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## **History, institutions, and selectivities in historical-materialist policy analysis: A sympathetic critique of Brand's *State, context and Correspondence***

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Keywords: selectivities, historical materialism, institutionalism, state theory

This contribution shares Ulrich Brand's reliance on critical theories of the state and hegemony. Based on three points of criticism, the author argues for a better elaboration of the context of policy making. First, he proposes to consider a broader range of theoretical currents than the interpretive accounts introduced by Brand: (1) A strategic-relational interpretation of historical institutionalism will be introduced, (2) featuring the concept of "periodisation" for a systematic understanding of historically evolving structures. In addition to the introduction of a broader range of theoretical currents, (3) Brand's proposed concept of "selectivities" will be further refined and specified to be better able to grasp the workings of the "institutional condensation of the correlation of forces" in the policy cycle. The proposed conceptualisation of historical-materialist policy analysis will be exemplified by a short stylised example of research on equality-oriented policies in South Africa.

### **Geschichte, Institutionen und Selektivitäten in historisch-materialistischer Policy Analyse: Eine solidarische Kritik an Brands *Staat, Kontext und Korrespondenz***

Schlüsselwörter: Policy-Analyse, Selektivitäten, Historischer Materialismus, Historisch-materialistische Policy Analyse, Institutionalismus, Staatstheorie

Der Autor dieses Beitrags greift wie Ulrich Brand zentral auf kritische Staats- und Hegemonietheorien zurück. Ausgehend von drei Kritikpunkten schlägt er vor, den Kontext des Policy Making stärker zu berücksichtigen. Eingangs stellt er andere theoretische Strömungen vor als die von Brand vorgeschlagenen interpretativen Zugänge: (1) Ein strategisch-relationaler historischer Institutionalismus kann, unterstützt durch (2) „Periodisierung“ und Konjunkturanalyse, dazu beitragen, historisch produzierte Strukturen zu analysieren. (3) Schwerpunkt der Auseinandersetzung ist dann die Kritik an Brands Konzept der „Selektivitäten“, das weiter ausdifferenziert wird, um die „institutionelle Verdichtung von Kräfteverhältnissen“ in Policies besser fassen zu können. Die vorgeschlagenen Ergänzungen für eine historisch-materialistische Policy-Analyse werden mittels eines kurzen stilisierten Fallbeispiels gleichheitsorientierter Policies in Südafrika veranschaulicht.

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This contribution aims at a sympathetic critique of Ulrich Brand's *State, context and correspondence* (Brand 2013), where he outlines a historical-materialist policy analysis (in the following abbreviated as HMPA).<sup>1</sup> Brand presents HMPA as an alternative conception to rationalist and interpretive paradigms of policy analysis with close affinities to the latter, most notably to currents of Foucauldian currents of policy analysis. Following an in-depth debate of interpretive policy analysis, Brand highlights common ground as well as differences with his newly proposed paradigm of HMPA. This contribution agrees with Brand's fundamental idea that HMPA can be fruitfully combined with other approaches to policy analysis and intends to further highlight the peculiar features of HMPA.

Brand departs from a dual critique of functionalism in historical materialism and of state-theoretical deficits in interpretive policy analysis. The latter, he claims, fails to consider the context of political processes and therefore fall short of grasping important power relations. Therefore, historical materialism can benefit interpretive analysis to be better able to grasp the context of policy making. His critique of functionalism is geared towards historical-materialist state theory and culminates in a diagnosed lack to further investigate the inner workings of state bureaucracies, which are instead reduced "to their assumed contribution to their function for the stabilization of domination and societal reproduction, and of support for powerful interest groups and their actions" (Brand 2013, 426). This critique is important, as it challenges overtly pessimistic and optimistic accounts on how the state could be used to promote political transformation (Thomas 2011).

