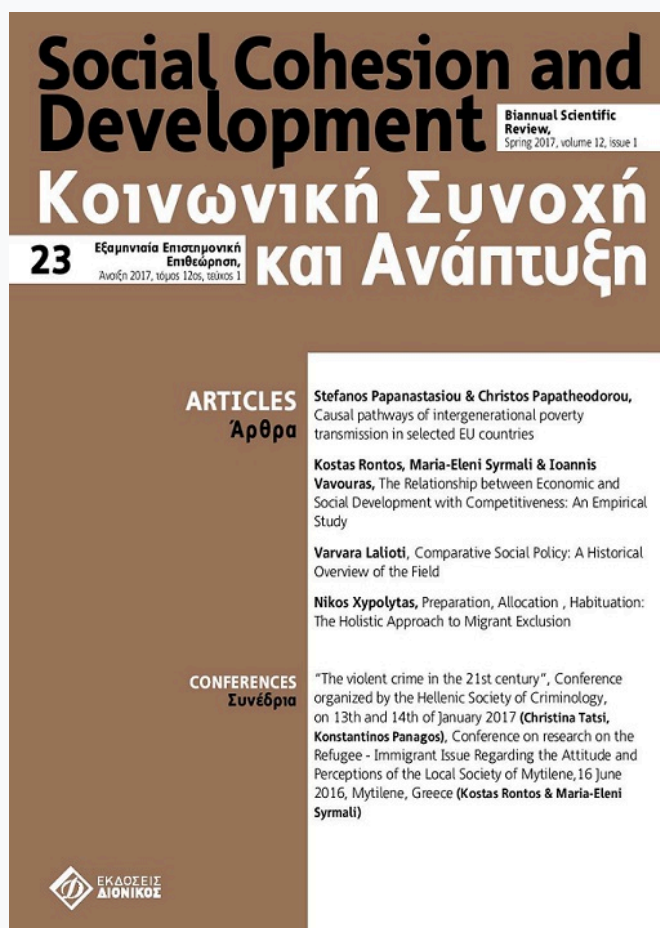


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### Comparative Social Policy: A Historical Overview of the Field

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## Comparative Social Policy: A Historical Overview of the Field

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### Συγκριτική Κοινωνική Πολιτική: Μια ιστορική επισκόπηση του τομέα

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#### ABSTRACT

This article aims to provide a succinct historical overview of comparative social policy. Typified by both challenges and benefits, comparative social policy started to experience a period of growth in the 1960s, a time characterized by the dominance of the so-called Keynesian welfare state. It will be argued that the publication of Esping-Andersen's *Three Worlds of Welfare Capitalism* in 1990, during a period marked by the omnipotence of the so-called Schumpeterian welfare state, coincides with the beginning of a new era for comparative social policy, one that has resulted in it being recognized as a separate field of study. The article discusses the main characteristics of each evolutionary phase of comparative social policy, as exemplified by the preponderance of descriptive studies and the functionalist family of welfare state explanations in the pre-1990 years and the dominance of the welfare state taxonomies in the post-1990 period. In spite of the challenges that are yet to be overcome, the proliferation of studies in the field transmits positive messages about the future of comparative social policy.

**KEY WORDS:** Comparative social policy, historical overview, welfare regime theory.

#### ΠΕΡΙΛΗΨΗ

Στόχος του παρόντος άρθρου είναι μία σύντομη και περιεκτική επισκόπηση της συγκριτικής κοινωνικής πολιτικής. Πεδίο πολιτικής που χαρακτηρίζεται τόσο από προκλήσεις όσο και οφέλη, η συγκριτική κοινωνική πολιτική άρχισε να αναπτύσσεται τη δεκαετία του 1960, περίοδο κυριαρχίας του Κεϊνσιανού κράτους προνοίας. Η δημοσίευση του έργου *Οι Τρεις Κόσμοι του Καπιταλισμού της Ευημερίας* από τον Esping-Andersen το 1990, σε μία εποχή παντοδυναμίας του Σουμπετεριανού κράτους προνοίας, συμπίπτει με το ξεκίνημα μίας νέας περιόδου για τη συγκριτική κοινωνική πολιτική, η οποία θα καταλήξει στην αναγνώρισή της ως ξεχωριστού πεδίου κοινωνικής πολιτικής. Στο άρθρο συζητούνται τα κύρια χαρακτηριστικά της κάθε εξελικτικής φάσης του πεδίου, όπως π.χ. η πρωτοκαθεδρία των περιγραφικών μελετών και της λειτουργιστικής οικογένειας εξηγήσεων για το κράτος προνοίας στην προ του 1990 περίοδο, αλλά και η κυριαρχία από το 1990 και πέρα των ταξινικών σχημάτων για το κράτος προνοίας. Παρά τις προκλήσεις που πρέπει ακόμη να ξεπεραστούν, ο πολλαπλασιασμός των μελετών που εμπίπτουν στο πεδίο της συγκριτικής κοινωνικής πολιτικής δημιουργεί αισιοδοξία για το μέλλον της.

