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「少子高齢社会の社会経済的格差に関する国際比較研究」

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主任研究者 白波瀬 佐和子 (東京大学)

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研究要旨

本年度の研究成果は、大きく2つに分けられる。昨年度刊行された『変化する社会の不平等』（東京大学出版会）をもとに、日本国外の読者に向けての研究を進めた。その成果は第I部に収められている。第II部は、第I部の研究をさらに発展させて、経済格差の変化の程度、無業者の増大、格差の二極分化、高齢女性の貧困、職業からみた経済格差、子どもがいる世帯の経済格差等について研究を進めた。

まず経済格差の拡大が近年声だかに叫ばれているが、実際どの程度の変化をもって拡大しているといえるのか、プロジビリティ測度を用いて検討を試みた。その結果、1980年代半ば、1990年代半ば、2001年の3時点間では明らかに違いが認められた。若年の経済格差は若年層の無業者の増大とも関連する。若年だけに限らず、無業になることを親子の世代間関係から試みた。親子間で無業になる確率は類似しており、貧困の世代間再生産の危険を訴えた。格差が拡大したといえども社会が一様に拡大しているとは限らない。そこで、ジニ係数の要因分析を試みた。

高齢層は所得格差の程度が大きいことはすでに指摘されている。事実、近年の所得格差の拡大は人口が高齢化したことに伴うと解釈される。そこで、高齢女性、特に一人暮らし女性に着目して貧困率を検討した。わが国における高齢女性の貧困率は改善されてきたが、それでも最も高い貧困リスクを呈するグループである。これまで世帯の中で提供されてきた生活保障を一人暮らしの高齢者にだれが、どう提供していくかは重要な政策課題である。

これまで所得格差を社会学的アプローチから検討する研究は十分ではなかった。そこで、社会階層という観点から職業に着目して経済格差の検討を試みた。その結果、職業も所得や貯蓄と同様に人々の生活意識を規定する重要な要因であり、特に専門・管理職の社会経済的地位の優位性が維持されていることがわかった。少子化との関連で子どもがいる世帯に着目して経済格差を検討した。こどものいる世帯への経済支援がひとつの有効な少子化対策として注目されている。しかし、果たして経済的支援を提供することで、人々の出産行動は変わるのだろうか。事実、高所得層ほど平均的な子ども数は少なく、世帯所得とこども数は逆相関をしている。また、こどものいる世帯、特に未就学児の幼い子のいる世帯で経済格差が拡大している点は見逃せない。日本は国際的にみて決して経済格差が小さい国ではないが、アメリカほどにはいたっていない。日本では、高齢者のいる世帯の格差に比べると子どもがいる世帯の経済格差が小さいが、近年子どもがいる世帯の貧困率が一貫して上昇している。

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A 研究目的

本研究の目的は、少子高齢化に代表されるマクロな人口変動に着目し、社会の配分メカニズムの変化を検討することにある。実際に検討したテーマは、不平等意識、世帯構造、雇用情勢、教育問題、健康問題、年金制度を含む社会保障制度、職業と経済格差、無業問題、ジニ係数変化の程度、高齢者一人暮らし、子どもがいる世帯の経済格差、である。

B 研究方法

主たる研究方法は、実証データを用いた計量的分析手法である。本分析で用いたデータは、ルクセンブルグ所得データ、国際社会調査、国民生活基礎調査である。

（倫理面への配慮）

マイクロデータの個票分析に際しては、個人情報保護に留意し、流出のないように細心の配慮をする。

C 研究結果と考察

巷で騒がれているほど、経済格差の程度はそれほど大きくは変わってなかった。言い換えれば、これまでゼロ、あるいはごく小さいかった格差が急に拡大したという結果は本分析から得られなかった。

しかし、ひとびとの意識は世の中の格差が拡大し、世の中が不平等になったと訴える。階層帰属意識を国際比較の観点からみると、日本の中流意識が特に高かったわけで

はない。他国も全体の階層構造の中位に位置すると回答するものが多い。ただ、日本は本人の親と比べて本人の社会地位が下がったと訴えるものが多かった（白波瀬）。さらに、若年層の階層帰属意識も中・高齢者に比べて低いことが日本の特徴であった。ここでの発見は、1999年データということで日本が経済的に停滞した時期であり、特に若年層の意識が低くなっていたとも解釈できる。それでも若年が特に将来に対して悲観的になっている状況は見逃せない。

