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Hey Big Spender: Testing Alternate Theories on Variance in Welfare "National Effort"

Abstract

Industrialization made possible not only the unprecedented flow of goods and services, but also the mobilization of citizens to change government policy. The countries we know today as the Advanced Industrial Democracies all responded with a 'new reciprocity' toward their citizens, meaning that the national governments took on the additional responsibility of providing for the general welfare of their people. While capitalism and democracy remained the norm in all of these countries, their welfare programs expanded in terms of people served and benefits given. Thus, each of these countries developed into a "welfare state." What started out as an economic revolution ended up having a profound effect on social policy in the Advanced Industrials.

Keywords

welfare

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**Hey Big Spender: Testing Alternate Theories on Variance in Welfare
"National Effort"**

Introduction and Statement of the Problem

Industrialization made possible not only the unprecedented flow of goods and services, but also the mobilization of citizens to change government policy. The countries we know today as the Advanced Industrial Democracies all responded with a 'new reciprocity' toward their citizens, meaning that the national governments took on the additional responsibility of providing for the general welfare of their people (Rimlinger 197 1). While capitalism and democracy remained the norm in all of these countries, their welfare programs expanded in terms of people served and benefits given. Thus, each of these countries developed into a "welfare state" (Rimlinger 197 1). So, what started out as an economic revolution ended up having a profound effect on social policy in the Advanced Industrials.

Today, the welfare states of Europe face new challenges including the European Union (EU). Even though the EU was designed as an economic agreement, it cannot help but have important implications for social policy. The EU allows labor to move freely across European borders for the first time, creating an incentive for the individual to retire where the welfare benefits are the most generous (de Swann 1994). This threat of "social dumping" or "welfare tourism," (Liebfried and Pierson 1992) makes it important for member countries to come to a united consensus on the types and amounts of benefits that should be offered. The Maastricht Treaty, the guiding political document for the European Union, set up a "very tight fiscal framework" to which all member countries must conform, despite very different economies and policies (Cochrane 1993). In addition to agreeing to the convergence criteria, which puts caps on rates of interest, inflation and exchange, and limits government deficits to 3% of Gross Domestic Product (GDP), members also agreed in the Social Charter section to work on achieving similar levels of social security benefits, a major part of social welfare expenditure (Barnes 1995).

While all Advanced Industrials today have fairly similar welfare systems that provide benefits to their citizens, individual states are unique in terms of how much they spend, what kinds of benefits they offer, what their goals are, and how close they come to achieving those goals. This paper will look at the variance in social welfare commitment-referred to in this paper as national effort-among 17 Organization for Economic Cooperation and Development (OECD) countries.' Figure I shows that national effort (percentage of GDP spent on social security and welfare) among the Advanced Industrials ranges from 0.6% in Japan to 6.6% in Denmark.

Why are some countries known as "big spenders" in terms of social welfare, while others seem stingy by comparison? Why do they differ in national effort despite the similarities of industrial revolutions, overall affluence, and democratic systems? Social scientists have many points of view from which to examine the welfare state, leading to research that appears both contradictory and inconclusive. According to Uusitalo (1984) and Lockhart (1984), literature dealing with welfare issues has been so inconsistent because researchers kept trying to explain different components of the welfare state, using different measures for the dependent variable.

In response to this dilemma, Lockhart (1984) has successfully categorized types of welfare state research as: 1) program adoption, 2) incremental change (or policy expansion), and 3) national effort, (or how much money a country spends on welfare). This paper seeks to address the question of variance in the level of national effort across Advanced Industrials.

Now I will turn to the existing literature to find the key determinants that have been suggested to explain variance in the social welfare commitment levels of Advanced Industrial nations.

Literature Review

Within the body of research conducted on the welfare state, social scientists have typically argued for one of two approaches to best explain the level of social welfare expenditure, or national effort.' The socioeconomic school states that increases in national effort are largely built-in to the cut-rent system. This means that the state promises to provide certain benefits to their welfare recipients, and any increase in the size of these populations (mainly due to social or economic factors) warrants an increase in expenditures. Yet, another idea, the "family of nations" school emphasizes is the politico-religious background as the determining factor of a country's commitment to social welfare. This commitment is expressed through the values and ambitions of both individuals and groups of policy makers. Families of nations, or countries with similar theological and political histories have consequently developed comparable levels of national effort.

