

A HANDBOOK OF COMPARATIVE SOCIAL  
POLICY



# A Handbook of Comparative Social Policy

*Edited by*

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# Contents

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<i>List of figures</i>	vii
<i>List of tables</i>	viii
<i>List of contributors</i>	ix
<i>Acknowledgements</i>	xvi
Introduction: the changing context of comparative social policy <i>Patricia Kennett</i>	1
PART I THE STATE AND SOCIAL POLICY IN A GLOBALIZING WORLD	
1 Hollowing out the 'nation-state' and multi-level governance <i>Bob Jessop</i>	11
2 Globalization, the state and welfare: gendering the debate <i>Jill Steans</i>	26
3 Globalization, human security and social policy: North and South <i>Andrés Pérez-Baltodano</i>	50
4 Social protection by other means: can it survive globalization? <i>Ramesh Mishra</i>	68
PART II CONCEPTS AND DEFINITIONS	
5 Defining comparative social policy <i>Jochen Clasen</i>	91
6 Conceptualizing state and society <i>Graham Crow</i>	103
7 The ethnocentric construction of the welfare state <i>Alan Walker and Chack-kie Wong</i>	116
8 The paradox of care: a Chinese Confucian perspective on long- term care <i>Julia Tao</i>	131

PART III COMPARING AND CATEGORIZING SOCIAL POLICY,  
PROVISION AND REDISTRIBUTION

- 9 Robin Hood, St Matthew, or simple egalitarianism? Strategies of  
equality in welfare states 153  
*Walter Korpi and Joakim Palme*
- 10 Gender, citizenship and welfare state regimes 180  
*Julia S. O'Connor*
- 11 Structured diversity: a framework for critically comparing  
welfare states? 201  
*Norman Ginsburg*
- 12 Social development and social welfare: implications for social  
policy 217  
*James Midgley*
- 13 Social policy regimes in the developing world 239  
*Ian Gough*

PART IV THE RESEARCH PROCESS

- 14 Crossing cultural boundaries 261  
*Linda Hantrais*
- 15 Living with imperfect comparisons 276  
*Else Øyen*
- 16 Constructing categories and data collection 292  
*Patricia Kennett*
- 17 'Fit for purpose?' Qualitative methods in comparative social policy 307  
*Steen Mangen*
- 18 The quantitative method in comparative research 324  
*Mattei Dogan*

PART V THEMES AND ISSUES

- 19 The international and comparative analysis of social exclusion:  
European perspectives 341  
*Graham Room*
- 20 Shelter, housing and inequality 355  
*Ray Forrest*
- 21 Globalization and crime 373  
*David Nelken*
- 22 Informational society, e-governance and the policy process 388  
*Ian Holliday*
- Index* 405

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## Figures

---

9.1	Ideal-typical models of social insurance institutions	159
9.2	Redistributive budget size and income redistribution in 11 OECD countries	167
9.3	Index of targeting of public pensions and inequality in gross income (Gini) among the elderly in nine countries	170
16.1	Local authority homeless acceptances in Great Britain	301
16.2	Reasons for homelessness in England	302

---

## Tables

---

9.1	Ideal-typical models of social insurance institutions	158
9.2	Inequality (Gini) and poverty rates in disposable income in 11 OECD countries <i>c.</i> 1985 in different population categories by type of social insurance institutions	165
13.1	The three worlds of welfare capitalism	242
13.2	Components of the institutional responsibility matrix	246
13.3	Ideal-type welfare and informal security regimes compared	248
16.1	Estimates of number of persons homeless in Europe	298

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### Note

1. CROP is an interdisciplinary and international research programme on poverty in developed and developing countries. CROP now has a network of more than 1700 researchers and institutions working with poverty issues. For more information you may visit the web at [www.crop.org](http://www.crop.org).