無業になることは、親子の間で相関がある（玄田・藤澤）。無業の親の子もまた無業の確率が高い。これはまさに貧困の世代間継承の問題である。世代関係の負の循環問題は、すでに母子家庭の貧困研究からも明らかにされているが、母子家庭のみならず、無業や貧困の世代間移転の問題は今後ますます重要になる。

貧困の世代間継承はまさに階層の固定化をもたらし、社会を二極分解する。事実、複数の格差指標を用いて所得格差を測った結果、豊かなものはますます豊かに、貧しいものはますます貧しくなる社会に向かっていることが警告された（松浦）。マイクロなレベルの負の循環をどう断ち切っていくか。これはまさにマクロな社会政策の対象として対処していかなければならない。

貧困という経済リスクは、高齢期になると高くなる。特に高齢女性の一人暮らしは経済リスクと隣り合わせである（玄田・レベック・藤澤； 白波瀬）。高齢者のほとん

どが子世代と同居していた時期、高齢女性の貧困率は以前7割近くもなるほど高いものであった。その後年金水準も上がり、高齢女性の貧困率が低下してきたが、他よりも経済リスクが高い状況に大きな変化はない。台湾も日本と同様に高齢者の貧困率や経済格差は大きい。台湾に比べると日本の高齢者の状況は改善されているものの、高齢女性の一人暮らしの貧困率は高い（白波瀬）。

貧しいから早死にするのか。これまで健康を格差や不平等の観点から検討するのは一種のタブーでもあった。しかし、健康を格差や階層性から検討するアプローチは欧米ではすでに蓄積があり、人々の疾患率や寿命は学歴や所得と高い相関があることが指摘されてきた。一方、日本については、疾患や自覚症状といったところでは明らかな階層性は見出せなかった。それでも、身体のだるさといった把握しにくいところで、階層差が認められた（石田）。健康だと意識すること、実際に健康であること、さらに健康コンシャスなど、不平等・格差の観点から検討する必要性が指摘された。

実態と意識の間で、ひとびとは揺れ動いている。事実、これまで日本が平等を前面に出してきた義務教育までにも格差が見え始めてきた。これまで徹底した標準化のもと義務教育はかなり高いレベルで平等が確保されてきたとみなされてきた。しかし、実は見えにくい形で不平等が潜んでいたことが指摘される（荻谷）。さらに、機会の平等・不平等についても、これまでは子どもをもつことで、子どもを準本人とみなし、人生の帳尻あわせを次世代に繰り越すことができた。だからこそ、ひとびとは世の中

の不平等や格差に鈍感になれた（佐藤）。

少子高齢化がすすみ、現役世代の負担が高まろうとも、ひとびとは個人勘定を徹底して自己責任を支持とは限らない（宮里）。世代間の助け合い、お互い様の社会的リスクのプールは、実のところ人々の中でそれほど軽んじられていない。

最後に経済格差の意味を探るには、所得レベルだけでは明らかにされないところが多い。所得が高いことで、どのような暮らし方、価値観をもっていくのか。ライフスタイルといった総合的な社会的地位を考慮に入れるには、職業がひとつの有効な変数となる。同じ所得でも職業が異なれば、ライフスタイルや価値観も異なる。本稿では専門・管理職が経済的に恵まれた位置を保持していることが明らかになった（石田）。格差の意味をさらに掘り下げていく上に、所得に加え、資産、職業、そして消費はきわめて重要な分析変数である。

D 結論

本研究で明らかになったことで最も重要なことのひとつは、いまの格差社会を支えるうえに政府の役割が一層重要になり、政府への期待も高いことである。少子高齢化が進む中、人々の生き方が多様になり、世帯の状況も多様になる。その多様な生き方を現行制度は十分に受け止められていない。小さな政府志向が高まる中、不平等の意味、格差の意味を明らかにするために、慎重な実証研究が一層求められている。

