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The Journal of Sociology & Social Welfare

Volume 38
Issue 4 December

Article 10

2011

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Recommended Citation

Midgley, James (2011) "Review of The Study of Well-being, Social Policy and the Welfare State: A Review Essay," *The Journal of Sociology & Social Welfare*: Vol. 38 : Iss. 4 , Article 10.

Available at: <https://scholarworks.wmich.edu/jssw/vol38/iss4/10>

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The Study of Well-being, Social Policy and the Welfare State: A Review Essay

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Francis G. Castles, Stephan Leibfried, Jane Lewis, Herbert Obinger & Christopher Pierson, Eds. (2010). *The Oxford Handbook of the Welfare State*. New York: Oxford University Press. \$150.00 (hardcover).

To organize the phenomena they study and to better comprehend and interpret the world, social scientists frequently employ quasi-paradigmatic frameworks reflected in the use of terms such as "globalization," "development," "human rights" and "the welfare state." These and other constructs have been widely adopted not only in academia but in media, political and popular circles as well, and they have often been a focal point for vigorous debates. This is certainly true of the welfare state, which is used both as a noble ideal and a term of derision. In the academic world, the term generally has a favorable connotation and is associated with a sizable body of explanatory and normative theory that addresses the way statutory policies and programs have contributed to social well-being over the years. It has also generated a significant amount of comparative inquiry that has been facilitated by the construction of numerous typological representations of the welfare systems of different countries.

Despite an impressive record of achievement, the welfare state perspective has limitations that are not always acknowledged by those who view the study of social well-being through its particularistic lens. Although academic inquiry into the welfare state is often equated with the broader study of the complex processes that enhance or diminish social well-being, scholars using this approach have paid little attention to non-statutory interventions such as community social support

networks, faith-based provisions, familial obligations and the services of nonprofit activities, all of which contribute to well-being. Another issue is the implicit adoption of a preferred normative perspective in welfare state studies that reflects the field's commitment to social liberalism and social democratic statism and bolsters its steadfast resistance to traditionalist and market liberal critiques. Despite its ostensible objectivity and commitment to social science rigor, the welfare state perspective reflects an historic, ideological preference for state intervention, and particularly for income transfers and social service provisions.

Another issue is the Eurocentric character of welfare state scholarship which limits its wider relevance. Although this is understandable since it has been heavily influenced by the experience of government interventionism in Europe, its comparative utility is questionable. The term's imprecise usage also presents problems. The field's literature often implies that the welfare state is a type of country where the government allocates sizable resources to social programs, but the term is also used as a loose synonym for social policy or to refer to a nexus of governmental social services. In this usage, governments are often said to "have" welfare states rather than social policies. The lack of a standard definition is also revealed in a plethora of welfare state typologies which have sought to classify welfare states but with different and often confusing results. Generally, the countries of western and northern Europe are categorized as welfare states but there is disagreement about which other countries should be designated in this way. These challenges undermine the usefulness of the welfare state approach to those seeking to understand the complex ways in which social well-being is affected by different institutionalized practices as well as government policies.

These issues are not adequately addressed in the significant book that is undoubtedly the definitive work on welfare state studies. Despite its comprehensiveness, bulky dimensions and high cost, it does not offer a clear definition of its core construct or address the limitations of its approach. Instead, it perpetuates a shared implicit understanding of its meta-theoretical assumptions and serves as a sort of in-house repository of the factual information, theories and normative beliefs with which

those working in the field will already be familiar. Those who approach the study of well-being from different intellectual, as well as normative, perspectives are less likely to find it useful except, of course, in that it offers an authoritative exposition of the state-of-the-art of welfare state scholarship.

Nevertheless, there is much in this collection of value. It is far-ranging and comprehensive and provides helpful summaries of many of the topics and issues that characterize welfare state scholarship today. The book's 48 chapters are divided into eight sections covering topics such as the history of the [European] welfare state, different approaches to the study of government provision, the key actors, policies and programs that characterize the welfare state, outcomes, and comparative typologies. The final section contains two chapters that discuss the future prospects of the welfare state. Some of the sections are well organized, but others seem somewhat arbitrary or accommodate chapters that could arguably have been more helpfully located elsewhere. Most of the chapters are relatively brief and will be appreciated by students and others who wish to have a succinct overview of key subject areas.

It is, of course, impossible to review all of the book's chapters here but some deserve special attention. Many are noteworthy for their concise exposition of complex topics and issues. The chapters in Part V of the book on core government social policies are especially helpful, offering impressive comparative summaries of fields as diverse as pensions, long-term care, unemployment insurance, family benefits, social assistance and labor market activation (or welfare-to-work as the term is more widely known in English-speaking countries). In addition to these essentially descriptive chapters, some are issue-focused and address important topics such as the impact of government intervention on employment and economic development, the effects of globalization on the welfare state, public attitudes towards the welfare state and the role of political parties in shaping government social policies.