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# Introduction: the changing context of comparative social policy

*Patricia Kennett*

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The field of comparative social enquiry has grown dramatically since the 1960s, in terms of the amount of studies being undertaken, the range of approaches used and the countries analysed. The analytical emphasis on the notions of modernization and convergence, and social expenditure as a proportion of GNP as the measure of welfare effort, whilst still evident in contemporary cross-national research, ceased to dominate the comparative landscape during the 1980s. There is now much more interest in recognizing and explaining qualitative as well as quantitative differences in types of welfare systems, an acknowledgement that formal social policies are only one element in the arrangement of welfare and that social policy is not just about ameliorating the impact of social inequality or altruism but itself contributes to social divisions in society. There has been a greater recognition of diversity and the importance of analysing context, processes and the outcomes of social policies in different countries and their impact on different groups.

The changing discourse around social policy and the welfare state can also be associated with the economic and political conditions of the 1980s, which were in marked contrast to what had gone before. In many OECD countries post-1945 was an era in which the notion of Keynesian welfare capitalism, in its various institutional forms, incorporated a commitment to extended social citizenship and a certain minimum standard of life and security as a matter of right. National welfare regimes helped to underpin a global system of interacting national economies characterized by mass production and mass consumption. This model of institutionalized, bureaucratic provision and social rights was perceived as the inevitable outcome of a 'modern' or developed society. By the 1980s it was the political rhetoric of deregulation, privatization, the efficiency of the 'free market' and rolling back the frontiers of the state that had become the global economic discourse influencing both national and international policies. According to Taylor-Gooby (2001) in a European context '... Keynesianism (the view that state intervention is the best way to promote growth and employment) is quite simply dead, a result of the general acceptance that governmental capacity to manage investment within its borders is limited' (p. 19). At the same time many of the fundamen-

## 2 *A handbook of comparative social policy*

tal assumptions associated with the national welfare state and the social rights of citizenship have been discredited and renegotiated, and the discourse about the role of the state in welfare has moved in a new direction (Taylor-Gooby, 2001; Kennett, 2001). Harris (2002) contrasts the 'new' welfare of the last two decades which centres on personal and community relationships (Etzioni, 1995, 1997; Driver and Martell, 1997), community governance and the notion of active membership, with the 'old' welfare of the post-war period with emphasized society, universal citizenship rights and statutory state provision (King and Wickham Jones, 1999; Rose, 1999). Fundamental to the 'new' welfare is a re-balancing of the social contract between the state and the individual, between rights and responsibility and between different spatial scales.

The current context then is one in which many of the old certainties of the past have been eroded, and the predominantly inward-looking, domestic pre-occupation of social policy has made way for a more integrated, international and outward approach to analysis. Central to this endeavour is a reassessment of the place of the state in contemporary social policy analysis. The pre-eminence of the national scale, the national state and the national citizen has been weakened by internationalization, the growth of multi-tiered networks and partnerships, and the re-emergence of the regional and the local within national states. There has been a proliferation of scales, channels, projects and social networks through which social interaction and active participation can be pursued. Thus, within the modern world system the notion of unfettered state sovereignty has become problematic and contradictory (Clapham, 2002; Weiss, 2003) and has presented new challenges for comparative analysis in the social sciences.

These challenges have been captured in recent academic debates relating to processes of globalization which have contributed to a de-centring of the state in social policy analysis. The burgeoning literature reflects the multifaceted nature of global processes, and indeed the vagueness and inconsistencies in the use of the concept (Geshiere and Meyer, 1998). General debates have been concerned with the economic, cultural, technological, social and political dimensions of the phenomenon. More recently, the relationship between globalization, social policy and the welfare state has generated interest amongst commentators (for example Deacon et al., 1997; Midgley, 1997; Mishra, 1999; Yeates, 2000; Scharf, 2000; Swank, 2002). This interest has emerged in the context of the retrenchment and reorientation of welfare mentioned earlier and the changing role of the state as its dominant position has increasingly been challenged by transnational institutions and the assertiveness of subnational governments. Global processes are said by some to have contributed to the erosion of the functions of nation-states and deprived national governments of their ability to establish and maintain an auto-

mous welfare model. Clearly there are differing opinions on the nature, extent and impact of global processes on social policy and welfare systems. What is more certain is that the current context of social policy is one which looks beyond the boundaries of the state in terms of incorporating transnational and subnational activities, and which is sensitive to the nature of the mixed economy of welfare and the range of conduits through which policies are made and delivered. For Gershieri and Meyer the concept of globalization is inspiring precisely because it requires social scientists to reconsider and reflect upon their objects of study as well as 'seek for more appropriate fields of investigation which take account of peoples actual entanglement in wider processes' (Geshiere and Meyer, 1998: 603).