Brand therefore constructs the challenge to "conceptualize the *correspondence* of societal and political processes" (p. 426) in order to analyse "the complex and contingent political, socio-economic, socio-cultural, and subjective relations in which people and collectives reproduce themselves materially and symbolically, as well as how the societal division of labour is organized" (p. 431). For this sake he introduces the Poulantzian concept of the state as a "condensation" of power relations (p. 432) and argues for a theory to "translate" context into policies (p. 434). This "translation exercise" finally culminates in the proposal to understand the state as a "knowledge apparatus" attempting to create correspondence of societal and political processes.

This contribution also departs from the historical-materialist understanding of the state as a social relation and therefore agrees with most of the issues raised by Brand. Nevertheless, critique is raised on the understanding of the "condensation" of context into policies: (1) Brand's "translation" (or "condensation")-exercise moves very quickly from the macro-level of the societal context to the micro-level of state bureaucracies. "Condensation" therefore remains a rather opaque concept. (2) While Brand adheres to a historical-materialist perspective, history is only briefly mentioned as an element to foster contingency. (3) While the proposal to analyse the state as a "knowledge apparatus" can grasp some important policy-related processes, it cannot be utilized for other important aspects, such as the use of violence and repression, or the hierarchies between different policy fields.

## 1. Historical-materialist policy analysis and strategic-relational institutionalism

Historical-materialist policy analysis will be proposed to focus on state power as an "institutionally-mediated condensation of the changing balance of political forces" (Jessop 2009a, 380). Based on the above-mentioned three points of criticism, it will first be proposed to consider a broader range of theoretical currents than the interpretive accounts introduced by Brand: (1) A

strategic-relational interpretation of historical institutionalism will be employed to get a better understanding of history and institutions. (2) For a systematic understanding of historically evolving structures, the concept of “periodisation” will be introduced. In addition to the introduction of a broader range of theoretical currents to benefit HMPA, (3) Brand’s proposed concept of “selectivities” will be further refined and specified to be better able to grasp the workings of “condensation”. On these grounds, the dictum of the “knowledge apparatus” will be challenged, which will include critical remarks on theoretically generalizing an idealized “normal state” to be found in industrialized nations. The refined conceptualisation of HMPA will be exemplified by a short stylised example of my own research on equality-oriented policies in South Africa.

## **2. Structure and agency – institutions and discourse**

While Brand emphasises the role of discourse for policy analysis quite extensively, very little attention is given to institutions. As policy is characterized as the “concrete framework for the implementation of institutionalized politics” (Brand 2013, 426), this seems to be rather surprising, even more so, given his Poulantzian understanding of the state as a “material condensation of a relationship of forces” (Poulantzas 2002, 159; transl. BL). As Brand rightly argues, this understanding tries to cope with the relative autonomous dynamics in the policy making process, where policy makers have to face the challenge to deal with structural potentials and limits (Thomas 2011).

While maintaining Brand’s idea that HMPA can provide useful information for a better understanding of the context of policy making to other approaches (including interpretive policy analysis), institutionalist approaches will be introduced as a second interesting strand of policy analysis HMPA can resort to. Early approaches of institutionalist HMPA were presented by Korpi (1983) and Esping-Andersen (1990) for the analysis of social policies and welfare state regimes and the influence of “democratic class struggle” (Korpi 1983) on the institutions. This tradition has afterwards mainly influenced quantitative analyses and typologies of different forms of welfare state regimes but could also be used for qualitative approaches towards policy analysis. Such an approach has been presented by Moulaert and Jessop (2013) and has informed studies by the author of this article (Leubolt 2013; 2014a).