Some chapters make a significant contribution by demonstrating the complexity of the field and showing that it is very difficult to formulate viable generalizations about government welfare provision. One example is Obinger and Wagschal's analysis of social spending in the OECD countries, which

reveals the challenges of deciding which countries have the highest levels of spending and can thus legitimately be classified as the most “advanced” or “developed” welfare states. They point out that different rankings emerge when different criteria are used. While the Nordic countries are high social spenders in terms of direct public spending, Britain and the United States emerge as high spenders when fiscal and private spending criteria are employed. They also point out that while Britain and the United States (and a few other countries as well) have lower levels of taxation than the Nordic welfare states, the former have more progressive taxation. Their review also challenges other widely held assumptions about the welfare state, showing, for example, that despite the widespread use of the rhetoric of crisis in welfare state studies and claims about the harmful effects of globalization on government welfare, social spending has increased in most OECD countries since the 1980s. The chapter contains several other interesting examples that reveal the limitations of conventional approaches to the analysis of social spending.

Another chapter that questions widely held assumptions in welfare state studies is Arts and Gelissen’s thoughtful discussion of typologies which are widely used in welfare states research. Focusing primarily on Esping Andersen’s *Three Worlds* typology, they offer what they call a “critical appreciation” of this typology by reviewing a significant body of literature that has challenged both its empirical validity and many of the assumptions on which it is based. They also discuss efforts to expand the model by, for example, including the so-called Southern or Mediterranean welfare states, the Antipodean countries, Eastern Europe and the nations of East Asia which are said to comprise a distinctive but dubious “Confucian” or “productivist” welfare type. This discussion also introduces the other seven chapters in this part of the book (Part VII). The first group of chapters deal with the Western countries which are designated as “established” welfare states, while the latter deal with the nations of Latin America, East Asia, and Eastern Europe and Russia and are described as “emerging” welfare states.

In many ways, the typological preoccupation reflects some of the problems with welfare state studies that were touched

on earlier. Apart from the Eurocentricity and normative biases of the *Three Worlds* model, major methodological, semantic and empirical issues remain unresolved. These apply equally to the well known typologies of Wilensky and Lebeaux, Titmuss, Mishra and others that are not discussed at any length. Although Arts and Gelissen conclude that the "jury is still out" on the validity and utility of the *Three Worlds* model, it is clear, as this part of the book reveals, that it still drives typological activities in the field and that these activities consume a great deal of time and effort. Although few would question the role of typologies in seeking to classify countries, the continued fixation with deciding which countries belong in which category ignores the role of non-statutory welfare activities that contribute hugely to people's well-being. This fixation also impedes a proper understanding of the multifaceted and complex factors that affect people's well-being and diverts attention from some of the most critical issues facing the world today. The persistence of political violence, the entrenched reality of poverty, exploitation and oppression and the negative effects of powerful economic and global forces on the lives of ordinary people are just some of the problems that call for the attention of scholars concerned with the study of human well-being.

Equally problematic are the assumptions used in this part of the book to classify countries. Although these are not discussed, they appear benevolently to extend the welfare state mantle to some countries but not others. This not only reflects the book's normative biases but limits the validity of welfare state typologies. While Latin America, Eastern Europe and East Asia are classed as "emerging" welfare states, the nations of Africa are excluded even though many North African countries have quite extensive social insurance systems and some in the south, such as Botswana and Namibia, have recently introduced universal old-age pensions. As has been well-documented, the government of South Africa has significantly expanded its welfare services and its now quite extensive social assistance program has had a major impact on the incidence of poverty. The African countries also have a great deal to teach the West about social and community development and non-formal welfare activities. Similarly, the Gulf states, which spend

significant amounts of public money on welfare programs, are also excluded from the book, as are other Middle Eastern countries which have quite extensive statutory provision. India is also ignored but, despite the persistence of poverty and deprivation, the country has extensive and quite innovative statutory social welfare programs. Although these and other countries may not fit the typological classification used in this book, their statutory welfare programs are as varied and interesting as those of the countries that are included. They surely deserve scholarly attention.

These realities should provoke welfare state scholars to approach the study of government social policies and programs through a different lens that does not seek to impose an artificial quasi-paradigmatic construct on reality but views it from an alternative *emic* perspective that is based on a grounded understanding of reality. Instead of attempting to make phenomena conform to externally imposed artificial constructs, an approach of this kind seeks to understand reality as it is experienced by people themselves. Less reliance on the welfare state construct would not only enrich the study of statutory welfare but welfare phenomena in general, and foster the emergence of an academic field of inquiry that promotes a fuller and more convincing understanding of social well-being. This criticism should not, however, detract from the book's overall value and significant contributions to the social policy literature. Its discussion of the many issues and challenges facing statutory welfare programs around the world today, its comprehensiveness, concise presentation of complex issues and scholarly analyses make it a valuable resource which should be widely consulted.

Gertrude Schaffner Goldberg, Ed. (2010). *Poor Women in Rich Countries: The Feminization of Poverty over the Life Course*. New York: Oxford University Press, \$39.95 (paperback).

In *Poor Women in Rich Countries: The Feminization of Poverty over the Life Course*, Professor Goldberg and colleagues revisit the topic of the feminization of poverty in advanced industrialized countries first undertaken in earlier co-edited books,