. In her famous article *Gender: A Useful Category of
Historical Analysis* (1986), Scott distinguishes two aspects of Gender: the layered character of
Gender in the sense that gender is defined and confirmed at various elements in social life,
and its power aspect. Scott perceives the definition and use of notions of gender as a means
to (re)produce power relations. She does not however, directly link power to the definition of
masculinity (and femininity). Instead, she advocates that the outcomes of these processes be
established empirically. Scott's concept of Gender thus acknowledges change and variety in
perceptions of masculinity and femininity.

Based on these considerations I start from Joan Scott's definition and regard gender as
being constantly (re)negotiated and (re)defined on multiple levels and in multiple locations in
society in reference to women's and men's ideal, desired or achieved social position,
characteristics and perceived role in biological reproduction. Gender and power are in this
thesis seen as related but also as separable. Social power processes, including gender
processes, are perceived as together constituting gender differences (see also Brouns 1993,

Gender theorists like Harding (1986) and Scott (1986) indicate various levels at which gender
works. Harding refers to these levels as 'gender processes' and Scott as 'elements'. The
levels distinguished in this thesis are the symbolic level, the level of established language, the
level of social structure, and the individual level.

The division into levels applied by the authors referred to above is of a somewhat
arbitrary character; all suggest to some extent different levels, or processes. The way the
distinctions are made is often related to the field in which one works and to the main topic of
interest (see also Tonkens 1998 on this issue).

The distinction of levels in this thesis is based on the idea that perceptions of gender
are at one level to a certain extent independent of the perception of gender applied at another
level. The definition of gender at these levels can be considered as containing its own
momentum and thus justifying a separate analysis. It is, of course, always possible to
distinguish more levels. In the research described here, however, additional levels would not,
in my view, add to the analysis here.

what is thought of as womanly.' (Harding 1986, 18)

37 'The core of the definition rests on an integral connection between two propositions: gender is a
constitutive element of social relationships based on perceived differences between the sexes, and
gender is a primary way of signifying relationships of power.' (Scott 1986, 1067)

38 See also Outshoorn 1989, Schaapman 1995 and Withuis 1990.

39 Harding distinguishes three processes through which a gendered social life is produced - *gender
symbolism*: 'assigning dualist gender metaphors to various perceived dichotomies that rarely have
anything to do with sex differences', *gender structure*: 'the appealing to these gender dualisms to
organize social activity, of dividing necessary social activities between different groups of humans'
and *individual gender*: 'a form of socially constructed individual identity only imperfectly correlated
with either the "reality" or the perception of sex differences.' (Harding 1986, 17-18)
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In the analysis conducted in Chapter 5, 6, and 7 the content and meaning of gender will be investigated by focusing on (see Table I):

- **the symbolic level**: this is the level of more or less socially accepted symbols, ideals and value patterns in and by which, to some extent, meaning is produced in terms of femininity and masculinity. Think for instance of 'God, the Father', 'Mother Earth', 'the American Family' and 'Robinson Crusoe'. One can also think of the male and female heroes in movies, the available role models for girls and boys and women and men. Thus gender can be indicated in metaphors or images, which are used to describe, characterize and value concepts, dichotomies or phenomena, including those that have nothing to do with sex differences, but are characterized in terms of masculinity and femininity.

- **the level of established concepts and language**: At this level gender is given content and meaning through more or less accepted language that sets the boundaries for discussions and indicates the terms which are negotiable. Here one can for instance think of the Mind/Body dichotomy that links masculine identity to the mind or ratio and women to the body, carrying all kinds of normative meanings.

- **the level of social structure**: gender can also be indicated in the structure of social activity; rules and institutions that organize and control the way social tasks and responsibilities are assigned, distributed and rewarded.

- **the level of individual gender**: gender as influencing perceptions of identity and behavior by the individual (body).

The sex/gender distinctions and perceptions of gender at these various levels mutually interact, reinforce or counteract one another. Scott stresses the fact that changes in the organization of social relations always go with changes in the representations of power, i.e. of gender.\(^{40}\) The outcomes of this process have to be established empirically or *a posteriori*, as the outcomes are 'politically' determined and differ according to time, place and context (see Scott 1986, 1074-5).\(^{41}\)

Table I: ANALYTICAL CONCEPT OF GENDER.