**ΛΕΞΕΙΣ-ΚΛΕΙΔΙΑ:** Συγκριτική κοινωνική πολιτική, ιστορική επισκόπηση, θεωρία καθεστώτων ευημερίας.

## Introduction

**A**lthough comparative social policy was previously regarded as an almost exotic activity, since the 1960s and especially after the publication of Esping-Andersen's seminal book *The Three Worlds of Welfare Capitalism* it has become increasingly popular (Midgley, 2013: 182). The temporal evolution of the field reveals a fascinating story, which includes analytical emphasis on a range of themes, similar or different to those that dominated the past efforts of scholars. These are exemplified by the focus on concepts such as modernization, convergence and social expenditure as a measure of welfare effort that were crucial to the development of the field mainly in its early years, as well as by the regime classification that became the main driver of the evolution of comparative social policy since the 1990s.

However, what exactly do we mean by 'comparative social policy'? The contested nature of 'comparative' and, especially, 'social policy' make it difficult to define both the field of comparative social policy and the field's boundaries. To begin with, although the use of the term 'comparative' in the field's name – which, put simply, means to utilize a methodology that allows researchers to highlight differences and similarities in the units of study – seems more clear-cut than the use of 'social policy', it does not, as will be discussed next, come without ambiguity. For instance, comparative does not necessarily mean cross-national. Social policies may be studied in a single country and may be compared over time. Units of analysis take various forms, such as countries, federal states, regions and local authorities.

Small-N studies usually emphasize the impact of the social, political, economic, cultural and ideological context on national social policies, whilst large-N studies usually conceptualize countries as representing a set of quantifiable variables, such as levels of Gross Domestic Product (GDP), social spending, etc.. Comparison in the social sciences is used as a substitute for experimentation in the natural sciences and is typified by major issues, as exemplified by the problematic operationalization of variables, and the non-equivalence and ensuing non-comparability of data (Mabbett and Bolderson, 1999).

In a similar vein, Wilensky et al. (1985) rightly contend that social policy is a diffuse and residual category. Indicative of this diffuseness and the residual nature of social policy is the fact that, despite it usually being regarded as confined to a number of programmes such as social security and social services, other public policies such as tax allowances may also be classified as social policies. The common ground for policies to be categorized as social policies appears to be that they aim to enhance the well-being of individuals (Clasen, 2013: 71).

More often than not, attention is given to state policies and not to actions promoted by the private sector and civil society. Apparently, one should seriously take into account the fact that the main volume of welfare policies is developed on the initiatives of state agencies. Yet, ignoring the role played by, for instance, the family or the third sector in the development and provision of welfare policies poses serious limitations to our understanding of social policy.

Additionally, there is still no consensus as to whether social policy is a separate academic discipline, as are economics and sociology, or a field of research that attracts scientists from different disciplines who decide to develop a social policy expertise. Some claim that the institutional recognition of social policy in countries such as the United Kingdom is a key factor in claiming that social policy is an academic discipline in its own right, and in fact one that bears many similarities with public policy. Others still believe that the lack of special methods and

approaches makes social policy a multidisciplinary field of study. Depending on the focus of the policy analysis, scholars draw on comparative politics, public administration, macro-sociology, political economy, history, economics or social philosophy. According to this latter point of view, which seems to be held by the largest share of social policy analysts, social policy lies at the intersection of social sciences such as sociology, economics and political science, resulting in a multidisciplinary character that can also pose methodological problems (Clasen, 2013: 72-73).

In conjunction with the complexity of 'comparative' and especially 'social policy' that makes it a relatively diffuse field of study, comparative social policy suffers from a range of challenges. Indicative of this is the fact that the 'mainstream' comparative social policy approach utilizes a Western welfare state perspective that fails to address the realities of non-Western countries. The implications of this approach include the fact that for years the literature on social policies in non-Western countries received very little attention.

This ethnocentric bias also means that, despite delivering minimal benefits on the basis of need, residual welfare states such as that of the United States are regarded as a welfare state (Walker and Wong, 2013: 101, 110). In this way, however, scientific inquiry is hindered and serious limitations are posed for comparative social policy analysis.

Interestingly, it should also be noted that, despite the emphasis on Western concepts and Western social policies, in parts of this developed welfare world comparative social policy remains relatively underdeveloped. If countries such as the United Kingdom, Germany and Sweden have developed a tradition in comparative social policy analysis, in countries such as Greece the field remains relatively underdeveloped, as exemplified by the scarcity of comparative social policy courses in university curricula and the lack of specialized academic journals in this particular field of study.

Furthermore, 'mainstream' comparative social policy has neglected normative concerns. Implicit normative preferences reflect, once again, the dominance of Western ideas at the expense of concepts that may have been more suitable to describing non-Western ways of thinking (Midgley, 2013: 182-183, 186, 189).