E 健康危険情報

なし

F 研究発表

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G 知的所有権の出願・登録状況

1. 特許取得

なし

2. 実用新案登録

なし

3. その他

なし

第 I 部

Inequality in a Changing Society:
Hidden Disparities behind the Demographic Shift
in Japan

Introduction

The Inequalities Hidden in the Low Birthrate/Aging Society

Sawako Shirahase

The Low Birthrate/Aging Society and Inequality

Is the world an unequal sort of place? Of course it is. Everybody is convinced that inequality exists, but there is something vague and hard to define about the content of the concept. People feel inequalities and differentials instinctively, but it is no easy matter to identify the complex mechanisms that generate inequality. That, no doubt, is why exaggerated and simplified accounts of the problem elicit such a powerful reaction. In Japan we have seen a succession of hotly-debated buzzwords, such as *nikyokubunka* (polarization), *kachigumi-makegumi* (winners and losers), and *make'inu no tōboe* (the distant howling of beaten dogs).¹ Since the world is a complicated place, and people do not generally understand the mechanisms that drive it, they respond without hesitation to clear, simple and extreme catchphrases. “What’s wrong with fewer births?!” “The losers will be the ruin of Japan!” – such slogans grab hold of the psyches of the people who hear them, appealing to with their long-accumulated frustrations.

The high economic growth of the 1960s gave birth to the myth of the all-middle-class society, or “society of 100 million middle-class people” (*ichi-oku sōchūryū shakai*), to quote an older catchphrase, and much was made of Japan’s supposedly classless society. Then at the start of the 1990s the bubble economy popped, plunging Japan into chronic recession. The sense of inequality that had been gradually welling up in people’s breasts started to find expression. It is no coincidence that Tachibanaki Toshiaki’s *Nihon no Keizai Kakusa* (Japan’s Economic Differentials; 1998) and Satō Toshiki’s *Fubyōdō Shakai Nihon* (Japan as an Unequal Society, 2000) both became bestsellers within a couple of years of each other. The so-called ‘invisible differentials’ (*mienai kakusa*) had become visible. Parents had got used to planning their

¹ The title of a controversial book by Sakai Junko (Sakai 2003), describing women who had reached middle age without getting married or having children as ‘beaten dogs’ (*make'inu*).

lives on the assumption that their children would lead wealthier lives than they did. As people lost the conviction that they could rejoice in each generation enjoying a higher standard of living than the one before, they started to feel trapped, and as they looked around the various walks of life and saw second- [or third-]generation leaders at the top of so many of them, they keenly sensed the rigidity of social structure. The unfairness that they had not noticed before, or considered to be somebody else's problem, was actually right there. Today we live in times when people are keenly aware of the unfairness and unreasonableness of life as something that directly affects them. But these are also times when the structure of Japan's population is undergoing massive change. We need to ask ourselves whether the mechanisms of socioeconomic differentials and inequality are changing similarly. This is the big question taken up by this book.

One of the first scholars to notice that the aging of society that had set in during the 1980s was tending to widen income differentials was Ōtake (1994). Satō (2000) pointed out the limits of social mobility toward the higher white-collar stratum, arguing that Japan had started moving towards a more status-differentiated society from the 1990s. Kariya (2001) saw declining academic achievement as a worsening problem that was serving to widen differentials in academic achievement among people born into different status groups. The recent decline in academic achievement among children is indeed closely related to status differentials. Somewhat in contrast, Seiyama (2003) emphasized "stratification as narrative," arguing that status in itself had always been there [but was now being accorded far more attention]. His work cast considerable doubt on the argument recently made by other scholars to the effect that status differentials are widening, that status reproduction is strengthening, and that the structure of social status is becoming more rigid. Ishida (2000, 2002) analyzed trends in intergenerational status mobility, focusing on the relationship between birth status and achieved status and taking marginal distribution into account. He concluded that no consistent trend could be identified in [socioeconomic] differentials since the end of the high economic growth era that might speak to a significant change in the degree of openness and equality of Japanese society, either in a positive or negative direction. Likewise Matsuura (2002) calculated differentials not only in income but also in consumption and assets, and found no great change in the degree of inequality during

the 1990s.