<table>
<thead>
<tr>
<th>LEVELS</th>
<th>GENDER</th>
</tr>
</thead>
<tbody>
<tr>
<td>SYMBOLS</td>
<td>Gender symbols</td>
</tr>
<tr>
<td>LANGUAGE</td>
<td>Gendered concepts</td>
</tr>
<tr>
<td>SOCIAL STRUCTURE</td>
<td>Gender structure</td>
</tr>
<tr>
<td>BODY</td>
<td>Gender identity</td>
</tr>
</tbody>
</table>

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\(^{40}\) On the content and meaning of gender given to sex differences, Withuis states that 'these get their form at diverse interfering levels, ranging from the utmost individual to the utmost social, and are subject of development and conflict.' (Withuis 1990, 22)

\(^{41}\) This has to be distinguished from the assessment of the relevance and scientific significance of sex differences before the start of a research project (see Chapter 1, see also Brouns 1993).
Both Scott and Harding are specifically interested in the social and political production of gender differences. Both perceive science as a social and political activity without, however, making a distinction between science and the rest of society. My interest is the implicit and explicit gendered character of economic texts, including the use of established economic concepts in economic texts. The next section therefore deals with the conceptualization of the relation between Gender, science and society.

4.2.2 Conceptualizing Gender, science & society

Turning to the gendered character of science, I address science as a social institution and as a specific or distinct social institution. Harding (1986), Scott (1986) and others such as Haraway (1991), stress the social and political nature of science. Thus, they are in the good company of philosophers and sociologists of science such as Kuhn, Habermas, Foucault, Latour who, however, do not include Gender as an analytical concept in their analyses.\(^{42}\)

There are, of course, a whole range of economic, social and political influences that can be indicated as bearing on the development of economic concepts and texts. These may also to a varying extent be linked to gender. In this thesis, however, I shall concentrate on the gendered character of science, which has been neglected for so long and which can therefore be expected to produce a lot of worthwhile new insights. Science is here considered as a social institution in the sense that it is addressed as an organized and structured social activity, in which use is also made of social sex/gender distinctions and perceptions of gender. Also here, the workings of gender are indicated at various levels.

Science is conceived of as a distinct social institution in the sense that it has a specific aim and a distinct internal development. The aim of science, and at the same time its legitimation, is its claim to produce objective or, rather, value-free knowledge. Scientific value-neutrality is here taken to be based on the perceived division between society and science.\(^{43}\)

The internal development of science has been extensively addressed by Popper, Lakatos and others, who perceived science as a distinct rational endeavor, without however, including Gender in their analyses. Keller (1983b, 1985) indicated that notions of gender, especially gender metaphors, played and continue to play a considerable role in the conceptualization of basic scientific concepts and in the acceptance of theories in physics and in biology. The internal development is in this thesis addressed by acknowledging and indicating the differences in perceptions of gender between science and society. In addition the use of standardized gendered economic concepts in historical economic texts and its

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\(^{42}\) See also Folbre 1993. This does of course not mean that these scholars themselves do not apply a specific sex/gender distinction and perception of gender.

\(^{43}\) Harding makes a distinction between the objectivity of scientific knowledge and value-neutrality, regarding which she states that 'what the defenders of the fundamental value-neutrality, the purity, of science really mean, they say, is that science's logic and methodology, and the empirical core of scientific facts these produce, are totally immune from social influences; that logic and scientific method will in the long run winnow out the factual from the social in the results of scientific research.' (Harding 1986, 40) According to Harding, this view of scientific laws ('natural laws') claims to be based in a reality outside culture, which is presented as requiring interpretation by means of science in order to be applied socially and politically. Objectivity as claimed by most positivists, according to Harding, demands scrutiny of anything, except of science itself.
contribution to the reproduction and construction of gender meanings are investigated.

The use of sex/gender distinctions and perceptions of gender are expected to differ between science and society at large.\(^{44}\) Thus, the social or contextual\(^{45}\) sex/gender distinction and perceptions of gender may coincide and/or reaffirm the *internal* scientific perceptions of gender, but these perceptions may also contradict one another. As was indicated in Table I, the concept of Gender here applied regards gender as being used and reproduced in society at four levels. Table I indicates gender as being given content and meaning at various levels in society and in science, though not necessarily in the same manner. In scientific texts use can be made of both social and academic perceptions of gender.

Table II: GENDER, SCIENCE & SOCIETY

<table>
<thead>
<tr>
<th>GENDER</th>
<th>SCIENCE</th>
<th>SOCIETY</th>
</tr>
</thead>
<tbody>
<tr>
<td>GENDER SYMBOLISM</td>
<td>Metaphors, Basic concepts</td>
<td>Ideals, Metaphors</td>
</tr>
<tr>
<td>GENDERED CONCEPTS</td>
<td>Dichotomies, Concepts</td>
<td>Social Dichotomies</td>
</tr>
<tr>
<td>GENDER STRUCTURE</td>
<td>Academic &amp; social rules, laws</td>
<td>Social rules and laws</td>
</tr>
<tr>
<td>GENDER IDENTITY</td>
<td>Academic &amp; social role models</td>
<td>Social role models</td>
</tr>
</tbody>
</table>

As the focus in this thesis is on economic texts, I shall address the relation between Gender and the reproduction and construction of economic concepts in these economic texts. Scientific concepts are defined and given meaning both within the context of academic debate and traditions, and in a social and historical context. Besides rational considerations or scientific conventions, academic debate makes use of constants outside (economic) science. 'Nature outside culture' or 'science outside economics' (physics and other exact sciences) is referred to and used to found theories on. The biological concept of gender that posits biology as fixed can also be used in this way.