Socio-demographic variables will be examined first, because these variables address increases in welfare expenditures that are fairly automatic (Schmidt 1989; Uusitalo 1984; Wilensky 1975; Pampel and Williamsen 1985, 1988). When the percentage of elderly (age 65 or older) or unemployed citizens increases, the welfare population grows, forcing the government to spend more on social welfare programs.

Also, in all advanced nations, family size has decreased (World Bank 1994), meaning there are fewer employed persons working to support the elderly who demand not only social security benefits but also expect expensive health care coverage. Thus, the first hypothesis: *as the percentage of the population over 65 in a welfare state increases, national effort increases.*

Thus, the more unemployed people there are in a country, the fewer people there are to pay into the welfare state as more people draw unemployment benefits (Schmidt 1989; Zollner 1963). This leads us to the second hypothesis: *(is the percentage of unemployed in a welfare state increases, national effort increases).*

Other variables considered important by the socio-economic school include GDP (Pontusson 1995; Cutright 1965; Wilensky 1975) and the current taxation levels (Ashford 1991). An increase in an Advanced Nation's per capita GDP can lead to increased welfare expenditures because as a country's domestic wealth increases, it has a broader tax base to collect money to spend on social services. To provide these services, the government has to hire more people, meaning citizens have a greater interest in the expansion of their government. Furthermore, as the standard of living increases, its citizens demand better services (Cameron 1978; Muller 1989; O'Connor 1988). Still, per capita GDP cannot capture a country's national effort alone; the rate at which countries tax their citizens is another crucial socio-economic variable. If GDP per capita measures the size of each country's "pie," or total resources, the variable tax rates express the size of the slice that is devoted to public expenditures. I derive the third and fourth hypotheses from this reasoning: *as GDP per capita increases in a welfare state, national effort increases* and *as the total tax receipts (as a percentage of GDP) in a welfare state increase, national effort increases.*

Within the family of nations school, there are four different variables working together that will affect national effort. The level and strength of Catholicism and Protestantism are believed to change levels of national effort in welfare states' (Flora 1987; Schmidt 1993; Esping-Andersen 1990; Castles 1994). Catholic education and doctrine both have an effect on the attitudes of individual Catholics, and by extension, on advanced nations largely populated with members of this religion, (such as France, Italy, Austria, Portugal, Belgium, and Spain). However, the teachings of the Catholic Church could lead to both increased and decreased levels of national effort.

By stressing the family structure and understanding social injustice through Catholic documents such as the 1931 Papal Encyclical *Quadragesimo Anno*, the church has promoted increased national effort. The *Quadragesimo Anno* reiterated the role of the family as being the basis for all society; and promoting the idea that government should have a familial structure. Thus, Catholic countries developed corporate structures in which policy is effectively made by a sub government consisting of leaders from the dominant parties, business, and labor. When leftist parties are in power, (as has been the case in many Western European countries since World War II) they tend to side more with labor, and higher levels of social welfare spending are likely to occur. Because of the family-like atmosphere of government in Catholic

countries, government employees tend to look out for each other's best interests, including giving themselves very generous welfare benefits (Castles 1994). Finally, Vatican II gave a message of social justice for all, encouraging Catholic countries to spend more on social welfare for all citizens (Cochrane 1993; Esping-Andersen 1990).

After establishing the principle of subsidiarity in Catholic countries and insisting on traditional gender roles, the Church has served to decrease levels of national effort. The *Quadragesimo Anno's* principle of subsidiarity says that families and non-governmental institutions are first and foremost the parties responsible for welfare provisions, setting Catholic regimes apart from all others. Also, in order to maintain patriarchy and its own authority, the Church advocated paying males a "family wage" and avoiding benefits such as child care which forces women to stay at home and have lots of children. The emphasis on traditional gender roles and family responsibility has caused these countries to be known as conservative regimes (Cochrane 1993; Esping-Andersen 1990). Thus, the fifth hypothesis states that *as the percentage of a welfare state's Catholic population increases, national effort decreases*.