Since the dawn of the 21st century, the debate on inequality has become even more intense. But has Japan really changed that drastically? Has some new kind of inequality emerged that was not there before, turning Japan into a much more unequal place? A look at the hard data does not show a clear trend toward inequality (Ishida 2000, Seiyama 2003, Shirahase 2005). Why is it, then, that people nonetheless nod in assent when told of the dramatic worsening of inequality in Japan, and insist on dividing society into bunches of winners and losers? Is the world really susceptible to such simple analysis?

Despite the popularity of extreme language and the loud arguments, often with names of star debaters attached to them, the world is not, in fact, such a simple place. It is a vague and opaque sort of place. Behind people's willingness to believe all the talk about winners and losers, [of the rich getting richer and the poor getting poorer,] there lies a more complex, unclear world. Amid all the arguments about inequality running along on parallel lines, what this book sets out to do is to undertake an honest, direct search of the many little-understood mechanisms that make the world work the way it does.

Opaqueness amid clear change

The phenomenon of 'the low birth rate coupled with an aging society' (*shōshi-kōreika* in Japanese) may broadly be read as an amalgam of four different demographic factors:

- (1) The trend among young people to postpone marriage (*bankonka*) or not get married at all (*mikonka*).
- (2) An increase in the number of couple deciding not to have children [, or to have just one child].
- (3) An increase in the proportion of people aged over 65 in the overall population
- (4) Increased longevity, as seen in the increasing number of people in the late old-age bracket.

Now these demographic changes are not just abstract numbers. They bring with them qualitative change in the relations between the people who make up society, and to the various systems [governing that society]. Yet although these changes are clear and undeniable, and are inexorably transforming Japanese society, the content of those changes remains unclear and indefinable. The aging society is definitely on its way, yet despite all the talk about it, its implications are surprisingly poorly understood. Confronted with our own very near future, we still do not know what it is going to be like. Confronted by evident change, people become extremely anxious, and sometimes overly pessimistic. Yet if they think they are getting excessively pessimistic, they may rush to the opposite extreme and become rashly optimistic. People's feelings swing like a wild pendulum. This unsettled feeling is what makes them especially liable to welcome extreme and over-simplified messages.

This mode of thought, that impulsively jumps to forced conclusions dividing society into black and white, ignoring all the shades of grey between, is ultimately escapist. People feel strangely convinced by extreme words, and end up accepting reality. Why? Because behind the appeal of polarizing arguments lies the ability to evade social problems by seeing them as not directly concerning oneself. Consider the expression 'winners and losers.' [Interestingly, the Japanese term, *kachigumi-makegumi*, literally means 'winning team/gang' and 'losing team/gang,' further emphasizing that these are two distinct groups.] Presented with the concept of these two extreme categories, most real people feel that they do not belong to either of them. [Perversely, however,] the very fact that this kind of polarization theory applies only to a small minority of real people is the very key to its popularity. Since people who read these theories are mostly living somewhere in the grey zone of the far more complex real world, the talk of polarization, of winners and losers, becomes an interesting yarn that does not affect them personally. They accept these interesting tales of other folk and feel better because they think they now have a better understanding of the ways of the world. People react by saying things like: "I kind of feel I understand what he/she's going on about," "but since it doesn't actually relate directly to me, I don't really know what it's all about." And as they say such things, they feel half-reassured.

People have a certain skill [in self-deception] that stops them from flatly rejecting things [/the status quo]. They have little interest in destroying the existing

order in favor of a totally new system. They may be brought up in an underprivileged environment, such that however hard they try, their efforts will never be fairly judged. Even at such times, they do not directly express their anger. Living in an opaque world, they exhibit a strange blend of resignation and compromise that makes them accept the status quo. However, accepting reality and confronting reality are not the same thing. People shirk from the latter, averting their eyes from the task of explaining complicated matters. That evasion makes it easy for them to resign themselves to present realities and even approve of them.

In the complex gradations of the real world, it is very difficult to place oneself somewhere between zero and a hundred. Dividing people into two types, in gangs of winners and losers, or even into four groups according to blood-group, , means unconditionally accepting a world in which, truth to tell, there may be *no* place where one really fits in,.