Once observations, concepts and theories have become accepted in science and, in a broader context, within society, these observations, concepts and theories in some cases attain the status of 'facts' and become naturalized.\(^{46}\) When the debate on the definition, occurrence and explanation of a phenomena is over, the 'fact', 'concept' or 'law' remains while its gender

\(^{44}\) This is similar to what Helen Longino does when she distinguishes between constitutive and contextual values. Constitutive values are internal to the scientific community and contextual values are political, social and cultural judgements and preferences (see Seiz 1993, 190-191, see also Longino 1987, 253).

\(^{45}\) N.B.: Contextual does not mean *external* to science, as science is considered part of society.

\(^{46}\) 'Stylized facts' are examples of established data in economics.
value-laden character is lost from sight. This process is referred to as the standardization of facts, concepts and theories. As indicated in Chapter 2 and 3 of this thesis, economists use standardized facts, concepts, and theories to build on, either by elaborating them, or by using them as support, or by arguing against them.

Social and academic acceptance of concepts may prevent change where change is due. Some data, concepts or theories are not only accepted within academia, they also become socially implemented. Some data, concepts and/or theories are accepted on such a scale that, although based on understandings and explanations that are no longer valid, they are very hard, if not impossible, to change. Because social and academic institutions have been built on them and students educated in them, changing them into radically different ideas has become hard, if not impossible. These concepts or theories are then supplemented rather than changed. They are replaced in groups and if not, they may eventually change together with the whole system. The above notions about the acceptance and development of scientific programs are inspired by, but not based on path-dependency theory, which is considered too deterministic for a feminist perspective on the history of economic thought. Like path-dependency theorists such as Brian Arthur (1994) and Paul David (1985), I address real time phenomena. I conceive of science as a social institution in real time and the accumulation or progress of scientific knowledge as both cumulative and revolutionary.

4.2.3 Conceptualizing Gender & economics
Several concepts of Gender have been developed in feminist economics. Ferber & Nelson (eds) (1993) posit the mutual construction of gender and society and the mutual construction of gender and economics. Most feminist economists, however, define gender as working on one specific level. Julie Nelson, for instance, sees Gender as a basic metaphor (Nelson 1995b). Folbre (1994) regards gender as part of the structure of constraints, where Elson (ed.) (1991) sees gender differences as the outcome of social processes. Gender is thus defined at the level at which the research is directed and also where power is located.

Diane Elson describes Gender as 'the social differentiation of women and men through processes which are learned, changeable over time and vary within and between cultures.' She focuses on male bias, 'a bias that operates in favor of men as a gender, and against women as a gender.' (Elson (ed.) 1991, 2-3) She perceives male bias as an asymmetry of power and income between women and men, which she judges in terms of rights and capabilities. Male bias in theoretical notions in economics are identified in notions such as 'workers' and 'farmers' that are implicitly assumed to refer to men rather than to women, positing women as

47 The approach to the historical character of the relation between gender and science here suggested is closely related to the path-dependency, which is applied to the history of economics by, for instance, Van Staveren (1999).

48 Nelson's approach can be seen as similar to that of Harding, especially where she focuses on the identification of the use of gender. Gender is perceived by Nelson as a hierarchical and asymmetrical dualism at various levels in economic science (see also personal correspondence on the report 'Gender, Metaphor and Economics: Can we restore the Balance?', A FENN seminar on Nelson's work, 8/12/1995, Amsterdam).

49 In her discussion of male bias in the economic models of the World Bank and the IMF, Elson identifies three main types of bias: 1) concerning the sexual division of labor, 2) concerning the unpaid domestic work necessary for producing and maintaining human resources; 3) concerning the workings of the household. (Elson (ed.) 1991, 24)
deviant. Her perception of male bias is similar to what I address here as the use of a masculine perspective.

Julie Nelson addresses the gendered character of economic science and indicates gender - especially gender as a hierarchical and asymmetrical dualism - as a basic metaphor in economics. She accepts the use of dualist thought and distinctions in masculinity and femininity as a basic feature of human understanding, but stresses the need to uncouple masculinity and femininity from biological men and women. To Nelson this means letting go of the link between gender and value, undoing the valuation of masculinity as 'good' and femininity as 'bad'.