While the German variant of “actor-centred institutionalism” rather avoids questions of power and dominance (Mayntz 2005), other institutionalist approaches tried to focus on such questions. Prominent examples include historical institutionalism with “scholars [who] view institutions first and foremost as the political legacies of concrete historical struggles. Thus, most historical institutionalists embrace a power-political view of institutions that emphasizes their distributional effects” (Mahoney/Thelen 2010, 7). Institutions are thereby conceptualized as going beyond formal organisation to include cultural norms and behaviour. This can help to specify the often rather abstract concept of “structure”, which can instead be conceptualized as historically layered outcomes of a constant social process of structuration (Görg 1994). Thereby, possible new solutions are constrained by path dependencies but new potential for path shaping is also created (Martinelli/Novy 2013).

### 3. Sequencing of history by periodisation

As lined out by Brand (2013, 434–436), the correspondence and/or non-correspondence between societal reproduction and policies is central to his version of HMPA. In this context, he points out history as a contingent and non-linear process, leading to “historically concrete state forms” (Brand 2013, 433). Given its centrality in the concept of historical materialism, it is surprising that the role of history in the policy making process is not further highlighted, even more so in the light of Brand’s (2013, 431) resorting to Marx’s “18<sup>th</sup> Brumaire”. In my point of view, an elaboration of how history is not made “under self-selected circumstances, but under circumstances existing already, given and transmitted from the past” (MEW 8, 115; transl.: UB) can benefit from periodisation (Hirsch 2001; Jessop 2002).

Periodisation has prominently been used by adherents of the regulation approach to describe the structural changes from Fordism to Post-Fordism or neoliberalism from the 1980s onwards (Boyer/Saillard 1995). Other prominent approaches include Braudel’s view on the *longue* and *moyenne durée* (Braudel 1958), World-Systems Theory (Wallerstein 1974–2011.), historical institutionalism (Pierson 2004), and Latin American structuralism (Furtado 1963). Despite important differences, these approaches share a long- to medium-term perspective on history, differentiating between rather long historical periods.

In contrast, other approaches of conjunctural analysis emphasize much shorter periods. In the tradition of historical materialism, this has been mostly done in empirical analysis (most prominently in Marx’s “18<sup>th</sup> Brumaire”, MEW 8; Poulantzas 1974) and less reflected on a theoretical basis (for a notable exception cf. Jessop 2002). The short-term periodisation offered by these analyses tends to focus less on global development than the approaches mentioned above, but instead introduce a more context-sensitive variant of periodisation. Key elements are critical turning points, which mark the transition from one period to the next. The notion of periods is not synonymous with a simple chronology, as it does not imply a unilinear time scale, but instead introduces intersecting and overlapping time horizons with different conjunctural implications for the involved agents (Jessop 2002). Therefore, periodisation is designed to better elaborate on the “context” of policy making, described by Brand (2013, 433) as a result of actions having a “potentially universalizing effect, and which create “corridors” of viable and reasonable action, frameworks and thinking, as well as policy-making”. Periodisation can be used as a technique to grasp the spatial and temporal context specificities of particular policy fields. It will be illustrated at the end of this contribution by the example of South African (in-)equality-oriented policies.

### 4. Selectivities and policy-making

The final point of critique presented here concerns Brand’s focus on the state as a “knowledge apparatus” (Brand 2013, 425). While he also sketches out the role of the state as a “social relation with power-shaped selectivities” (ibid.), this latter role is not much elaborated.

In line with Offe (1972) and Jessop (2007), the concept of selectivities will be given special emphasis in this contribution, as it highlights the differentiated and unequal possibilities of different actors to influence policies. The concept has been initially proposed by Offe (1972, 65ff.) to highlight the class character of the state, which can be asserted only if the class-specific process of priority setting can be further investigated. This could be done by investigating the institu-

tional rules for inclusion and exclusion – a complicated analysis, as analysing exclusion involves a reflection about events which *did not* happen (“Nicht-Ereignisse”; Offe 1972, 74). Even though this thinking is challenging, the consideration of selectivities enables analyses to highlight structural constraints and possibilities for different groups of actors. Using a metaphor proposed by Novy (2001, 27f.), the state could be compared to a soccer field, which is not even, but heavily inclined, with unequally sized goals, so that powerful interest groups find it much easier to score. Taking Novy’s metaphor further, selectivities should not only describe the social aspects within the soccer field, but also the gender selectivities of soccer as a male-dominated sport.

