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The Direction and Scope of Social Policy Change: Regime-specific or Radical Shift towards Workfare?

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ABSTRACT *What is the direction and scope of social policy change? This article assesses the predictions and findings of two strands of literature: "mainstream" social policy analysis, which suggests the absence of radical change and the dependence of change on the type of welfare regime; and the regulation literature, which proposes a radical change from welfare towards workfare that does not hinge on the type of welfare regime. This article's systematic comparative analysis of 17 OECD countries between 1985 and 2002 provides mixed evidence for both accounts.*

Introduction

What is the direction and scope of social policy change? There is a widespread consensus in the literature about the socio-economic challenges contemporary welfare states face, such as ageing populations and the post-industrialization of labour markets, as well as about the pressures for change that these challenges bring about. However, there is a striking lack of consensus about the resultant direction and scope of social policy change (see Scharpf and Schmidt 2000, Pierson 2001, Gilbert 2002, Green-Pedersen and Haverland 2002, Myles and Quadagno 2002, Van Kersbergen 2002, Castles 2004, Starke 2006). Within the various literatures dealing with comparative social policy, at least two clashing views are discernable.

First, a key hypothesis in one body of work is the notion that the direction and scope of social policy change depend on the type of welfare state regime, that is the cluster of countries with a distinct political and policy configuration that produces a trajectory that is difficult to abandon (liberal, conservative, or social democratic; Esping-Andersen 1990, 1999, see Pierson 2001). Note that the notion of path dependence is not an argument against chance *per se*. As Pierson (2001: 415) stresses "the claim is not that path dependence 'freezes' existing arrangements in place.

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Change continues, but it is bounded change''. Theoretically, the argument of regime-specific change draws on insights from institutionalism. So a country's institutional make-up affects the specific challenges it has to cope with, such as poverty in liberal countries and ''welfare without work'' in conservative countries (see Esping-Andersen 1996a, Stephens 1996, Scharpf and Schmidt 2000). Additionally, this body of work suggests that the institutional configuration shapes or ''refracts'' (Kitschelt *et al.* 1999) the pressures a country faces. Partly as a consequence, the stickiness of institutions precludes ''radical'' change. Radical change, then, is change that is so great that it overhauls a country's institutional layout, like the transformation of a pay-as-you-go pension system into a (fully) funded system.

This article labels this first body of literature ''*mainstream*'' *social policy analysis*. The term ''mainstream'' does not entail any qualitative judgement, but is used because the hypotheses of regime-specific change and the absence of radical change often provide the yardstick against which scholars assess their findings. Specifically, researchers arguing against the path dependency and regime specificity of social policy change regularly take these hypotheses as their starting point (for example Cox 1998a, Lødemel and Trickey 2001, Gilbert 2002, Bannink and Hoogenboom 2007, but see Béland and Hansen 2000). Hence, and notwithstanding scholars fitting this ''mainstream'' tradition who acknowledge that social policy has changed in important respects such as being more severely subjected to the whims of the labour market (for example Stephens 1996, Swank 2001), the absence of radical change and the path dependent trajectory of change constitute key hypotheses of ''mainstream'' social policy analysis.

The second body of literature, the *regulation approach to political economy*, competes with the first as it hypothesizes that social policy has changed radically and irrespective of the type of welfare regime. Specifically, the argument is that, as a result of especially economic but also political and social pressures, there has been a shift from *welfare* towards *workfare* (Jessop 1999, 2002, Torfing 1999, Peck and Theodore 2000, 2001, Peck 2001). Somewhat different from common usage, the regulationists define welfare as the generalization of norms of mass consumption beyond male workers and the promotion of mass production that supports the (Fordist) growth dynamic,[1] and workfare as the subordination of social policy to the demands of labour market flexibility and the competitiveness of business. The welfare/workfare claim is a sub-hypothesis of this literature's proposition of a transformation from Keynesian welfare states (KWS) towards Schumpeterian workfare regimes (SWR).[2] As the SWR is (almost) the exact opposite of the KWS (see Jessop 2002: Tables 2.1 and 7.1), a shift from one to the other constitutes a radical change. Despite the different types of workfare regimes that most regulationists consider (Torfing 1999: 7, Peck 2001: 75–76, Jessop 2002: 260–267), these scholars hypothesize a welfare to workfare shift on the level of social policy in all regimes.

This article intends to solve this puzzle of competing theoretical predictions and findings by assessing comparatively who is right. The ''mainstream'' social policy analysts arguing that welfare state change is regime-specific and that radical change has been absent? Or the regulationists positing that irrespective of the type of welfare state, a radical shift from welfare towards workfare has come about? A comparative analysis of 17 advanced capitalist democracies[3] between 1985 and 2002 leads to mixed findings. In brief, the analysis shows that radical changes have occurred but an overall welfare to workfare shift has not. These findings contradict both literatures' predictions. However, the regime specificity of most changes verifies (partially) the social policy analysts' hypothesis. And the welfare to workfare shift found in the conservative regime and Denmark corroborates (partially) the regulationists' thesis.