I follow Nelson where she - unlike Harding - leaves open and suggest exploring and using other, non-hierarchical and more symmetrical ways of perceiving gender. Nelson considers the feminist project as being directed to 'the exploration and valuation of the feminine-positive and the exposing of the masculine-negative.' (Nelson 1995b, 19) Nelson proposes the use of the 'gender-value compass' that indicates how in economic science central concepts and values are associated with masculinity and positive values, and notions such as 'vagueness' are associated with 'femininity' and negative valuations. Nelson advocates acknowledging the negative side of what is linked to masculinity and the positive side of what is considered 'feminine' (see Nelson 1992, 1995b). Thus she implicitly uses gender valuations as a means to feminist power, applying the compass as an instrument to bring certain aspects of reality back into consideration. Nelson's focus is on gender in economics, without however addressing economic science as a social institution.

Nancy Folbre on the other hand deals with gender as a part of the social structure, without however applying this approach to economic science. In Folbre's perception, notions of gender can be considered as part of 'the structures of constraint', which she defines as a set of asset distributions, rules, norms, and preferences that empower given social groups (Folbre 1994). These structures locate certain boundaries of choice, but do not assign individuals to a single position based on ownership of productive assets. 'People occupy multiple, often contradictory positions, because they belong to multiple groups.' (Folbre 1994, 51) Folbre perceives gender in particular as a feature on the basis of which individuals form groups and pursue their interests. Gender, like nation, race, class, age and sexual preferences, is thus considered as the basis of a 'given group' (to be distinguished from 'chosen groups' or 'voluntary groups' that individuals choose to join or leave, although the dividing line between these groups is not always easy to discern). Folbre retains the economic concept of more or less free choosing agents, but in the context of varying and changing constraints. She

50 Nelson (1995b) indicates the influence of this basic metaphor on the definition of the economic agent, on the methods applied in economic science and on the issues addressed in economic research.
51 Nelson propagates an androgenic perception of human agency, which gives equal value to individuation and connection, the ability to choose and the ability to discern what is needed (Nelson 1995, 34).
52 In Who pays for the kids (1994) Folbre makes use both of neoclassical concepts of freedom of choice and the Marxist notion of the influence of social and political structures and institutions on economic behavior and criticizes economists for overlooking the importance of Gender to economic life.
53 Folbre refers here to religious heritage and to the issue of using the term 'sexual preference' or 'sexual identity' (Folbre 1994, 49).
conceptualizes them not as purely self-interested utility maximizers, but as 'purposeful agents who make decisions to buy, to sell, and to engage in various social activities. Their choices are affected by relative prices and probabilities of gain, the economist's traditional arbiters of efficiency.' (Folbre 1994, 38) The mechanisms of group identity and interest shape and are shaped by social institutions which, in turn, systematically strengthen certain groups and weaken others. (Folbre 1994, 48)

Folbre's approach makes it possible to account for a distinct and active contribution by economists to the construction of masculinity and femininity. On the other hand, like any other individual, economists can also be considered to be faced by a structure of constraints. Folbre acknowledges the boundaries set by available symbols, laws and rules, by social norms and perceptions of gender identity and by all kinds of previously made choices. Her conceptualization of agency is especially useful to localize people and to indicate the limits of choice and the social and political influences that significantly, though never entirely, determine their behavior.

Strassmann (1993) and Strassmann & Polanyi (1995) concentrate on the use of language and show how economic discourses reproduce power relations and construct a perception of the world, and of gender and race relations that coincides (or not) with the ideal image of the white American middle class family. Feiner (1995) stresses the unconscious and psychological interests of economists in neoclassical economics; the promise of direct and total wish fulfillment as the state of utter economic bliss that is represented by the neoclassical concept of the Market in full equilibrium. Both feminist economists provide considerable insight into the reproduction of the interest (emotional and other) economists have in the well-elaborated worldview expressed in the dominant economic paradigm and in the role texts play here.

Economic texts are in this thesis investigated in relation to the four levels at which the use of gender can be identified (symbols, concepts, structure and identity). As economics is considered as a social and as a specific social institution, attention is paid to both the use of social and of academic perceptions of gender. As was indicated in Table I, four levels are distinguished in economic science. At each level, gender is given content and meaning more or less independently from other levels. In every economic text, these levels are present and can be distinguished. In economic science these levels increasingly coincide with institutional boundaries (see also Lawson 1999). At these levels - the levels of meta-research, of theoretical research, of empirical research, and of data construction - perceptions of gender may differ and negotiations and redefinitions of gender are expected to occur.