However, at the same time, comparative social policy analysis comes with a number of significant benefits. For example, given that comparative social policy studies usually cover the same phenomena in two or more countries, by studying and comparing the social policies pursued in these countries we are encouraged to think more about domestic policy arrangements. This might make us wiser, in the sense that it gives birth to new questions and answers that may be applicable to real life problems. Comparison may also function as a form of evaluation for domestic arrangements. Additionally, it enlarges the empirical basis for testing hypotheses and renders potential findings more robust (Clasen, 2007).

Recent efforts to delve into comparative social policy issues may be found in the contributions to the 2010 Oxford Handbook of the Welfare State edited by Castles et al. or the 2013 volume edited by Kennett under the title Handbook of Comparative Social Policy. The list of earlier contributions to this strand of research is long. For example, Rodgers et al.'s 1979 book contained a comparative approach to the study of social policy. In 1985 Wilensky et al. edited a book on the theories, methods and findings of comparative social policy. Ginsburg's 1992 book on divisions of welfare was a critical introduction to comparative social policy. Castle's 1998 book focused on comparative public policy and the patterns of post-war transformation. In 1999 Clasen edited a volume on concepts, theories and methods in comparative social policy. The list – which is clearly

not complete here – continues with works published in the 2000s, such as the 2001 volume edited by Cochrane, Clarke and Gewirtz on the comparison of welfare states and the 2006 book written by Hill that took a thematic approach to comparative social policy.

Against this backdrop, this review article is primarily an effort to provide the reader with a succinct historical overview of the evolution of comparative social policy and of the major themes that dominated this field from its early days to the present. The article reviews key contributions to the field although without aiming to engage in a more critical analysis of major trends and phases in the evolution of comparative social policy, or to challenge ideas that have developed over the years. It puts at its centre primarily ‘explanatory factors’ and ‘welfare state typologies’ as the major themes shaping the historical evolution of comparative social policy, also taking into account recent scholarship, such as that on ‘recalibration’ or ‘social investment’ as crucial issues in the discussion on the present and future of the field.

The article’s added value in relation to the existing literature is, first, that it provides the reader with a bird’s eye view of the evolution of comparative social policy, which, given the time span and the broadness and complexity of the field, is a particularly challenging task. Furthermore, the article’s contribution to the literature lies in that it finds differences and similarities in the different phases of the development of the field. That being said, the author takes a humble approach to fulfilling this task, acknowledging the limitations of this very difficult exercise from the beginning.

The first section of the article focuses on the evolution of the field during its early days, a period which schematically extends up to the late 1980s. The second section pays particular attention to Esping-Andersen’s 1990 seminal book as a turning point for comparative social policy. The third section discusses the alternative typologies whose birth Esping-Andersen’s typology encouraged and other main themes that attention has been given to in the post-1990 period and up to the present day. The last section synthesizes and discusses findings, as well as key challenges for the field.

## 2. The Early Days of the Field: Evolution and Themes in the Pre-1990 Years

**M**ost of the early days in the development of the comparative social policy field coincide with the era of the so-called Keynesian welfare state that is associated with the post-war Fordist growth dynamic based on mass production and mass consumption. This state aimed to secure full employment in a relatively closed economy, mainly through demand-side management. It instituted economic and social rights for all citizens and was national insofar as economic and social policies were pursued within the context of a national economy, state and society. Finally, it was statist in that state institutions were the chief institutions that supplemented and corrected the effects of market sources (Jessop, 2013: 13-15).

Thus, from the 1950s up to the 1970s, although much less so in the 1980s when the foundations of the Keynesian welfare state faltered, the discourse in comparative social policy was associated with the notion of Keynesian welfare capitalism and whatever this type of capitalism stood for. This included the commitment to extended social citizenship and the guarantee of a certain minimum standard of life and security. Social rights were perceived as the outcome of a developed society.

Already in the 1950s comparisons such as those between the policies of capitalist, state socialist and underdeveloped societies were employed (Crow, 2013: 93). Nonetheless, it was in the 1960s that comparative social policy, meaning studies that adopted a comparative approach to social policies in one or more countries, experienced growth. This growth concerned not only the number of studies produced and countries analysed, but also the range of the approaches utilized. As will be discussed later in this section, this was a period during which the foundations of most of the major strands that would characterize social comparative policy up to the present day were to make their appearance.

In the 1960s the first examples of comparative social policy analysis may be found in the works of scholars such as Rodgers et al., who in 1968 wrote *Comparative Social Administration*, or Jenkins, who in 1969 edited a volume titled *Social Security in International Perspective*. In these early days, comparative social policy was quite close to comparative public policy and the focus was on 'mainstream' government social policy programmes, such as social security. In the 1970s, works such as Kaim-Caudle's 1973 *Comparative Social Policy and Social Security: A Ten-Country Study* and Rodgers et al.'s 1979 *The Study of Social Policy: A Comparative Approach* took up the baton (Clasen, 2013: 73, 77).