This article's structure is as follows. Section two introduces the method used. Section three discusses the conceptual confusion around the term workfare and offers an operationalization that allows for systematic comparative analysis. Section four puts forward expectations of the shift towards workfare in the different welfare regimes. Section five studies comparatively if and to what extent a welfare to workfare shift has taken place and whether this change hinges on the type of welfare regime. Section six discusses the empirical findings. Section seven presents the conclusion.

The Method

To assess the predictions and findings of the two literatures, this article conducts a systematic comparative analysis. The reasons for such an analysis are several. First, although comparative projects and large-n studies have corroborated the "mainstream" social policy analysts' propositions (see Esping-Andersen 1996b, Scharpf and Schmidt 2000, Huber and Stephens 2001, Pierson 2001, Castles 2004), the exact direction and scope of social policy change remain debated (for example Taylor-Gooby 2004, Bruttel and Sol 2006). This article contributes to this debate by proposing an innovative conceptualization and operationalization of workfare that allows for examining comparatively and over a relatively large number of cases in which direction social policy is changing. Moreover, the individual components of this article's operationalization of workfare (activation, generosity, conditionality, and employment protection) provide additional information on the extent and shape of social policy change. Furthermore, the analysis contributes to the discussion on the path dependency of change by examining whether the changes found reveal a regime-specific pattern.

Another reason for conducting a comprehensive comparative assessment is that, contrary to the social policy analysts' claims, the regulationists' theoretical predictions are not yet tested empirically. Actually, the regulation literature lacks two things. First, it does not empirically test its welfare/workfare hypothesis and, second, it does not conduct systematic comparative analyses. Peck's (2001) edifying analysis of the political economy of workfare in the UK, Canada, and the US, for example, is – as Peck (2001: 7) states himself – no "formal and symmetrical piece of comparative analysis per se" since he does not undertake "comprehensively structured comparisons".

This article intends to fill the voids of both bodies of literature by empirically assessing the radical change and path dependency claims, using the most recent and apt data available. The analysis focuses on the percentage change between 1985 and 2002. What justifies this simple technique is that both the social policy analysts and the regulationists hold that these countries were *welfare* states in 1985. In 2002, however, this was still the case according to the former, whereas the countries had transformed into *workfare* regimes according to the latter.[4] That is, if a radical change from welfare to workfare did occur, it should show up between 1985 and 2002. Moreover, if social policy develops in a path dependent fashion, we should find such a pattern between these two years.

Workfare: Conceptualization and Operationalization

In the early 1970s, the term *workfare* originated in the United States to denote a specific programme in which participants were required to "work off" their welfare cheques.

Nowadays, the variety of workfare measures is wide and the meaning of workfare is broad and quite elastic. Consequently, there currently is substantial conceptual confusion around the term, mainly concerning how exactly it should be defined (see Grover and Stewart 1999: 76–77, Lødemel and Trickey 2001: 3–12, Peck 2001: 9–16, Barbier 2004: 49–51).

The definitions of workfare employed in the two strands of literature central to this study vary substantially. The regulationists usually adopt a wide definition of workfare, characterizing it as the subordination of social policy to the demands of labour market flexibility and to the competitiveness of business. Jessop (2002: 258), for example, speaks of "a major reorientation of social policy: away from redistributive concerns based on expanding welfare rights in a national state towards more productivist and cost-saving concerns" (see also Torfing 1999: 8). More narrowly, Peck (2001: 10) states that workfare in its essence involves "the imposition of a range of compulsory programmes and mandatory requirements for recipients with a view to *enforcing work while residualizing welfare*" (italics original). Instead of a programme, so the regulationists argue, workfare has become "the institutional codification of work-oriented welfare reform" (Peck 2001: 342).

"Mainstream" social policy analysts, contrarily, often see workfare as a programme. Specifically, these scholars usually define workfare narrowly as mandatory supply-side social policies that intend to increase labour force participation, enhance the flexibility of the labour market, and lower public social expenditures (see Scharpf and Schmidt 2000: 332, Kildal 2001: 3, Gray 2004: 160–161). Lødemel and Trickey (2001: 6), for example, define workfare as "programmes or schemes that require people to work in return for social assistance benefits". For them, the compulsion requirement is the key distinguishing feature of workfare (Lødemel and Trickey 2001: 7–8). Whereas this compulsion requirement is widely accepted among scholars studying workfare, Lødemel and Trickey's (2001) focus on "work" and, especially, "social assistance" is more controversial. Concentrating on *work* means that activation measures such as job training are excluded and these are measures that many researchers consider as possibly qualifying as workfare (Grover and Stewart 1999, Jessop 1999, Torfing 1999, Gray 2004, Bruttel and Sol 2006). Moreover, for quite a few researchers, programmes related to social insurance – instead of social assistance – can also come over as workfare (Peck and Theodore 2000, Peck 2001, Gray 2004, Bruttel and Sol 2006; see also Lødemel and Trickey 2001: 7–9).