Although Offe originally proposed the concept of selectivities to capture class inequalities in the policy making process, it has later been adapted to additionally deal with gender selectivities (Jessop 2001). Depending on the issue at stake, it might also be interesting to consider other forms of inequalities and discrimination, such as racism or ethnic selectivities, as highlighted in approaches towards an understanding of intersecting forms of inequalities (Klinger et al. 2007; Klinger/Knapp 2008). Differing from Bieler’s contribution in this issue, this contribution highlights the existence of institutionalized discrimination, which cannot be directly linked to class domination, besides being linked to issues of class struggle.

In recent times, Sum and Jessop (2013, 214pp) also dismissed Jessop’s earlier conception of “strategic selectivities” as an all-encompassing concept in favour of a differentiated conception of different forms of strategic selectivities, involving four different modes of selectivities: While (1) structural selectivities concern the contested reproduction of basic social forms, (2) discursive selectivities deal with the contested production of meaning, (3) technological selectivities capture the notion of knowledge in a Foucauldian sense – proposed by Brand as the most promising road to follow, and (4) agential selectivities try to grasp the specific role of certain agents to make a difference or not. With this proposal, Sum and Jessop have re-approximated Offe’s original account, who differentiated between (1) structure, (2) ideology, (3) process, and (4) violence as the four involved modes of selectivities (Offe 1972, 79ff.). Thereby, Sum and Jessop go well beyond Brand’s account, who seems to focus most excessively on the discursive and technological dimensions – e.g. by proposing a concept of “epistemic selectivities” (Brand/Vadrot 2013). This can be seen as a more focused account to reduce complexities in order to be better prepared for empirical analysis. Nevertheless, this contribution will outline a more thorough account of selectivities, which has been employed in the analysis of (in-)equality-related policies in Brazil and South Africa (Leubolt 2014a).

Table 1 outlines the above-mentioned broad notion of selectivities to capture different modes of selectivities in an intersectional understanding of inequalities. Empirical analyses might benefit from focusing on specific selectivities (such as epistemic selectivities, or the idea of a know-

**Table 1: Different modes of selectivities**

	Class	Race/Ethnicity	Gender
Structural			
Discursive			
Technological			
Agential			
Repressive			

ledge apparatus). Nevertheless, a broader notion of the context of policy making might still be beneficial.

The notion of repressive selectivities is absent from both Brand's and Jessop and Sum's account of selectivities. This first comes as a surprise, as both heavily feature Foucault's work, who has dealt with the internalization of repression (Foucault 1977) and both rely on Offe's conception of selectivities, who had clearly mentioned violence as an important mode of selectivities. Tilly (1992) pointed out the interplay of coercion (especially wars) and capital as central in the very process of European state formation. In addition, Gramsci remains an important influence to Brand, Jessop and Sum, having famously defined the state as "political society + civil society, in other words hegemony protected by the amour of coercion" (Gramsci 1971, 263). Nevertheless, the focus of the above mentioned authors seems to be rather on discursive processes than on "the amour of coercion".