These pioneering books offered descriptive accounts of welfare provision mainly in countries of the developed, Western world, such as Britain, France, the United States and Sweden. Their main aim was the intensive description of social policy programmes in different countries, preceded by only a brief discussion of an analytical framework. Attention was paid to systematic country-by-country discussions of social policy programmes. Researchers were usually interested in the adequacy of provision, the coverage of the population, and the equity of different groups in the population. Over time, the value of descriptive studies, especially when they were not accompanied by a wider conceptual framework, would diminish.

Modernization, convergence and social expenditure – the relative share of the GDP that was devoted to social policy programmes as a measure of welfare effort – were the key variables that dominated comparative social policy up to the 1970s. Attention was also paid to the different timing and stages of the development of social policy programmes in different countries. A macro-sociological point of view determined the debate on welfare change.

The roots of two of the three broad approaches to comparing welfare states – the functionalist and political families of explanations – may be found in this early period (see e.g. Myles and Quadagno, 2002). Functionalism underlines the existence of strong socioeconomic forces or structures that shape the development of welfare states, as exemplified by the works of Cutright and Wilensky in 1965 and 1975 respectively, who argued that welfare state emergence and development are largely a response to socioeconomic pressures. Economic development or globalization are examples of such forces. Under the functionalist perspective, the political organization of social demands or governmental institutions are regarded as neutral or determined by socioeconomic change (Zutavern and Kohli, 2010: 173-174).

The political family of explanations, as exemplified by the power resources approach, proposed that politics matter and that there exists a relationship between the power of political actors such as parties or the labour movement and welfare capitalism. The power resources concentrated in a working-class social movement are an example of such a shaping factor (Ginsburg, 2013: 162-163). In the 1970s and 1980s political variables, such as the strength of organized labour, were to be found at the centre of analysis, as exemplified by the works of Stephens (1979) and Korpi (1983).

Furthermore, whereas the roots of descriptive studies in comparative social policy may be found, as mentioned above, in this early period, the same holds true also for evaluative and theoretical studies. Studies that focus on the evaluation of particular types of social interventions or on specific problems such as poverty started to develop in the 1980s, in parallel with the development of new and improved databases. Comparative evaluative work in social policy has contributed greatly to our understanding of welfare effort, both in showing how welfare effort can be made up of a range of interventions and in drawing attention to the complex relationship between effort and outcomes (Mabbett and Bolderson, 1999). Examples of evaluative studies from this period may be found in the works of Bradshaw and Piachaud (1980) or Walker et al. (1983) (Clasen, 2013: 78).

The generation of theory or theory-testing is another branch of comparative social policy, which is responsible for some of the most classic works in comparative social policy analysis, as exemplified by the studies of Heclo (1974), Wilensky (1975), Flora and Heidenheimer (1981) and Flora (1986) (Clasen, 2007). Comparative social policy was viewed as a methodological device to test theoretical hypotheses regarding the emergence and development of welfare states. Scholars usually drew on other 'grand' theories of political and economic development, such as industrialism and industrialization. More often than not these studies tended to treat the welfare system as a whole rather than examining particular areas of social policy. Inputs, outputs and outcomes were all viewed as aspects of a welfare configuration. Differences in welfare effort across countries and differences in welfare state configurations were arguably the outcome of economic, political, cultural or institutional factors or of their combined impact (Mabbett and Bolderson, 1999).

This proliferation of studies paved the way for comparative social policy being perceived as an increasingly autonomous field of study. Yet, it was the publication of Esping-Andersen's seminal 1990 book that was to mark the point of no return for this recognition.

### **3. Esping-Andersen's Seminal 'The Three Worlds of Welfare Capitalism' as a Turning Point**

**T**he second main period of development for the field of comparative social policy arguably begins schematically in 1990 and extends up to the present day. Although periodization always presupposes a certain level of abstraction and generalization, that year is crucial to future developments in the field. This was the year in which a Danish sociologist, Gøsta Esping-Andersen, published *The Three Worlds of Welfare Capitalism*, a book that was to have a drastic effect on the evolution of the field of comparative social policy for the forthcoming decades.

The publication of Esping-Andersen's book came at a time when there were signs that the Keynesian welfare national state that had been dominant up until the 1970s was being replaced by the so-called Schumpeterian work-fare post-national regime. Given that Schumpeter is the theorist of innovation and competition, this regime is Schumpeterian insofar as it tries to promote permanent innovation and flexibility in relatively open economies by intervening in the supply side, while subordinating social policy to the demands of labour market flexibility and employability. Moreover, it is post-national as far as the national territory has become less important as an economic, political and cultural locus of power. This type of regime also increasingly

relies on non-state mechanisms for economic and social policies (Jessop, 2013: 24-25). During the same period, the growing forces of globalization encouraged cross-national research at the expense of single-country studies.