The first key feature of Japanese demographic change that we have to acknowledge is its speed. Because change is fast, people experience mood swings, becoming excessively pessimistic or excessively optimistic. When seeking to design the society of the future, which changes should we factor in? Because change is so fast, we do not have the time for careful deliberation over questions like that, and so we try to think on our feet, throwing off ambitious plans for the future while struggling to keep up with the present. Because we are running alongside change, it can be difficult for us to figure out where change is happening and where it is not. In this book, therefore, what we want to do is start from the clear and undeniable quantitative change embodied in the falling birthrate and aging population, and try and see how those quantitative changes relate to qualitative change in Japanese society, starting with a look at structures of inequality in terms of the distributive principle within society.

Differentials and Inequality

Inoki (2003) asks the question of why and how income differentials become problematic. If differentials existed only in reality, they would not be treated as a social problem and debated so heatedly by economists and sociologists. However, if income differentials are indeed a problem, that is because they are accompanied by related

forms of consciousness in people's minds – Inoki focuses particularly on “willingness” (*yaruki*). Differentials become a problem not simply because of the gaps in material wealth that they represent, but more because they are mediated through feelings of socioeconomic superiority/inferiority. This superiority/inferiority of which I speak determines not only positions on that continuous curve representing income levels in a population, but also people's social standing, including such notions as prestige and honor, which derives ultimately from level of income. It also determines people's material standard of living. Material standard of living, in turn, determines not only quality of life at any particular point in time, but also people's latent ability to deal with future risks, including those of illness, unemployment, and those associated with old age and childbearing/childrearing. This kind of superiority/inferiority and variation in latent coping ability, derived from quantitative differences, gives birth to a more all-encompassing structure of social inequality. One key to understanding inequality as discussed here is the notion that differentials are *unreasonable*. If one rejects that notion, insisting that [socioeconomic] differentials are simply the outcomes of differences in ability or effort, then those differentials may seem unavoidable or even just. One may deny the very existence of inequality as a social problem, and morally justify differentials. The current tendency in Japan to view differentials not just as gaps in income but as inequality in a broader, more political sense, reflects the existence of a degree of unreasonableness that cannot be explained away by reference to individual responsibility.

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Chapter 1
An Explosion of Inequality Consciousness
Changes in Post-war Society and ‘Equalization’ Strategy

Satō Toshiki

1. What ‘Widening Inequality’ Really Means

We are all too prone to forget the basic fact that society is something that lives in the fourth dimension: time. The same goes for social change.

We tend to find it easy to envision social change in terms of milestones and turning points. To take a familiar example, if you talk to students around twenty years old, you will often hear them say that they ‘can’t understand the youth of today,’ or that ‘junior high school kids have totally changed since I graduated from junior high myself.’ Interestingly, the lines themselves have not changed at all. Twenty-year-old students have been talking that way at least since I was one of them myself – which was about twenty years ago.

That is not to say that in reality nothing has changed at all. No doubt both children in general and junior high-school kids in particular have changed. The point is that we tend to find it easier to notice change at a particular point in time, such as the moment we finished junior high school and thereby completed our compulsory education. Change is easier to grasp in terms of milestones, or to take the argument a step further, talking about those milestones makes it easier for people to perceive change. We have that habit, we have that mechanism.

‘Widening inequality,’ the topic of this book, is another case in point.

Around the end of the 1990s, widening social inequality, or *fubyōdōka* (literally, ‘unequalization’), became a hot topic in Japan. In discussing this phenomenon, I want to first make it clear that the notion that ‘society is becoming more unequal’ is not quite the same kind of notion as ‘junior high school kids have changed.’ The latter has been a popular stereotype for decades, but the former is far more recent. It is only in the last ten years or so that *fubyōdōka* has become a buzz word. Before that, most people tended to

think that Japanese society was marked by relative equality.

This fact may serve as a hint to us that ‘unequalization’ is a particularly time-specific notion – not that I am denying the possibility that the notion of the youth of today having changed may not itself change with time. However, it is overly simplistic to see unequalization as a sudden drastic change at a particular point in time. Society is not like that. It has the power to resist change and remain consistent. It takes time to change society at its roots. Sometimes change can only be measured over a period of decades – such as changes in occupational continuity from one generation to the next, where the basic unit of time is the age difference between parents and children.