If the unevenness of the context for different agents in the policy-making and -implementation process is to be thoroughly understood, the question of violence might make a difference: Feminist scholars (e.g. Walby 2009) have pointed out the role of the state in exercising a monopoly of violence or not, as important for gender relations (e.g. the legal tolerance or non-tolerance of domestic violence). Violence can be imposed by state-, market- and/or civil-society actors and will decisively influence constraints and possibilities of different potential policy makers to tap their potentials. Analysing social policies in Africa, Bevan (2004) came to the conclusion that some countries are marked by vital insecurity due to ongoing civil wars. In such contexts, it is unthinkable to introduce welfare regimes in the short or medium run, but the quest is to transform the current "insecurity regimes". The essential influence of violence might be more visible in "failed states" or authoritarian regimes, than in liberal democracies, but seems to be important in both. It is interlinked with other forms of selectivities, e.g. concerning the discursive struggles whether the use of violence was "legitimate" or not. Nevertheless, the neglect of state theorists such as Brand and Jessop to include the dimension of violence and physical repression seems to be linked to an idealized conception of the liberal state, where "exploitation takes the form of exchange" (Jessop 2009b, 77, citing Moore). This contribution argues for a more explicit consideration of violence in HMPA, for both the predominantly liberal and the more authoritarian forms of states in the Global North and South.

Another important issue to fully grasp selectivities in the process of policy making is the consideration of hierarchies in the state viewed as an institutional ensemble. Policy making in a particular area can easily be sidelined or contradicted by other policy fields, especially (but not exclusively) mediated by fiscal policies. While this issue featured prominently in the news in recent years, it seems to be a rather marginal topic for many policy analysts and state theorists, including Brand (remarkable exceptions are: Hickel 1976; Stützel 2008; Krätke 2009).

## 5. Equality-oriented policies in South Africa

A short stylised example from my research on equality-oriented policies in South Africa shall exemplify the merits of the approach of HMPA presented here (for a more thorough analysis cf. Leubolt 2014a, chapter 5). The focus here will be rather on the context of policy making than on specific policies, such as social policies (cf. Leubolt 2013; 2014b).

After the end of Apartheid in 1994, progressive governments led by the African National Congress did not succeed in substantially lowering inequalities. The country's Gini coefficient

is ranking among the highest in the world and the African population is still predominantly poor, despite the efforts of a comparably progressive government to introduce ambitious affirmative action policies and the de-racialisation of employment and social policies (Leubolt 2014b). Table 2 features a periodisation of the South African context influencing the efforts of the government led by the ANC.

*Table 2: Periodisation of South African Equality-Related Policies since the 1920s*

<b>Socio-economic periodisation</b>	1924–1970s “racial Fordism”		Since 1970s crisis of institutional racism and transformation to (neo-)liberalism			
<b>Political periodisation (medium term)</b>	1948–1994 Apartheid Regime			Since 1994 Post-Apartheid		
<b>Political periodisation (short term)</b>		Early Apartheid (until 1970s)	Late Apartheid (from 1970s)	1994–1998 Rainbow Nation	1998–2008 African Renaissance	Since 2008 New Africanism

Source: own elaboration, based on Leubolt 2014a, chapter 5

A historical analysis of South African equality-oriented policies revealed that racism became the defining social institution to promote equality among the two biggest colonising “white” groups. It was institutionalised a long time before the Apartheid regime took power and fortified a political economy centred on gold and mineral mining. Policies were designed to form a labour market of unskilled Africans working for “white” companies. Racial unity was constructed in order to prevent conflicts between the main colonising groups, the British and the Dutch. The dominant policies were racist education, employment and social policies to fight the “poor white problem” and especially affirmative action policies for further social uplifting.

Racism began to be culturally, politically and economically dysfunctional in the 1970s. On the one hand it constantly generated more protests nationally and internationally and on the other hand, labour market necessities changed with rising mechanisation. In this context, the social institution of racism was already weakened in the 1970s, when the Apartheid regime began to prepare for a transformation. The crisis of Apartheid in the 1980s and the beginning of the 1990s was marked by a deliberate strategy of the regime to increase violence by state and non-state actors. Casualties among the protesters were alarmingly growing as a result of the strategy inspired by Samuel Huntington, who proposed to initiate the reforms “from a position of strength” (Louw 2004, 90–91).