Protestantism is argued to have precisely the opposite effect on national effort levels. Protestants are also believed to be more liberal than Catholics on policy issues concerning women, minorities, and homosexuals. These liberal opinions translate into generous family policies in support of working women, attempts to redistribute wealth evenly, and protection for individuals against discrimination. Because of these policies, highly Protestant countries have become known as the "big spenders" of the Advanced Industrials (Flora 1987; Schmidt 1993; Esping-Andersen 1990; Castles 1994). This takes us to the sixth and seventh hypotheses: *as the percentage of a welfare state's Protestant population increases, national effort increases* and, by extension, *Protestant nations will have higher levels of national effort than will Catholic nations*.

The strength of the left in society (Furniss and Tilton 1977; Hewitt 1977; Cameron 1978; Castles 1978; Stephens 1979; Korpi 1980; Alber 1982; Schmidt 1989; Muller 1989; Jackman 1980b; Keman 1984) and union participation (Furniss and Tilton 1977; Castles 1978; Stephens 1979; Korpi 1980; Muller 1989; Hicks, Swank and Ambuhl 1989; Keman 1984) are variables widely used by the family of nations approach to explain differences in national effort and both are somewhat linked. For reasons already mentioned, leftist-controlled corporate states will tend to support an expanded role for government and tend to side with labor's demands for union members. So, the eighth and ninth hypotheses state: *as the strength of leftist parties in a welfare state increases, national effort increases*, and *as union participation in a welfare state increases, national effort increases*.

This paper will test four socio-economic variables and five family of

nations variables against each other to see if levels of national effort are the result of built-in responses to a growing welfare state (socio-economic school), or more a product of theological and political ideology played out by policymakers (family of nations school). This is a very interesting research question, because it gets at the extent to which attitudes affect social policy. If attitudes are important, governments need to build coalitions between people with very different political and religious ideas about the poor and elderly in order for the Maastricht Treaty to work. But if national effort levels are determined by demographic and economic conditions, a very different strategy should be taken to successfully merge the European welfare states. Governments should focus on creating similar economic environments and taking innovative steps to deal with large elderly populations.

Research Design

Both the strategy and case selection for this paper are dictated by the question itself. Because there are a large number of independent variables to test in order to see which of the two schools better explains the variance in national effort among the Advanced Industrials, I will use a statistical design. Using data drawn from 17 of the OECD member countries, I will test the strength of the two sets of variables, those associated with the socio-economic approach and those with the family of nations school. The statistical design is the most appropriate for this paper because I need to test independent variables across many countries, and because it allows me to see which variables correlate most highly with my dependent variable while controlling for exogenous variables.

Since nine of my independent variables were interval level measures, (many of them percentages) I used bivariate correlations to determine the correlation coefficients for each of these variables. From these correlation coefficients, the direction, strength, and statistical significance of each of these independent variables were derived.'

Operationalization of Variables

I will be using the measure common to the literature today for the dependent variable: social welfare spending as a percentage of GDP (Schmidt 1982; Castles, Widmaier, and Wildenmann 1989). I will operationalize and measure Social Security and Welfare spending as a percentage of GDP from the data given in *OECD in Figures.- Statistics on the Member Countries, 1997* ed. Welfare and Social Security fall under a type of social welfare spending known as transfer payments, which money is transferred from the government directly to citizens in need. I did not choose to include Health, Education, Defense, Public Safety, or Housing expenditures because an entire study could be devoted to each of these categories, and they are not the core pro

grams we think of when we consider social spending. In some Advanced nations the benefits of these programs accrue to many middle and upper class citizens, especially in what Esping-Andersen (1993) terms the "social democratic" welfare regime. I am interested in the social spending programs that are geared towards the most vulnerable citizens: the impoverished and the aged. With the Maastricht Treaty and the slowing economics of many of the Advanced Industrials, it seems that Social Security and welfare are the forms of social spending most at risk of being cut back or phased out. Consequently, they are the most interesting to examine in a paper of this nature.