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54 The choices made are affected not only by costs and probable benefits, but also by social structures, which themselves are partly formed by choices made earlier. According to Folbre, asset distributions, political rules, cultural norms and personal preferences all locate individuals that foster a range of different types of collective identity and action.' (Folbre 1994, 40)

55 Scholars such as Marx stressed the political character of economics. Others such as Coats, Hodgson, Mäki and Hands also recently pointed out its social character. Neither of them however, addressed the importance of gender in this respect (Folbre 1993).
Table III: TYPOLOGY OF GENDER & ECONOMICS & SOCIETY

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<tbody>
<tr>
<td>GS in philosophy of economics</td>
<td>GS in theoretical economic research</td>
<td>GSs In emp. Economic Research</td>
<td>GS In the construction of data</td>
<td>GS in society at large</td>
<td></td>
</tr>
</tbody>
</table>

| Establ. Gendered Concepts (EGC) | EGC in philosophy of economics | EGC in theoretical economic research | EGC In Emp. Economic research | EGC in the construction of data | EGC In Society |
| EGC in the construction of data | EGC In Society At large |

| Gender Structure (GStr) | GStr in philosophy of economics | GStr In Theoretical ec. Research | GStr In Empirical ec. Research | GStr In the construction of data | GStr In Society |
| GStr In the construction of data | GStr In Society At large |

| Gender Identity (GI) | GI in philosophy of economics | GI in Theoretical ec. research | GI In Emp. Ec. Research | GI In Data Construction | GI In Society |
| GI In Data Construction | GI In Society At large |

In this typology power is perceived as diffuse, as an aspect of relations and as significantly constituted by the positions people occupy (see also Lawson 1997). In considering what is open to free deliberation, choices and decisions, and what has to be considered as independent of the agent, Giddens' term 'duality of structure' applies. Duality of structure refers to the fact that structure is both a condition and consequence of action (Gremmen & Westerbeek van Eerten 1988; Lawson 1997). By applying a historical and dynamic approach to economic science this can be made visible and investigated. This also accounts for the use of standardized gender notions, which have become part of social and academic institutions. In her valuable overview of the possible use of theories of power by Lukes, Elias, Foucault, Giddens and Bourdieu in feminist studies of labor relations, Brouns (1993) stresses the importance of acknowledgement of the acquiescence in gender power notions that have become part of social institutions (Brouns 1993, 137). What remains to be said on this topic here is that the relation between theories on power and gender and their analyses continues to be problematic (e.g. Brouns 1993, Braidotti 1990, Butler 1993). It is not my hope however, nor my aim to solve these here.

Designing this typology is part of what Bailey characterizes as the classical or deductive strategy in the use of typologies: 'forming a combined conceptual/empirical typology by first forming the concepts and then searching for empirical cases.' (Bailey 1994, 32). Bailey and others (see Hammond 1997) discuss the danger of a-historicity of taxonomies or typologies. In order to obtain an insight in the processes that brought about the situation at
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hand - and to avoid ascribing an independent ontological status to this typology - the present state of economic science and the applied sex/gender distinction and perceptions of gender are perceived as the outcomes of a historical process.

4.3 A historical and dynamic approach to Gender & economics

I have chosen to investigate texts from three periods in the history of economic thought: early political economy, early neoclassical economics and the recent period. Thus it will be possible to assess changes in the use of sex/gender distinctions and perceptions of gender in economic texts. By addressing a long period of time (1650-2000) it also becomes possible to investigate changes in social and academic contexts and the development of economic concepts, whether or not in relation to perceptions of masculinity and femininity.

Perceptions of gender and economic concepts are subject to an ongoing process of redefinition in science and more broadly in society. This process of redefinition, however, is not fully flexible but to a large extent limited by accepted symbols, institutions and regulations, accepted knowledge and language and conscious and unconscious behavior and habits. These tend to (re)produce established gendered concepts and limit the extent in which a change in the perception of gender is possible. But a changed gender context sometimes requires and even invokes a redefinition of economic concepts. Radical changes in economic theory or scientific revolutions can be expected to accompany or even to be brought about by redefinitions of gender.

A text emerges and is positioned by the author both in an academic tradition and in a social context. Although the author may very well view him or herself as autonomous, he/she is here seen as being only partly so: his or her behavior is perceived as partly based on autonomous deliberations and choices, and at the same time as limited by historical institutions, power mechanisms and available language. Thus I take a middle ground between those who perceive 'everything as text' and science as mainly power-driven, and those who overstate the certainty of knowledge and power of scientists to choose and act freely (see Seiz 1995). Therefore, the issue at hand and the historical position of the author/economist are considered relevant in determining the extent of the power and autonomy of the author. This makes it possible to indicate the freedom (and the responsibility) of the author for the redefinition and construction of notions of gender and his or her use of the options for change.

Economic texts are of a dual nature: they are a means in the negotiations over gender and power and also the results of these negotiations. As many influences and considerations play a role in these negotiations, the outcomes can only be established a posteriori (see also Scott 1986, Lawson 1997). Concrete seminal texts are also historical representations that are constantly re-read and reinterpreted by scholars. This is done within a different historical context from the one in which the text was written, where perceptions of economic and gender relations were different. Meijer (1996) indicates that texts acquire content and meaning in a

56 I thus go along with Nelson (1995b) who characterizes the agent as 'a person in relation'. Compare also Lawson (1997) who stresses the power aspects of relations, characterizing social life as relational and, as constituted by the positions people occupy (Lawson 1997, 163).
context of literary, cultural and social conventions, and are read by people who are themselves part of and socialized in these networks of conventions. The term 'economic discourse' will here be used in a limited sense, leaving aside a broad range of implicit and explicit texts in the economic discipline which together define and (re)produce power and gender relations.

