

Worlds of Welfare

1. Epistemological Questions

- Why compare between countries?
 - Cross-country comparison as a social science research method: to construct & test theories, control macro-social environments, compare social outcomes in varying contexts
 - Policy learning between countries (New Labour and liberal welfare states; COVID-19 job retention schemes across Europe)
 - Predict future development & change (of welfare states)
- Is typologizing necessary?
 - Reducing complexity & diversity of each case for analytical parsimony
 - Differences between policy domains (i.e., UK is 'liberal' despite its universal free health care and education)
 - Within-regime variations, no pure cases (i.e., Netherlands – mix of social democracy & conservatism), and between-regime similarities

2. Esping-Andersen's Three Worlds of Welfare

- 'Three worlds' (Esping-Andersen, 1990, 1999) based on social rights

	Liberal	Conservative/ Corporatist	Social Democratic
Ideal type	USA, UK	Germany	Sweden
Entitlement structure	Means-tested Poverty relief (minimum)	Social insurance, earnings-related	Universalism (social citizenship)
De-commodification	Low	Mid-low (depending on contributions)	High
Social Stratification	Dualism	Divided by class (& gender)	Egalitarian, solidarity
De-familisation	Market services	Low	Social Services

- Why have countries gone through different paths (historical explanation)?
 - Crude answer: how strong middle class joins to support the welfare state & how strong pro-welfare coalition is formulated (Politics matters)

- Nature of class mobilisation: whether unions pursue social solidarity as opposed to their own interest? (Revision of power resource theory)
- Patterns of political coalition building: Red-Green (worker-farmer) alliance in Scandinavia vs Christian Democratic–Social Democratic alliance in continental Europe
- Historical legacy of institutionalisation: middle-class preference (market vs universal social service vs social insurance)

3. Feminist Critique (see Lewis, 1992; Orloff, 1996; Sainsbury, 2009)

- De-commodification of WS reproduces gender inequality/division of labour
 - 'Family wage', survivors' pension, assistance for dependent families
- Role of male-breadwinner ideology embedded in policies (Lewis, 1992)
 - Welfare state punishes women's labour market participation
- Gender-blindness of Esping-Andersen (1990): assuming male production workers' perspective; main focus on state-market nexus & class relations
 - Policy domains: pensions, unemployment benefits, sickness pay
 - Gender differences within class & state-family relations ignored
 - Role of women's unpaid (care) work in welfare productions neglected
 - Women need to be commodified (for emancipation, autonomy) → de-commodification not a suitable concept for women's welfare
- Defamilialization: the degree to which women are from family obligations through social care; independence of social rights from family relationship
 - Expansion of welfare state regimes: integrating analysis of gendered relations and paid/unpaid care arrangements
 - Tension between gender-neutral vs gender-blind: women are at higher poverty risks (i.e., single mothers) & disadvantaged in labour markets
- Contributions of gender analysis to understanding welfare state changes
 - Raising the role of ideas, discourses & culture (Orloff & Palier, 2009)
 - Bringing 'new ideas' of welfare state research: female employment, children's outcome & social investment, women in politics
 - highlighting the significance of care work in the production of welfare

- Linking family with market-state nexus of welfare provision
- Impact on real-world policymaking: social services, childcare & long-term care, activating women, individualised tax-benefit system
- From reproducing unequal gender relations to tackling in welfare states
- Note that Bambra (2004) illuminates that factoring in gender dimension (defamilisation) does not significantly change the 'three-worlds' typology
 - This does NOT mean that feminist critique is invalid: it rather indicates that different ways of *understanding welfare state variations* do not change the outcome of regime classification.

4. Other criticisms against the Three Worlds Typology

- Does it really have to be three worlds?
 - Mediterranean: underdeveloped state welfare, lack of articulated social minimum, but similar family structures to conservative regimes
 - Antipodes: minimum-wage driven (pre-distribution), high coverage of means-tested benefits
 - East Asian: Japan was included (only high-income country in Asia by 1990), does it look strange to fit Japan into the corporatist group with continental European welfare states?
- What other dimensions should be considered to construct the theory?
 - Policy dimensions: only pension systems, unemployment benefits, sickness pay considered in Esping-Andersen (1990), later defamilization added (Esping-Andersen, 1999)
 - But what about health? Social services? Education? Conditional cash & tax benefits?
 - Pre-distribution? Antipodes → low market wage inequality ("minimum-wage welfare states")
 - Other dimensions of WS: role of religion (Christian-democratic: Van Kersbergen, 1994), voluntary sector, gender, race/immigration...