The socio-economic independent variables of GDP, tax receipts, unemployment levels, and elderly population will also be operationalized and measured by the standards set out in *OECD in Figures.- Statistics on the Member Countries, 1997*. I chose to measure per capita GDP using current Purchasing Power Parities, because they are designed to "eliminate differences in price levels between countries, [so that] given the same sum of money, when converted into different currencies at these rates, will buy the same basket of goods and services in all countries," (OECD 1997).

I chose to express levels of taxation in the form of total tax receipts, as a percentage of GDP, as the independent variable. I chose this because it appears the best overall indicator of the revenue each government has to work with. I avoided a certain kind such as personal income, corporate, or valueadded because different advanced nations stress different forms of taxation. This measure would account for all these differences in taxation.

The independent variables for the unemployed and the elderly were measured in a very straightforward manner. Unemployment levels were a percentage of the total labor force for both sexes, taken in 1995. The variable dealing with the number of elderly in each case was the percentage of the population aged 65 and over in 1995.

Just as it was fitting to use *OECD in Figures* as a source for demographic and social characteristics of each country, the World Values Survey 1990-1993 was a fitting source of data for the family of nations school. This survey was conducted through face-to-face interviews of randomly sampled adults, aged 18 and over, in the mass publics of 45 countries around the world. The questions they were asked related to the family of nations school:

Respondents were asked to rate the importance of ... politics and religion in their lives ... whether they shared the same attitudes towards religion, morality, politics ... political party and union membership, and left-right political self-placement" (World Values Study Group 1994).

Because the family of nations school believes that individual and especially collective religious and political attitudes largely determine public policy, this survey data is ideal for aggregating individual responses into percentages for each country. The survey questions used for this paper include questions

on religious denomination, frequency of church attendance, left-right ideological placement, and participation in a trade union.

To determine the percentage of practicing Catholics and Protestants in each country, I used the survey question to ask respondents which one of seven denominations he or she had ever been a member (including responses for other and no answer). These individual responses were aggregated by country to get percentages of Catholics and Protestants for each country. Because a respondent could have been a member of one of these denominations without that religion being an important factor in his or her life, I also used data from a survey question asking how often, on average, the respondent attends services. Then, I used the percentage from each country that went once a week or more to church, (apart from occasions such as weddings, funerals, and baptisms) because religion is likely to have a strong affect on people who attend services regularly. The church attendance variable is appropriate for religions such as Protestantism and Catholicism, as opposed to Hinduism, in which much of religious practice can happen at home.

Two other survey questions were used from the World Values Study to test the family of nations theory. One question asked the respondent if he or she belonged to a trade union and the other asked the respondent to place him or herself on a left-right spectrum ranging from 1 (far left) to 10 (far right). The dichotomous trade union variable was aggregated into the percentage in each country that answered yes. Similarly, the respondents that placed themselves as a "1" or "2" on the political spectrum were aggregated for each country. I chose only "1" and "2" respondents because leftist parties have traditionally been popular in Advanced Industrials and I wanted to get at the percentage of really strong leftist, rather than middle of the road leftists who may vote against social spending measures in times of economic downturn.

Data Analysis and Results

As Table I shows, the correlation coefficients for the socio-economic variables were all in the expected direction; GDP, tax receipts, unemployment, and elderly in the population were all positively correlated with national effort. However, GDP and unemployment both turned out to be statistically insignificant. It may be that in countries where unemployment is worst such as Spain, where unemployment is 23.8% they simply do not have the money to provide for a generous welfare state because that government's tax base is so eroded.

The strongest variables from the socio-economic school were tax levels and population percentage aged 65 and over. The variable of tax receipts as a percentage of GDP was correlated with national effort at a level of .6164 and was also significant at the .05 level. Thus, I can reject the null hypothesis that there is no relationship between national effort levels and taxation levels.