Considering science as a social institution, texts are seen as using and applying social, political and other cultural features of society. What is selected, used and stressed by the author of these texts, is, albeit in various ways and to a varying extent, related to the social, political, economic and gender position the author takes. The focus on use and making references in the text differs from the more conventional perception of the working of 'influences', which implies another conception of direction and causality.

In the short run economic texts are expected to make use of some current but mostly of lagged social symbols, structure, etc. In the long run, it is expected that some scientific concepts and products are used in society and, in turn, references to social changes and new perceptions of gender are made in science. Though social perceptions of gender may change over generations, it takes time and changes are expected to show a lag before they are adopted in science. In a similar manner this is also expected to be the case for new economic concepts and theories and their social acceptance. Thus the analytical distinction between society and science and the analysis of economic texts from various periods in the history of economic science, makes it possible to account for the reflexive effects of perceptions of gender between economic science and society.

Fig. II: A HISTORICAL AND DYNAMIC APPROACH TO GENDER & ECONOMICS

Since the implications of applying the analytical concept of Gender in historical accounts of economic science are substantial and fundamental, a framework such as the one here proposed requires much more elaboration to fully deal with this issue than is possible in the course of a thesis. In the following chapters I intend to show the value of this approach as it stands now through the new insights and perspectives that are produced in its use.
4.4 Operationalization and method of analysis

In Chapters 5, 6 and 7 I shall analyze texts by successful pioneers in the history of economic thought. To operationalize the framework discussed in the previous sections, three main fields of focus are distinguished around which the analysis of these texts evolves: the use of sex/gender distinctions and perceptions of gender, the intertextuality of gender in texts, and the contextuality of gender in texts.

4.4.1 The use of sex/gender distinctions and perceptions of gender

The method of analysis of the use of sex/gender distinctions, perceptions of gender and masculine perspective (e.g. by 'reading as a woman') has already been discussed in Chapter 1 and applied in Chapters 2 and 3.

In historical texts, however, we stumble on a new problem and that is the use of the term 'Man', 'man', and 'men'. In literary texts there is generally no problem of identification of the perceived sex of the main character(s) in the text, and thereby the sex of the focalizing characters. Older political philosophical texts, however (roughly texts dating from before the 1960s) speak mainly of 'man', 'men' and 'Man', without being explicit about the sex of the person that is referred to. By now, there is a body of literature on the gendered character of 'Man', which shows that the characteristics and features ascribed to 'Man' are masculine. Instead of claiming this for economic texts, I shall examine the texts to see how these terms are used and given meaning.

To identify the gender meaning of 'Man' and 'man' we need information about the gender of the narrator, the focalizor and the assumed audience. The question of who is or are the assumed reader(s) of a specific text can be answered by reference to the context in which the text is produced. In addition, the way women are mentioned in the text can help us here. 'Man' as an universalizing concept of human beings, as the abstract and general reference to the 'human race', will in most texts appear to be gendered: 'Man' is described and defined by specific features which are articulated in association with men, and in relation and mostly in opposition to women. When the focus is on the text only, it may be possible to read 'Man' as generic. Even when read more closely, in some cases the gender meaning of the term may remain ambiguous. When attention is paid, however, to the intertextuality and contextuality of the term (how was this term used in other academic texts, and whom did it address or refer to) most of the ambiguity vanishes.

After the identification of the use of sex/gender distinctions and the gender meaning given to 'Man', 'man' and 'men', the analysis in the next three chapters will focus on the intertextuality and contextuality of the text at hand to indicate the implicit and explicit perceptions of gender and its impact on the economic content of the text (see also Table V at the end of section 4.4.3).

57 See e.g. Moulton 1977, Spender 1980.
4.4.2 The intertextuality of gender in texts

Economic texts acquire their meaning not only from their own structure and content.\(^{58}\) The meaning of a text is significantly constituted by the relation of a text to other texts; to that, which already has meaning (Meijer 1996, 18). The term \textit{intertextuality} refers to the way texts make use of older and more recent texts, to the body of shared concepts, theories, stories and other texts in a culture (e.g. the Bible, fairy tales).\(^{59}\) Economic texts will refer predominantly to other academic texts.

Relevant here is, as stated above, the academic position of the author of the text: is (s)he for instance, a pioneer, a problem solver, or someone who reports on the state of the art or an acknowledged genius? If the text introduces many new insights and concepts, the author is expected to limit other issues that require negotiation as much as possible, and, for instance, to fall back on perceived shared notions of gender, class and race. Texts that are less controversial in their economic content can be expected to have more freedom to make nuances in this respect.