When negotiations about a democratic transition began, the freedom fighters had limited possibilities: At this critical turning point, they were constrained by limited know-how, international transformations with the fall of the “Eastern Bloc” and the death toll. The result was, that the first Post-Apartheid period of “rainbow nation” was marked by a strive for social peace and reconciliation and little transformation of economic policies or the regime of private property (Marais 2011). First attempts towards social transformation besides the abandoning of institutional racism mainly concerned the public sector. Similar to the politics of the Apartheid regime, an affirmative action programme should benefit the formerly disadvantaged parts of the population. Ambitions to expand social policies failed, as the “tight” fiscal policies imposed a serious constraint (Padayachee 2006), crucially limiting the possibilities of engaged policy makers.

South African equality-oriented policies were thus marked by path dependencies, despite the intended structural rupture. Selectivities were impacted by the international discourse of “no alternatives to liberal capitalism”, linked to a reliance on economic growth to prevent a deepening of the economic crisis in the short and medium run as a structural selectivity. The Apartheid education system led to rather low skill levels of Africans who have been ill-prepared to administer the public administration, resulting in serious agential selectivities for policy formulation and execution. The centrality of affirmative action policies resulted in the rise of a small minority of African beneficiaries, while the vast majority of the formerly disadvantaged was not able to catch up. The failure to link anti-racist to other equality-oriented policies concerning class discrimination has not only been linked to hierarchies within the institutional ensemble of policy making, but also to technical selectivities, as there are hardly any concepts of more coherent policies available.

The hesitant stance towards more radical and transformative equality-oriented policies was also decisively influenced by the repressive selectivities created by the regime’s resort to violence during the process of democratic transformation. During the critical turning point of political transformation, the freedom movement was much more than just another victim of World Bank propaganda (cf. e.g. Bond 2003) and resulting epistemic selectivities, but also seriously constrained by the fatal effects of violence on their constituencies (Marais 2001). Therefore, the crucial period of establishing equality-oriented policies focused strongly on social peace and reconciliation, envisioning a so-called “rainbow nation”. By the end of the 1990s, popular pressure resulted in a radicalisation of political discourse on the need to fight inequalities. The following period of “African Renaissance” was then marked by a radicalisation of the historical pattern of focusing on affirmative action policies: The private business sector has been obliged to include increasing numbers of formerly disadvantaged people up to the highest management level. This promoted a small rising African bourgeoisie while not benefitting the majority which remained poor. These disappointing results generated another discursive turn towards idealised notions of the radical struggle against Apartheid (“New Africanism”) without presenting adequate institutional solutions or policies, which are still influenced by the above mentioned selectivities.

## 6. Conclusion

This contribution aimed at a sympathetic critique of Brand’s contribution towards HMPA. It welcomed Brand’s advance to propose a historical-materialist strand of policy analysis, but argued for a more thorough conception of HMPA. The three points of critique were (1) a neglect to deal with institutions, which might be overcome by entering in dialogue with some strands of institutionalism, (2) a superficial dealing with the role of history, which might be challenged by considering approaches towards periodisation, and (3) a discursive fallacy, overstressing the role of discourse while neglecting hierarchies within the state as an institutional ensemble and different forms of selectivities, especially repression and violence. To overcome the third problem, a nuanced version of selectivities has been proposed to deal with both the intersectionality of unequal social relations and the different modes of inclusion and exclusion, creating a very unequal context for policy making and its implementation. This context was further explained by a brief presentation of the author’s research on equality-related policies in South Africa.

The proposed notions involve a considerable amount of complexity if they are to be considered for empirical analyses. Therefore, they are to be seen as general theoretical guidelines,

which will have to be adapted for the sake of operationalising context-sensitive concrete policy analyses.

## NOTE

- 1 This contribution is mostly based on arguments fully developed in Leubolt 2014a. The author would like to thank Andreas Novy, Christoph Scherrer, Joachim Becker, Oliver Prausmüller, Thomas König, and the anonymous reviewer for valuable remarks, while maintaining sole responsibility for the contents of this contribution.

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