This is logical, considering that government expenditures are somewhat constrained by revenues. In countries such as Denmark and Sweden, citizens are likely to expect generous benefits to compensate for tax levels of 5 1.611,10 and 5 1.0%, respectively. Because so much of their money is going to government, they probably do not have much money left after taxes and paying for basic necessities. Also, it is logical that the citizens of these countries would expect more in return for all of the money they are paying in taxes.

The percentage of the population that is elderly, as posited by the socioeconomic school, is also very highly correlated at .4291 and significant at the A level. All of the Advanced Industrials except South Korea have declining 'dependency ratios'-that is, at the same time as their working population decreases, the elderly population and their demands increase. Thus, all of these countries face major challenges in reining in social welfare spending (Cochrane 1993). Thus, the size of the elderly population and level of taxation are important variables presented by the socio-economic school.

Table I
Socio-economic Variables
Correlation Coefficients with the Dependent Variable
(Social Spending as a Percentage of GDP)

GDP	Unemployed ^b	Elderly	Taxation Levels
.2664*	.0596*	.4291	.6164***
(.151)	(.410)	(.043)	(.005)
n=17	n=17	n=17	n=16

Source: OECD in Figures: *Statistics on the Member Countries*.

* statistically insignificant

**P=.05 level

***P=.005 level

a- per capita, measured in Purchasing Price Parities

b- percentage of population unemployed (1995, both sexes)

c- percentage of population aged 65 or older

d- total tax receipts as a percentage of GDP

Within the family of nations measure, there were also two variables which allowed rejection of the null hypothesis (see Table 2). All of the variables went in the hypothesized direction. As predicted, the union and Protestant measures were both positively correlated with national effort. The measures of Catholicism and national effort were insignificant. Religiosity was negatively correlated with national effort, but this is understandable consider

Table 2
Family of Nations Variables
Correlation Coefficients with the Dependent Variable
(Social Spending as a Percentage of GDP)

Religion	Leftist	Catholic'		ProtestantUnions,
-0.085 1	-.3388*	-.3364*		.6587** .6899***
(.373)	(.092)	(.093)	(.002)	(.001)
n=17	n=17	n=17	n=17	n=17

Source: World Values Study Group. WORLD VALUES SURVEY, 1981-1984 AND 1990= 1993 [Computer File]. ICPSR Version. Ann Arbor, MI: Institute for Social Researcher [producer] , 1994. Ann Arbor, ML Inter-university

Consortium for Political and Social Research [distributor], 1994.

*=statistically insignificant

** P=.005 level

***P=.001 level

a-Variable 147, church attendance.

b-Variable 248, self-placernoit on a left-right ideological scale. "1" left-" 10" right.

c-Variable 144, member of the Catholic denoinination.

d-Variable 144, member of any Protestant denomination. e-Variable 22, participation in a trade union.

ing that there were six "Catholic" countries (negatively correlated) as compared to five "Protestant" countries (positively correlated). Also, the religiosity variable was very weak, with a correlation coefficient of -.085 1. The correlation coefficient for the strength of the left was fairly strong in the predicted direction at -.3888 and significant at the . 10 level.'

As with the socio-economic school, the strongest independent variables are also significant. Unionization is strongly correlated with the dependent variable, at .6899 and significant at the .01 level, thus rejecting the null hypothesis. It is understandable that this variable is so highly correlated with national effort because highly participatory unions constitute a strong political force, and they can make demands to protect the welfare of their workers both in terms of wages and benefits. The Protestant variable was almost as strong a correlation at .6587 and significance at a level of .01. Thus, while the correlation coefficient for the Catholicism variable was not statistically significant, going by the strength and direction of the coefficients for Protestantism and Catholicism, the hypothesis that the Protestant family of nations will have higher levels of national effort seems to hold true. By emphasizing the redistribution of wealth and supporting women's equality through generous family policy, Protestant nations have higher levels of spending than Catholic nations. Hence, the Family of Nations school also has three influential independent variables: unionization, strength of left in society, and Protestantism.