Meijer (1996) gives an overview of the various ways texts are interlinked and of the way these interlinkages can be analyzed. She distinguishes three main types of intertextuality:\(^{60}\)

- \textit{The direct use of a specific text, which is still traceable ('references to traceable texts')}; economic texts refer and make use of preceding texts, use references to texts by established colleagues and/or great economists: the economic canon.

- \textit{The genre conventions applied to the form of the text ('the use of genre')};\(^{61}\) the form rules for a text that characterize the text as a specific sort of text. Examples here are the specific form rules used for fairy tales ('Once upon a time...'), newspaper reports, poems etc. In economic science texts are subject to similar rules and conventions, which themselves are subject to change. It has, for instance, only been usual for a few decades for economic articles to contain a considerable amount of mathematics.

- \textit{The use made in a text of more general 'culture texts' of which the source is no longer traceable ('references to untraceable or culture texts')};\(^{62}\) the broader 'culture text' gives content to definitions of gender in a less explicit manner.\(^{63}\) The culture text provides the available images and affirms specific perceptions of gender. The term 'culture text' is here used for established stories and metaphors in the academic discourse, economic and non-economic.

The analysis of the intertextuality of the texts under scrutiny will predominantly deal with the references in texts to other scientific texts, the three aspects of intertextuality outlined with the references in texts to other scientific texts, the three aspects of intertextuality outlined

\(^{58}\) Or as Meijer puts it: 'A sexist text never comes alone' (1996, 15).

\(^{59}\) Instead of, for instance, analyzing the influence of Newton's perception of natural law on Smith's work, I discuss here the way Smith refers to 'Nature' to express his perception of man's moral behavior and of the economic system.

\(^{60}\) Meijer takes the point of view that at these various levels, the canonical texts already contain hierarchical definitions of gender, which require a 'polemic intertextual traffic' of new texts that start from other perceptions of gender and require a different kind of reading about which more later in this chapter. (Meijer 1996, 38)

\(^{61}\) Please note here that the term 'genre' is not used here in the French meaning of 'gender'.

\(^{62}\) See Meijer 1996, 38.

\(^{63}\) Meijer refers to 'culture text' as 'the constellation of accepted and reoccurring motives and representations on a specific theme'. (Meijer 1996, 33)
above do not coincide with what was distinguished as the level of gender symbols, gendered concepts, gender structure and gender identity in economics science. The use of traceable texts, untraceable texts and genre referred to together will cover these four levels. Together they supply instruments to investigate the embeddedness of a gendered text within economic science.

4.4.3 The contextuality of gender in texts
To investigate the way economic texts have been constituted within the historical social context, I shall discuss the extent to which the social and political context is either taken for granted or as still under discussion. Linked to that, I shall investigate the use that is made of gender at the levels of gender symbols, established concepts, gender structure and gender identity. The way texts acquire their meaning in the historical social context is here referred to as the contextuality of an economic text.

Relevant here is, as was stated above, the author’s social and economic position. Economic and social position will importantly determine his or her social and economic independence and thus the freedom to decide whether and how to make use of notions of gender. In addition to this issue, attention will be paid to the use in the text of (see Table II):

- Gender symbols: those stories and symbols that are widely known, both in science and in society. Through the use of such symbols a specific definition of gender is introduced in the text and in the argument. The use of the narrative of Robinson Crusoe, for instance, was very popular in various kinds of academic texts in the eighteenth and nineteenth century (see e.g. Hewitson 1993, 1999, Grapard 1995). Although other symbols were also available such as the Robinson Family of Stevenson’s Treasure Island, the Robinson Crusoe story apparently had greater appeal for economic scholars.

- Established gendered concepts: socially accepted concepts and distinctions that have a gendered character and structure social and/or political behavior. The dichotomy of 'Private' versus 'Public' can be considered as such a notion that carries with it a whole set of meanings and prescriptions.

- Social gender structure: the social and political structure consisting of institutions and rules that direct behavior, and that are for the moment under consideration generally considered as unchanging, as constant. Some of these institutions, norms and rules are based on perceptions of gender difference (for instance, marriage laws).

