

# Three worlds of welfare capital politics essay



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The three worlds of welfare capitalism” written by Esping- Andersen in 1990 set the bar for welfare typologizing and has sparked a volatile and ongoing debate ever since. Most of the literature for those studying and analysing social policy is now based around mending or re forming “ the welfare capitalist” in to something which acknowledges more factors which shape welfare provision and bring the original txt in to a modern or argument/ issue specific context. Issues such as gender, the role of the family and an expansion of the original categories of Welfare state have been the focus of much of Europe’s modern day social policy research and the defining factor in all of this research is that Esping-Andersen is almost always used as the starting point . This is the case despite the comment that “ typologizing is the lowest form of intellectual endeavour” (Baldwin, 1996, p29). No matter how intellectually miniscule it may be reported to be the process of typologizing is an essential and basic tool for carrying out and analysing strengths and weakness in welfare states and approaches to welfare and despite all the critiques and revisions it must be argued that if Andersen’s work is still being used as a basis of modern day research then it must have a fairly large amount of academic credibility left.

In the work of Esping-Andersen a typology was created by critically analysing 18 welfare states in relation to three main themes. These themes of: Decommodification; the extent to which welfare is reliant upon market forces, social stratification; the role of welfare states in maintaining society and equality within that society and the private-public mix which includes the role of the family and the voluntary sector, even though Andersen largely missed those out in his overall conclusions leading to significant criticisms

being raised about his overall conclusions. How these states operate and how decomodified they are were the main criterion which lead to these welfare states being compartmentalised in to three welfare regime types; Liberal, Conservative and Social Democratic.(Esping-Andersen; 1990)

Conservative welfare states are distinguished by their emphasis on the maintenance of status and the insurance based nature of welfare provision. Conservative welfare programmes, in which benefits are often earnings-related, are administered through the employer and what one puts in is what they get out. There is little or no redistribution of benefits or wealth within conservative welfare states. The role of the family is also emphasised and expected to some extent and a male breadwinner model is enshrined by the welfare system. France and Germany are strong examples of the Conservative model however according to Andersen so are the southern Mediterranean states which he analyzed. (Esping-Andersen; 1990)

In Liberal countries, welfare is strictly controlled with entitlement criteria, and recipients are usually means-tested. Welfare is distributed on a sliding scale to those who need it most however Welfare provision is often very low meaning that often the effects of the welfare provided are negligible.

The Social Democratic regime is the smallest of all 3 regimes. Welfare provision in social democratic countries is universal and relies on citizenship as its only real criteria for distribution. Social democratic countries try to promote full employment and the employed workforce is highly unionised. They also attempt to redistribute wealth throughout the population and there

is much less of a stigma attached to this and much more of a willingness to contribute than in other welfare regimes.

There are therefore a range of substantive critiques which can be used to critically assess “ the welfare capital” and its modern day relevance; however an important starting point would be its relationship with gender. The “ gender-blind” (Bambra, 2004, p201) concept of Decommodification and, the seeming unawareness of the role of women in the provision of welfare is startling. “ The welfare capital” has been accused of being a; “ misleading comparison of aggregate welfare state expenditure” (Bambra, 2004, p201). Not taking gender in to account has caused scholars and researchers to focus on this specific issue very acutely to point out how different the classifications of states could look with this factor included. This factor affects the Southern European states to a disproportionate degree and many researchers and scholars have therefore pointed out how different the welfare categories would be if gender was accounted for. However there are more issues than simply gender issues which could lead to the separation of the Southern states from the conservative category and this must be addressed separately to which welfare states, and welfare state regimes, facilitate female autonomy and economic independence from the family. We must also assess the shift from the male worker model to the Adult worker model as well as the role of women in the home and look at how this has affected state policy and welfare provision. Many states now encourage women to enter the workplace and welfare is increasingly becoming about the individual rather than the family. This is certainly the case in some conservative countries but much less so in the southern welfare states of

Europe. If Andersen had taken this factor into account then once again we could likely have seen a very different set of results produced.

The range of countries used to construct Esping-Andersen's typology has met with criticism. Esping-Andersen only examined 18 OECD countries. This led to countries such as Greece and Germany being grouped in the same category. Considering the economic differences and differences in terms of social structure this seems to be an unrealistic conclusion. It has therefore been suggested that given the unique characteristics of many of the southern European nations mainly; Portugal, Greece, Italy and Spain there is sufficient scope to create a fourth southern European welfare category. In the Journal of European Social Policy Arts and Gelissen state "it seems logical to see the South European countries as a separate cluster" (Arts&Gelissen, 2002, p145). Southern welfare states are viewed as being extremely basic in their welfare provision with strong emphasis on the family and fragmented care. They do however seem to have significant expenditure in some areas and more underdeveloped and limited expenditure in others. Pensions tend to be generous in southern European welfare states and this may be a feature of reliance on the family and a strong ethic of family protection and reliance on elderly people to provide services such as child care which are not provided by the state. There are also strong criticisms of the liberal states and the huge differences in both expenditure between liberal countries in total and on specific areas. Liberal nations in Esping-Andersen's research tend to be grouped as English speaking nations however the English speaking nations listed have huge ideological differences and state approaches to welfare funding and entitlement. A number of policy

areas within nations also contravene the natural policy stances which are set out in the social categories too. For example the Universal UK NHS is not something which one would expect to see in a liberal model and it is not consistent with the criteria for the liberal welfare category and yet such policy variations have to be put aside in favour of an overall picture.

Andersen's has also been heavily criticised for his use and analysis of data and how this data has been presented and how easily manipulated it can be. Attention has been placed particularly upon decommodification indexes and the use of means to produce the final categories. This method has a noticeable impact on the classification of certain countries, eg. the UK which, if a different cut-off point was used, may not have fallen within the Liberal regime. This is highlighted in the work of Bamba where she;

“ Highlights an ...overlooked error in Esping-Andersen's original calculations that led to the incorrect positioning of three borderline countries (Japan, the UK and Ireland) and resulted in the empirically erroneous composition of the Three Worlds of Welfare” (Bamba, 2006).

Bamba Uses different methods to show how current data and the original data used by Esping-Andersen can be changed to produce very different categories of welfare to great effect and she highlights the glaring errors as well in Esping-Andersen's original calculations. (Bamba, 2006).

Therefore in conclusion it is clear that Arts and Glitsen are almost certainly correct when they state that “ Real welfare states are hardly ever pure types and are usually hybrid cases” (Arts and Glitsen, 2002). It is also however clear that there is a basic role for the “ three worlds of welfare capitalism”

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and that as a piece of work Esping-Andersen set the groundwork for the next 20 years of research and study in to European welfare spending and the grouping of European welfare states. Typologizing although a very inexact science in most cases is never the less extremely useful and we should not take that fact for granted. Nor should we take for granted the significant research that Esping-Andersen has subsequently inspired and the significant impact that his work has had on thinking within social policy.