Conclusion

It has been suggested that the model best suited to the complex nature of the welfare state may combine variables from more than one approach (Cutright 1965; Schmidt 1989; Pontusson 1995; Cameron 1978; Hicks, Swank, and Ambuhl 1989; Keman 1984). As Castles states, "Much of the best analysis in the fields variously described as comparative social and economic policy and political economy is returning in its emphasis ... to the earlier conceptions of the dynamic interaction of the economy, social structure and the polity"(Castles, Widmaier, and Wildenmann 1989). The strength of the two variables from each of the schools should be combined to create the best model for predicting levels of national effort.

What kind of model should be suggested to combine the variables of taxation levels, size of the elderly population, unionization levels, and the degree of Protestantism? Such a model would combine liberal policy tendencies, both ideologically and monetarily speaking, with a high demand for social services as indicated by the strong presence of unions and an aging population. In other words, certain religious and political predispositions towards a redistributive role for government, coupled with heavy demand for social services, will produce the highest levels of national effort, the "big spenders."

Just as combining the best variables from these two schools may help create the model which best explains levels of differentiation in national effort, it will be necessary to combine aspects of different welfare states to produce the best social charter for the European Union. Concern for the rights of minorities and women mixed with family responsibility, especially in caring for the elderly, are elements of "Catholic" and "Protestant" nations that can and should be combined by members of the European Union. To create a united European "family," such cooperation is imperative so that the social contract made between the governments and their peoples can remain unbroken.

Endnotes

The source, OECD *in Figures: Statistics on the Member Countries*, 1997 ed. only had the dependent variable data for 17 of the 29 countries.

² The structural political-school, which looks at the importance of government structure (parliamentary vs. presidential, unitary vs. federal states, etc.) is another important school in the welfare state literature. While this paper does not examine the government structures of each of the states, the Family of Nations hypothesis does support this school's position that "politics matters" in levels of social welfare spending. See Weaver, R. Kent and Bert A. Rockman, eds. 1993. *Do Institutions Matter?* Washington D.C.: The Brookings Institution. and Steinino, Sven, Kathleen Thelen, and Frank Longstreth, cds. 1992. *Structuring Politics*, New York: Cambridge University Press.

3 Esping-Andersen 1990 identifies three types of welfare regimes: Social- Democratic, Conservative, and Liberal. The Liberal has neither a dominant Catholic nor Protestant presence, and is characterized by low levels of national effort and stigmatization of welfare benefits. Countries posited to be Liberal regimes include: Britain, the United States, Japan, and Australia. I was planning to look at this regime type as well, but it is largely defined by the other two, and with an insignificant correlation coefficient for Catholicism, I could not compare the dependent variable for all three suggested regimes. When I have the dependent variable for all 29 countries, I can really test all three regime types.

4 For two of the "family of nations" variables, percent identified as Catholic and percent identified as Protestant, I went a few steps further. This was done in order to test the "family of nations" hypothesis that as religiosity in "Catholic" nations increased, that levels of national effort decreased, and that as religiosity in "Protestant" nations increased, levels of national effort increased. Therefore, I selected the cases in which the percentage for either Protestantism or Catholicism was over 50 percent, (five cases and six cases, respectively) and ran frequencies with the religiosity variable. This allowed me to rank from one to four the levels of religiosity within both the Catholic and Protestant families of nations. Then I ran crosstabs with this new variable (religiosity within homogenous nations) to test and see if the most religious Catholic nations had lower levels of national effort and if the most religious Protestant nations had higher levels of national effort. Since the Catholicism variable did not turn out to be significant, I could not conclude that the more Catholic the population of a welfare state, the lower the level of national effort. Only having the strong and significant Protestant variable, then, I could not start to compare to see if the three regime types correlated with the dependent variable and if increased religiosity affected the dependent variable.

5 Note that the survey scale is 1 "left" to 10 "right," so as this value decreases national effort is hypothesized to increase.

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