In this context, Esping-Andersen's *The Three Worlds of Welfare Capitalism* underlined the under-theorization of contemporary comparative social policy research, especially the degree to which the amount of social spending did not capture the essence of a welfare state. More specifically, he underscored the salience of three major issues: the degree to which a social security benefit or social service is rendered as a right, enabling an individual or family to survive without reliance on the market (the degree of 'decommodification'); the way in which the state, the market and the family interact in the production of social welfare (the public-private mix); and the stratification system, namely the degree to which the welfare state differentiates between different groups promoted by social policy and upheld by the institutional mix of the state, the market and the family (the extent of status and class differentiation and inequality) (Arts and Gelissen, 2010: 570-571).

Esping-Andersen contended that history and politics matter. He adopted a power resources approach, one that looked at the influence of interest groups (organized labour and employers) in advancing or hindering social policy development (Korpi, 1983). The Danish sociologist concluded that there are three ideal welfare types and developmental trajectories: a social democratic or Scandinavian model characterized by high levels of decommodification, cross-class solidarity and the powerful presence of the state; a liberal or Anglo-Saxon model typified by low levels of decommodification and high levels of private welfare spending; and a conservative/Continental model manifesting a moderate level of decommodification, solidarity related to occupational status, and a commitment to subsidiarity and the preservation of traditional family structures (Arts and Gelissen, 2010: 570-571).

According to Esping-Andersen's taxonomical system Scandinavian countries such as Sweden, Norway, and Denmark belong to the social democratic or Scandinavian model. Countries such as the United States, Australia, Canada, and, to a lesser extent, the UK are classified as liberal. Continental European countries such as Germany, France, and Italy belong to the conservative/Continental model.

Esping-Andersen's highly influential welfare typology paved the way for a significant amount of comparative social policy analysis being devoted to the construction of welfare taxonomies, such as the ones discussed in the next section. His typology adds to a series of taxonomical efforts, from Wilensky and Lebeaux's 1965 depiction of social welfare in the United States as evolving from a residual to institutional approach to the works of Titmuss (1974), Furniss and Tilton (1977), and Mishra (1984). More specifically, Esping-Andersen's typology builds on the earlier categorization of the welfare state by Titmuss (1974), who argued that there were three conceptions of the role of social policy and they were linked to different principles of entitlement to benefits and services. Earnings-related contributory systems reflected an 'industrial achievement performance' conception, universalism an 'institutional' conception, and means-testing a 'residual' conception of social policy (Mabbett and Bolderson, 1999; O' Connor, 2013: 143).

Esping-Andersen's seminal book was greeted with high praise for four main reasons. First, it was not characterized by normative and teleological overtones, but drew on a solid empirical and theoretical basis. Second, in contrast to other contributions to the literature, Esping-Andersen explained why there was a continuing divergence in the welfare development of different



countries. Third, the book provided systematic empirical validation for the existence of three ideal welfare types. Fourth, Esping-Andersen set up the elements in the various welfare state regimes as independent variables, which could explain internationally divergent outcomes (Arts and Gelissen, 2010: 571-572).

However, the book also faced extensive criticism. Some critics rejected altogether the idea of clusterization or argued that typologies have no explanatory power (see Baldwin, 1996, and Kazsa, 2002 respectively). Others claimed that there were more welfare regimes than those described by Esping-Andersen (see e.g. Ferrera) while other critics argued that there were methodological weaknesses (see e.g. Bamba, 2006).

Overall, there were four main criticisms of Esping-Andersen's work. First, that he neglected gender. Indeed, for this reason he later introduced (1999) small alterations to his theory. Second, that he was wrong in not classifying Mediterranean countries as a distinct cluster of countries. Third, that he mistakenly labelled Australia and New Zealand, i.e. the Antipodean welfare states as 'liberal'. Fourth, that he failed to take into account the contribution of employers to welfare state development. Finally, part of the debate that was triggered thanks to Esping-Andersen's seminal work considered whether there were also distinct welfare regimes for developing countries, as exemplified by an Asian, a Latin American and an Eastern European welfare regime (Arts and Gelissen, 2002, 2010).

In an effort to evaluate the resilience of Esping-Andersen's typology, Arts and Gelissen (2010: 574-577) argue that even when different indicators are used to classify welfare states, the same countries emerge as ideal types. The United States, Germany and Sweden are the archetypes of the liberal, conservative and social-democratic regimes respectively – with the liberal also being called Protestant, Anglo-Saxon, British, or basic security, the conservative Bismarckian, Christian-democratic, Continental, corporatist, and the social-democratic also non-right hegemony, encompassing, and Scandinavian/Nordic. Most other countries are of less pure types. At the same time, the mixed empirical evidence relating to Esping-Andersen's work reveals that a case can be made for extending the number of welfare regimes. Moreover, some cases are close to the ideal types but there are no pure cases. Last, if social programmes other than those considered by Esping-Andersen are taken into account, they do not easily conform to his welfare regimes.

Nonetheless, *The Three Worlds of Welfare Capitalism* continues to be the point of reference for comparative welfare state research. This can be confirmed by the more recent discussion on Esping-Andersen's contribution to the evolution of comparative social policy, as seen, for example, in two of the most influential journals in the field, *Journal of European Social Policy* and *Social Policy and Society*, which in 2015 devoted special issues to the impact of the Danish sociologist. Criticism is also expressed in these two issues. Critical remarks are exemplified by the fact that the nature of class as the basis for political mobilization and coalitions has changed significantly since 1990 (Gingrich and Häusermann, 2015) and that the initial framework promoted by Esping-Andersen ignored welfare services and the industrial sector of the economy (Buhr and Stoy, 2015).