‘Unequalization’ is closely bound up with changes like this. It is a compound of many different changes, some of them mid-term changes occurring over several decades, some of them short-term changes taking a single decade or so, and some of them almost instantaneous – by which I mean taking just a few years. The best way to view unequalization is as a gigantic complex of all the above, appearing on the outside as a single mighty transformation.

2. How the Explosion of Inequality Consciousness Happened

I would argue, then, that what we witnessed in Japan from the late 1990s was not so much an explosion of inequality as an explosion of inequality consciousness.

I do not mean by this that widening inequality was all in the mind. Indeed, society is constructed of people’s thoughts and feelings, so that even if widening inequality really *was* all in the mind, it would still be a significant social change. If the general public really did get the impression of widening social inequality with no grounding whatsoever in economic reality, that would indicate that the government had done something to lose the trust of the people – a truly disastrous policy failure, itself deserving of criticism.

People’s feelings do not faithfully reflect reality. The ongoing debate on income differentials and trends in intergenerational occupational mobility has shown that if we limit ourselves to reality as measured by statistical data, any change that may

have occurred has been marginal enough for some observers to dispute whether it has happened at all. When people speak from their feelings, however, they speak as if change is an established fact, visible to all.

Whether or not this sea-change in feelings has any direct relation to statistical data, it surely has responded to *something* in the real world. I use this expression, ‘an explosion of inequality consciousness,’ to describe the complex of realities and feelings that has developed around the concept of inequality.

As I read the situation at present, the explosion of inequality-consciousness is the product of three kinds of change:

- a) Mid-term change measured in units of several decades: the disappearance of the post-war social mechanism.
- b) Short-term change measured in units of decades: the recession induced by the bursting of the bubble economy and changes in employment practices caused by globalization.
- c) Policy failures: government policies that have had the effect of exacerbating anxieties and distrust regarding widening inequality.

There has already been a considerable amount of research done on item (b), and chapters 3 and 6 of the present volume also address it. Item (c) is also discussed in other chapters, and I will have more to say about it myself, but for now let me simply observe that as I see it items (a) and (b) created an underlying sentiment that was highly sensitive to inequality, and that despite that, or possibly even because of that, the Japanese government pursued policies that could have been designed to inflame that sensitivity.

Let me put it in more concrete terms. At a time when people were already becoming increasingly sensitive to inequality of opportunity, the government applied policies in various fields, including economic management, taxation and education, which ignored opportunity inequality or even denied its existence. While the general public grew ever more sensitive to the issue, the government became ever more insensitive. The net result

was an explosive increase in consciousness of inequality.

The enforcement of government policy has a particular date; that is to say we can put a date on its impact. That impact was the final trigger that launched the explosion of inequality consciousness. It turned inequality into an ‘turning point’: despite its close relationship with items (a) and (b), both of them phenomena stretching over a lengthy time-span, inequality came to be seen by people as a sudden, dramatic change.

Needless to say, this is just a hypothesis. It will need to be verified by empirical study in the years to come. But if my hypothesis is even partially correct, it means that widening inequality is a product of several different (albeit related) kinds of change. It follows that a combination of different policies will be needed to form a response to the problem. The phenomenon we call ‘widening inequality’ was not the outcome of a single cause, and it follows that there is no single silver bullet that will put everything to rights. It will require not only policy-making developed over several years, but also determined monitoring over several decades and a response at the level of the fundamental mechanism of society as a whole.

3. Another Phenomenon: The Erasure of Inequality Consciousness

Of the three factors I mentioned above as causing the widening inequality phenomenon, items (b) and (c) will be dealt with in earnest in other chapters, so I would like to take a closer look at item (a) here.

Broadly speaking, item (b) concerns economic mechanisms, while item (a) concerns social mechanisms. Of course the economy and society cannot be separated as neatly as the academic division between economics and sociology might suggest: they are locked in deep interplay. Nonetheless, I do think it makes sense to retain that rough and ready distinction when discussing inequality. The very fact that the two are so closely related in the real world makes it worth separating them as a first-order approximation.

The disappearance of the post-war social mechanism, which I have labeled factor (a), has in turn a number of aspects. For instance, long-term change can in itself