

## Week 1:

### Comparative social policy analysis

- Identifying similarities & differences across regions, countries, localities, cities with regard to inputs, processes, outputs, outcomes, social structure and normative/ideological positions
- Explaining these similarities & differences
- Developing theoretical schemes to enable explanations to be tested or applied to other countries, situations/or policy areas.

### Typologies as a way to compare

- Typologies and models enable us to identify key similarities and differences –
- They provide a way to simplify complicated institutions and processes without being swamped by detail
- They provide a way to ensure that we are comparing 'like with like'
- They can 'fix' our idea of reality, so that we then do not pay attention to 'real world' details, and political, social and policy change.
- Titmuss' (1958) typology of welfare states
  - The structure of his typology: USA as 'residual'; Germany as 'industrial achievement'; Sweden as 'institutional-redistributive' welfare states
  - Problems with Titmuss: is there a scale of welfare states? What does it explain? Is the welfare state only social security?

### Welfare regimes as an analytical device: Esping Andersen

- Esping-Andersen's (1990) work changed comparative social policy. From simple causal, large-scale analyses vs small scale complex analyses, to a framework which combines the two. I like the term 'configurational' to describe this approach; E-A refers to it as 'interactive' (1990: 32-3)
- He applied a conceptual framework to compare welfare systems and explain their development, both in terms of their similarities and their differences
  - *Decommodification*: ability of a worker to survive outside the labour market
  - *Stratification*: extent to which occupation/class status in market place is produced or reproduced by the welfare state
  - *Market and state*: the balance – or tension – in the provision of welfare by each
  - *Welfare systems*: institutional arrangements for the provision of welfare; entitlement conditions; types of benefit; levels and coverage of benefit
  - *Welfare regimes*: political economy of welfare; power and conflict in the development of welfare systems

*The welfare state is not just a mechanism that intervenes in, and possibly corrects, the structure of inequality; it is, in its own right, a system of stratification. It is an active force in the ordering of social relations.*

(Esping Anderson 1990: 23, emphasis EC)

### E-A's 3 worlds

#### *Welfare regime*

##### Liberal

weak unions, no Christian Democracy  
weak Social Democracy,

##### Corporatist

strong Christian Democracy &  
Social Catholicism

##### Social democratic

corporatism?; strong unions

#### *Welfare system*

##### residual

bad risks; individualized risk; market  
oriented; needs based

##### conservative

status maintenance; familialism; occupational  
based

##### universal

socialization of risk; egalitarianism; rights  
based

### E-A's welfare regimes: critiques of conceptualisation & methodology

- Narrow focus; gender (see O'Connor, Orloff & Shaver 1999)
  - commodification prior to decommodification
  - commodification as emancipation
  - defamilisation as 1<sup>st</sup> step
- 'decommodification' measurement biased toward short-term, male unemployment.. Most commentaries since do not examine stratification in as much detail

### Alternative regimes & typologies: critiques of analysis

- 'Latin rim' (Leibfried)
- 'Southern Europe' (Ferrera, e.g. 1998)
- 'Families of nations' (Castles 1993)
- 'Breadwinner' (Lewis 1997)
- 'Parent worker/parent caregiver' (see discussion re: Lewis 1997)
- Bismarckian/Beveridgian (Bonoli 1997) – see also van Keesbergen (1995) on social Catholicism and 'Bismarckian' states.

### Summary

- The idea of typologies is not new, but E-A (1990) brought together the concerns and explanations of welfare state origins, development and trajectories in a new synthesis
- Typologies and models are nearly always susceptible to 3 criticisms: narrow focus; arbitrariness & lack of dynamics
- E-A (1990) identified 3 'worlds of welfare capitalism': liberal, corporatist, and social democratic
- His model has been critiqued on grounds of its narrow focus of its conceptualisation, which can be seen as normative; the narrow focus of its application; and following on from these, for its methodology
- His work stimulated a range of alternative models/typologies, some of which are more convincing than others. The most important are associated with concerns about gender, & about the organisation of different countries within each regime.