Yet, it is also argued that the claims and findings of *The Three Worlds* are often taken for granted rather than challenged (Emmenegger et al., 2015). The publication of the two special issues on the 25th anniversary of the publication of Esping-Andersen's seminal book speaks for itself.

Taking everything into account, the bottom line is that from 1990 onwards social policy research took an increasingly comparative turn, one that would place the 'welfare modelling business' (Abrahamson, 1999) at its heart. The obvious precondition for this was the establishment

and continuous sophistication of comparative databases that collected data not only on income, labour market characteristics and other demographic features of individuals and households, but also on more 'peripheral' issues as exemplified by the collection of data on welfare attitudes and public opinion.

## 4. Alternative Typologies and Main Themes in the Post-1990 Years

Some of the subjects of comparative social research that were rooted in the pre-1990 years continued to be at the centre of analysis after 1990, as exemplified by evaluative studies, such as Mitchell's 1991 study on the targeting efficiency and poverty reduction efficiency of the social security systems of ten countries, and Bradshaw et al.'s 1993 study on child support in fifteen countries. In a similar vein, the effort at theory-building, also reflected in Esping-Andersen's seminal 1990 book, would continue. Illustrative of this are the studies by Baldwin (1990), Van Kersbergen (1995), Hall and Soskice (2001), and others.

Nonetheless, one of the main – if not the main – effect of Esping-Andersen's 1990 work on worlds of welfare capitalism was the proliferation of the 'welfare modelling business'. The identification of groups of countries that shared similar features, the construction of different typologies of welfare systems, alongside examining how the patterns of development of welfare families/regimes emerged became extremely popular (Arts and Gelissen, 2002). In spite of the continuing debate on the appropriateness and the boundaries of welfare clusterization as a tool to assign different countries to differing welfare regimes, classification still continues to fascinate social policy scholars.

Most of the welfare typologies produced during the post-1990 years were associated with the criticisms of Esping-Andersen's work outlined in the previous section. Some were related to gender. Others to the idea that the Mediterranean, i.e. Italy, Portugal, Spain and Greece, and the Antipodean countries, i.e. Australia and New Zealand, formed types of welfare states distinct from the ones described by Esping-Andersen. Yet other criticisms related to the perception that employers are crucial to welfare development, as reflected in the Varieties of Capitalism (VoC) approach.

As far as the classification of the Mediterranean countries is concerned, Esping-Andersen argued that Italy was representative of a 'conservative-corporatist' welfare state, and he did not include Greece, Portugal and Spain in his analysis. However, all four countries, according to scholars such as Leibfried (1992) or Ferrera (1996), to cite only the initial two who individually coined the term 'Mediterranean regime', are regarded as belonging to a distinct welfare regime that is typified by extended rates of an underground economy, strong familialism and underdeveloped social assistance, to mention just a few of its characteristics.

In a similar vein, whereas Esping-Andersen classified the Antipodean countries, that is Australia and New Zealand, as liberal or Anglo-Saxon, others (see e.g. Castles and Mitchell, 1993) argued that these countries are characterized by a welfare state with distinctive characteristics compared to the liberal model. For example, they contend that the Antipodean welfare state is typified by an approach that is more inclusive than the standard liberal form (Arts and Gelissen, 2010: 573).

In the early 2000s the idea that the contribution of employers to welfare state development was neglected could be found at the centre of the VoC approach to welfare regime classification. A central concept in this approach is that of 'institutional complementarities', meaning that all major capitalist institutions are complementary, i.e. the industrial relations system, the financial and corporate governance system, the training and the innovation systems. The effectiveness of one institution depends on the design of another. Skills and firms are also placed at the centre of analysis. The VoC approach is based on the assumption that economic institutions are designed to help firms and other economic agents utilize their productive assets in the best way, and is significant in showing that the welfare state and the market are not necessarily contradictory institutions. Furthermore, it provides an explanation as to why, despite the forces of globalization, institutional diversity persists (Iversen, 2010: 184, 192-193).

Hall and Soskice (2001) argued in favour of the existence of two ideal types of welfare states: the 'liberal' and the 'coordinated'. Liberal market economies fit liberal states. In these economies, training systems focus on general skills, making a high level of social protection less necessary. Coordinated market economies rely on specific skills and require a high level of social protection. Hall and Soskice also agreed on the existence of a Mediterranean type of welfare capitalism. Their work found continuity in the writings of scholars such as Swenson (2002) and Mares (2003).