- Gender identity: the perception and meaning of the differences and similarities between women and men has been subject to change over the centuries, being successively localized in the uterus, the hormones and genes. I address here the way the text refers to gender identity and makes use of dominant social perceptions of gender identity in the historical context.
### Table IV: OPERATIONALIZATION: FINAL METHOD OF ANALYSIS

<table>
<thead>
<tr>
<th>Textual analysis</th>
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<tbody>
<tr>
<td>(applied in Ch. 2 &amp; 3)</td>
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<tr>
<td>- following the text like a road</td>
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<tr>
<td>- main characters</td>
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<td>- main voices</td>
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<tr>
<td>- positions &amp; perspectives:</td>
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<tr>
<td>'reading like a woman'</td>
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<table>
<thead>
<tr>
<th>Historical analysis</th>
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<tbody>
<tr>
<td>(additionally applied in Ch. 5, 6 &amp; 7)</td>
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<tr>
<td>Intertextuality:</td>
<td>Position of the scholar in academia</td>
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<tr>
<td>Use of references to</td>
<td>traceable texts</td>
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<tr>
<td>- genre</td>
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<tr>
<td>- untraceable texts</td>
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<tr>
<td>Contextuality:</td>
<td>Position of the scholar in society</td>
</tr>
<tr>
<td>Use of references to</td>
<td>gender symbols</td>
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<td>- gendered concepts</td>
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<td>- gender structure</td>
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<td>- gender identity</td>
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### 4.5 Empirical material: selection of periods, authors and texts

As indicated in Chapter 1, the empirical material of this thesis contains texts by well-known economists. These texts are not dealt with as a source of information about historical economic reality, but as part of the historical context. The texts that will be scrutinized in the following chapters are important historical documents that were at the same time a result of social and academic developments, and themselves provided frames of reference for later discussions both inside and outside the economic discipline.

The economic texts I selected for scrutiny are successful pioneering texts or, as most economists are used to saying, seminal texts; these texts are widely accepted by the discipline and perceived as pillars of the field. If I would have been interested in economists' perception of women, I would have chosen other texts. The interest here is, however, in the use of gender notions in economic texts, which compels me to turn to economic texts central to the discipline of economics. My choice for pioneering texts is based on the presupposition that texts, which propose new ideas and explore new topics and/or approaches have to establish their credibility. This can be done in various ways. Where textbooks or report on the results of 'normal research' in the Kuhnian sense may leave many shared assumptions implicit, authors of pioneering texts will to some extent be forced to use external points of reference that will enable them to found his/her views and to get them launched. It is in these pioneering texts that I expect to read as explicitly as possible the way these (re)definitions are put together and...
constructed in relation to the economic reasoning proposed in these texts. These texts are also still read and referred to today, albeit usually without recognition of its gendered meaning.

I selected texts of two periods in the history of economic thought in which new economic perspectives and theories emerged - the early classical period and the early neoclassical period. Hutchison (1987) sees the pre-classical period as starting in 1662, the date of publication of William Petty's *Treatise of Taxes and Contributions*. The end of this period is set as 1776, the year of publication of Adam Smith's *An Inquiry into the Nature and Causes of the Wealth of Nations*. From this period I will address texts by Sir William Petty (1623-1687) and Adam Smith (1723-1790), being two major, pioneering authors writing on Political Economy.

The early neoclassical period - by many also considered as 'the marginalist revolution' - is regarded as beginning around 1870 and more or less concluding around 1890 (Collison Black, Coats & Goodwin (eds) 1973, Hutchison 1978, Schabas 1990). This period showed changes in policy objectives, the emergence of social movements and some major changes in the theoretical framework of economic science. The subject matter of economic science shifts from the wealth of nations and the cost-of-production-theories of value to the maximizing economic behavior of individuals and the consumer's equilibrium at which marginal utilities of all commodities purchased are proportional to their price (see also Collison Black, Coats & Goodwin (eds) 1973, 337). These shifts are reflected in a change in the name of the field from 'political economy' to 'economics'. From this period I address texts by William Stanley Jevons (1835-1882) and Alfred Marshall (1842-1924).

Chapter 7 contains a revisitation of the texts from Gary S. Becker (born in 1930) and John Pencavel (born around 1940) analyzed in Chapters 2 and 3. These texts can be located in the period in which 'economic imperialism' attained predominance.
4.3 Empirical materials: selection of periods, and clustering analyses

As indicated in Chapter 1, the empirical context of this study is world-economy. These texts are not about words as a means of describing a fragmented economic reality, but as part of the financial context. The empirical data will be selected by the following chapters, important historical documents that were the same time of social and academic developments, and those related with matters of relevance. In these documents both inside and outside economic disciplines.

The economic texts selected for the study are understood to be those without economic disciplines where economic terms are used to convey, explained, and perceived as milieu of the field. If I would have taken as the discipline, you would be brought to economics, especially to the discipline of microeconomics. My choice for pioneering texts is based on the presuppositions that these texts, which produce new ideas and explore new logic, literal approaches have to establish new credibility. This can be done in various ways. When it becomes evident on the results of the empirical research in the Knudsen 1993 they lead many interpreted sociological implicit, author to pioneering texts will no longer to have as one means of reference that will make them to found another version and to get them the multidisciplinary. It is in these pioneering texts that, from my point of view, they are put together and