So in de-centring the state the researcher is encouraged to reconsider established structures of 'boundedness' and to seek out alternative orientation points and identify reconstructed boundaries as individuals, communities and societies seek to make sense of a changing world.

It is in this context then that this handbook brings together the work of key commentators in the field of comparative analysis in order to provide comprehensive, but by no means exhaustive, coverage of contemporary debates and issues in cross-national research. Organized around five themes, the collection explores the contextual, conceptual, analytical and processual aspects of undertaking comparative social research. The first part – 'The state and social policy in a globalizing world' – is concerned with extending the epistemological framework through which cross-national analysis is explored. The four contributors to this part draw on the theme of globalization to explore the future of the nation-state and the nature of governance, and the implications for human security and social protection in different societies and for different groups of people.

Bob Jessop (Chapter 1) identifies the transfer of powers previously located at the national level to a more diverse, multi-level and multi-sector range of actors and institutions. In addition, he stresses the increasing importance of looking 'beyond the state' in order to understand the future of national and/or nation-states and recognize that it is 'embedded in a wider political system, other institutional orders, and the lifeworld' (p. 12 this volume). Whilst pointing out that the boundaries and institutional structures of states are socially constructed and vary over time and across space, Jessop identifies the demise of the Keynesian welfare national state and its replacement by a Schumpeterian workfare post-national regime. Within this regime the emphasis is on innovation, flexibility and open economies, the erosion of the social wage and a subordination of social policy to the needs of a flexible labour market and an economy able to compete in the global market place.

The implications of this and other aspects of recent structural change on women are the concern of Jill Steans (Chapter 2). Her emphasis is on the

#### 4 *A handbook of comparative social policy*

gendered nature of globalization and world order and the significance of the public and private realms in reshaping identities and roles in both developed and developing countries. The differential impact of globalization on the states and societies of the North and the South is also a concern of Andrés Pérez-Baltodano in Chapter 3. He investigates the range of social policy responses to the crisis of security created by processes of globalization. He outlines the formation and development of the democratic western European state and, drawing upon this 'universalist' model, considers the different levels of 'stateness' achieved by countries in the North and the South. He argues that an understanding of the varying capacities of states to respond to global pressures is vital in order to fully comprehend the varying conditions of human security across societies. To this end, his focus on the North and South provides a useful comparison in that they 'represent categories for differentiating levels of institutional and regulatory capacity to create conditions of order and security at the national level' (p. 57 this volume).

In the final chapter of Part I (Chapter 4), Ramesh Mishra focuses on Australia, Japan and the post-socialist countries of Eastern Europe and the former USSR as representative of societies with institutional patterns defined as 'social protection by other means'. He argues that these were developed during an era of relatively closed and insulated national economies and considers the extent to which they have been undermined by the opening up of national markets to international competition.

The reassessment of the role of the state in social policy analysis forms part of a fundamental reappraisal of the assumptions embedded in social science research which has been under way since the 1980s. The rationality, essentialism and universalism of policy discourse and practices through which the welfare state was established have been called into question. The emphasis on diversity, difference and contingency and the notion of spatial and temporal variation challenged many of the assumptions on which the theoretical and epistemological traditions of social policy have been built. With this in mind Parts II and III of this volume focus on the conceptual and theoretical frameworks for analysing social policy cross-nationally.

In Chapter 5 Jochen Clasen begins by exploring the distinctive features of and the meanings applied to comparative social policy over recent years. For comparativists the unit of analysis has traditionally been different national contexts. However, as the boundaries of state and society are becoming increasingly blurred the concerns for Graham Crow in Chapter 6 are 'What do social scientists compare? Are the concepts of state and society still relevant in cross-national analysis?'

Chapters 7 and 8 question the dominance of the Western social research paradigm in comparative analysis. Alan Walker and Chack-kie Wong critically assess the way in which the concept of the 'welfare state' has been