More recent works, as exemplified by Schröder's 2013 book, discuss how the VoC approach is integrated into welfare state research. Schröder considers the causal interrelations between different types of production systems and their respective welfare systems. He argues that each form of capitalism tends to be 'stabilized' by 'complementarities' between its particular production and welfare arrangements. For example, extended and generous welfare arrangements are thought to encourage workers to acquire the often highly specific skills needed for a coordinated production regime.

Welfare typology has developed healthily, with recent additions including an 'informal security regime', in which the division of labour is not uniquely determined by a capitalist mode of production, exploitation is accompanied by exclusion and coercion, and political mobilization can take a different form than usual (Gough, 2013: 210-211). Specific mention should also be made, however, of the additional characteristics of the field of comparative social policy in the post-1990 period. It should be acknowledged that, overall, during the last decades the number of scholars involved in analysing social policy problems in a comparative and especially cross-national perspective has grown. The emergence of comparative social policy as a separate stream of study within social policy is also reflected in the addition of comparative social policy as a course offered on university curricula, as well as its appearance in the titles of academic journals (Clasen, 2013: 76).

This growth, which was facilitated by the availability of more systematic data by supranational agencies, should be viewed, as mentioned above, in conjunction with the end of Keynesian welfare capitalism. The comparative social policy agenda has been dominated by the erosion of the certainties of the past, the emergence of new social risks and a rhetoric of deregulation. Landmarks include the collapse of the Soviet Union and the strengthening of supranational actors, such as the European Commission (Clasen, 2007). Globalization, transnationalism and European integration meant that it became important to look beyond the boundaries of the nation-state. Scale became increasingly significant for social policy analysis.

The ensuing debate encouraged, aside from social spending, the adoption of other variables, such as social rights, to capture welfare change; the discussion of which, starting with Pierson's 1994 book, focused on welfare restructuring and welfare retrenchment. The discourse on the role of the state in welfare emphasized the rebalancing of the social contract between the state and the individual and between rights and responsibilities.

Individual country analyses also often became connected to a wider conceptual framework, which allowed inferences for social policy convergence or divergence between different countries. In this period, an extensive literature was produced on welfare convergence (see e.g. Swank, 2002), welfare divergence (see e.g. Kuhnle and Alesstalo, 2000), but also welfare state retrenchment (see e.g. Korpi, 2003), and welfare resilience (see e.g. Castles and Obinger, 2008).

In analysing the differences between welfare states, the role of ideas, processes and culture became obvious, and the distance between different research strands diminished. More political scientists became involved in social policy analysis. Political partisanship and institutions became increasingly important.

While the political family of welfare state explanations was largely represented in the pre-1990 period, institutionalist explanations, the third broad approach to comparing welfare states alongside the functionalist and political approaches, experienced a growth from 1990 in particular. Institutionalism suggests that particular institutional forces play a key role in the development of the welfare state. State capacity, state structures and bureaucratic policy learning are examples of such forces. Scholars influenced by institutionalism analyse the role of political decision-making structures, government systems and bureaucracies on the development of social policy (Mabbett and Bolderson, 1999), as exemplified by the works of Huber et al. (1993) and Cusack et al. (2007).

Religion-, party- and union- and employer-centred analyses of welfare states also had their share of the comparative studies produced since 1990. In terms of religion as a variable of comparative welfare state analysis, there are two different approaches: one 'ideational', tracing the impact of religious doctrines on social policies, and one 'political', tracing the impact of religion on policies via parties and systems of interest mediation (Van Kersbergen and Manow, 2010: 267). The second approach may thus be viewed as relating to a 'politics and parties matter' approach.

Deriving from the actor-centred institutional theory of democratic political markets, the view that political parties are crucial to the development of social policies has been at the centre of a voluminous body of literature that was rooted in the 1970s and 1980s and reached a peak in the 1990s and 2000s. Examples include the works of Schmidt (1997), Huber and Stephens (2001) and Castles (2007).

Although comparative research is often separated into that on industrial relations and that on welfare states, more recent studies on the development of welfare states have de-emphasized the roles of unions, as opposed to earlier studies that emphasized the mobilization of labour as a key factor for the advancement of social policies. Furthermore, as also discussed above, there is a new focus on the role of employers (Ebbinghaus, 2010: 210).

In the last decades, an increasing number of scholars have begun to embed their analyses in a historical context. Comparative historical analysis usually focuses on big questions and macro-level analysis, and attempts to produce something theoretically portable, a line of causal argumentation that is conceptualized so as to apply to other cases or time periods (Amenta, 2003). Historical analysis meets institutionalist analysis in historical-institutionalism, an approach that

combines a historical orientation with attention to the ways in which institutions shape welfare outcomes. Examples include the works of scholars such as Steinmo (1993), Skocpol (1995), Pierson (1996) and Thelen (2004).

As shown by Lynch and Rhodes (2016), historical institutionalism was a predominant approach in welfare state research, with the former overlapping significantly with the analysis of welfare states. Whilst the roots of the approach may be traced back to Hecló's 1974 *Modern Social Politics in Britain and Sweden*, since the 1990s historical institutionalism played a key role in tackling big, real-world questions regarding welfare state development. The most common criticisms of historical institutionalist works include the insufficient attention given to actors as opposed to structures, a difficulty in explaining change, and the unclear and limited role for ideas, values and attitudes.

Comparative social policy is also experiencing growing internationalization, as reflected in the works that focus on the so-called emerging welfare states, such as the Latin American, East Asian and Eastern European and Russian welfare states (Castles et al, 2010: 644-686). Furthermore, especially since the 2000s, the 'recalibration' of the welfare state has been at the centre of analysis in comparative social policy, being defined as the adaptation of the welfare state to new social demands (Hemerijck, 2013).

The establishment of the 'social investment state', meaning a state that invests in people's capacities, is regarded as relevant to the new directions of change, such as those related to 'recalibration'. Although important features of the 'social investment perspective' may be found before the 1990s, the 'social investment state' has been identified as a distinct welfare paradigm mainly from the 2000s (Morel, Palier and Palme, 2012).

Finally, the concept of 'recalibration' mentioned beforehand has gradually replaced the term 'retrenchment', although both terms are at the heart of the discussion concerning the severe implications of the crisis and austerity measures for the welfare state (see e.g. Dukelow and Considine, 2013). This discussion plays an increasingly important role in the evolution of the field. The crisis and austerity measures have triggered a new series of studies on the impact of crisis and austerity on welfare programmes in a comparative perspective, as exemplified by the 2011 volume edited by Farnsworth and Irving titled *Social Policy in Challenging Times: Economic Crisis and Welfare Systems*, or the 2015 volume titled *Social Policy in Times of Austerity. Global Economic Crisis and the New Politics of Welfare* by the same editors.

## 5. Conclusions

**A**t a time when the so-called Keynesian welfare state dominates and in spite of not yet being fully recognized as a distinct stream of study, comparative social policy started to experience a growth in the 1960s, as reflected mainly in a number of descriptive studies that were close to the public policy field. While the roots of the comparative social policy field were put in place in the 1960s and 1970s, the field would experience its most glorious days from 1990. During a period typified by the replacement of the Keynesian welfare state by a Schumpeterian one, this was also the year in which Esping-Andersen's seminal book on the three worlds of welfare capitalism was published.

Although taking the year 1990 as the dividing line between the two main periods of development of comparative social policy analysis necessitates a certain degree of abstraction and

generalization, the 1990 publication of Esping-Andersen's work coincides with the beginning of a new period for comparative social policy. It is doubtful whether another work in the field of social policy has been so influential for the scholars of its time and future generations. To a large degree, this can be summed up as that the idea that there are different types of welfare state came to replace the former emphasis on ranking welfare effort. Furthermore, the book was published at a time when the borders of the old world as we knew it had changed, and globalization and similar forces had triggered a fiery debate on the future of welfare states.

The two evolutionary phases of the development of comparative social policy share similarities and differences. One of the main similarities regards the persistence of theory-building, as opposed to descriptive studies and to a lesser extent evaluative studies. Descendants of the greats of the social sciences, who in the eighteenth and early-nineteenth century utilized the comparative method to test theories about the development of societies, formulated universal social laws and explained particular configurations, may be found in both phases. This is exemplified by the works of Wilensky (1975), Esping-Andersen (1990), and others (Mabbett and Bolderson, 1999).

Functionalist explanations, alongside political explanations, dominate the pre-1990 period, whereas institutionalist and political explanations have dominated in the post-1990 years. Moreover, although the political variables reach their peak after 1990, they are important in comparative social policy in both periods.

Amongst the major differences between the two periods in the development of comparative social policy is the omnipotence of the 'welfare modelling business' since 1990 and the emergence of a range of typologies. These include mainly gender-related typologies, typologies that concern the Mediterranean or the Antipodean countries, and others that are associated with the VoC approach. This proliferation of taxonomies is largely a response to Esping-Andersen's typology. Regime theory emphasized the interaction between social policies and political and economic institutions (Mabbett and Bolderson, 1999), and was accompanied by the creation of new and the improvement of old databases.

Both the evolutionary phases of the development of comparative social policy made the field more mature, eventually gaining for it recognition as a distinct stream of study, as reflected in the titles of courses in university curricula and academic journals. The future of the field thus appears promising.

However, a number of key challenges needs to be overcome. Above all, the ethnocentric bias that, at a time of growing internationalization, still characterizes the field. An effort should be made, therefore, for the field to incorporate non-Western ideas as well.

This should be accompanied by an endeavour to develop more solid foundations for comparative social policy in countries of the so-called developed Western world such as Greece, where the field remains relatively underdeveloped. The positive message to be shared with scholars here is that this relative underdevelopment leaves significant space for future contributions to the field, in line with the more recent progress noted at the global and European levels.

Last but not least, more attention should be paid to practical matters, namely seeking real-life solutions for demanding social issues. Without expressing any doubts on the greatness of theory and theoretical debate, we should not forget that comparative social policy is, in its essence, an applied social science and, as such, it must provide answers, not just questions.

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