For a number of reasons, this article adopts a wider conceptualization and operationalization of workfare that is not exclusively linked to social assistance.

First, the importance of social assistance within social security is relatively modest in the conservative and social democratic regimes. Whilst in the liberal regime on average almost a fifth (17.2%) of the population receives (means-tested) social assistance, this share is substantially lower (4.0% and 7.1%) in the conservative and social democratic regimes. Besides, whereas the liberal regime spends on average more than half (53.9%) of its total social security expenditure on social assistance, this is only 7.1 and 6.4 per cent in the conservative and social democratic regimes (Gough *et al.* 1997: 24). Furthermore, in some countries (such as Ireland, the UK, Australia, and New Zealand) social assistance benefits that are subject to the availability-for-work criterion, hence fitting the compulsion requirement of workfare, are called unemployment benefits (OECD 2003: 215, n.1). Such programmes would thus be excluded by concentrating on social assistance only. Finally, and related, for example the Netherlands stopped distinguishing between recipients of social assistance and unemployment assistance in its official statistics from 1995 onwards (OECD 2003: 217, n.27; see also Cox 1998b: 408–409), and also in other countries (such as Denmark and Germany) recent reforms have diminished the distinction between unemployment assistance and social assistance (Cox 1998b: 405, Kemmerling and Bruttel 2006).

Conceptualizing Workfare

For assessing the claim of a radical change from welfare towards workfare, we need concepts that relate (strongly) to workfare and that the two bodies of literatures share. Simply classifying every country with a workfare programme as a workfare regime would, for example, be problematic as this would undermine the regulationists' idea of a Schumpeterian workfare regime. So, Australia, Denmark, Germany, Finland, France, the Netherlands, New Zealand, Norway, Sweden, the UK, and the US all have workfare *programmes* (see Kildal 2001, Lødemel and Trickey 2001, Peck 2001, Waddan 2003, Gray 2004: 167–181; Aust and Arriba 2005; Bruttel and Sol 2006), but that does not automatically mean they are workfare *regimes*.

Notwithstanding the varying broadness in the definitions used, three characteristics of workfare show up in both bodies of literature: 1) the *obligation to work*, that is the need for benefit recipients to seek work actively, accept every job offer, and participate in eventual job chances enhancing activities; 2) the strive for *maximal labour participation*; and 3) *minimal income protection provisions*. Precisely, for a welfare to workfare shift, the obligation to work should increase, there should be a rise in measures that enhance labour participation, and income protection provisions should be lowered.

Four concepts are particularly apt for gauging such changes: activation, generosity, conditionality, and employment protection. Changes in the obligation to work show up in expenditures on active labour market programmes (ALMP), that is spending on public employment services and administration, labour market training, youth measures, subsidized employment, and measures for the disabled (OECD 2001: 22), because often – though not always – ALMP participants are forced to work (see OECD 2003: chap. 4, Bruttel and Sol 2006). Three categories can affect changes in labour participation. First, activation because one of the primary goals of ALMP is to increase labour participation. Second, generosity because lower payments can provide an incentive to take on a job instead of staying on welfare, consequently increasing labour participation. Third, and finally, employment protection, that is the regulations concerning hiring and firing, especially regular procedural inconveniences, difficulty of dismissal, and notice and severance pay (OECD 1999: 50, 2004: 110–111), as lower protection reduces the employers' costs for hiring workers and may tune down the duration of spells of unemployment by positively affecting the unemployment exit rates (OECD 2004: 99).[5] Changes in minimal income protection provisions can develop from two categories: generosity and conditionality. Lower generosity denotes *ceteris paribus* a drop in the importance of income protection provisions such as unemployment benefits. Similarly, stricter conditionality means that the hurdle for getting such provisions rises.

Measuring the Degree of Workfare

How can we measure activation, generosity, conditionality, and employment protection? This article measures the extent of *activation* by active spending per unemployed person relative to gross domestic product (GDP) per person employed. Active spending per unemployed person is the percentage of GDP spent on ALMP for each 1 per cent standardized unemployment. This is a priori a better measure of activation than the often used active spending as a share of GDP because spending on labour market programmes usually increases with the level of unemployment (OECD 2003: 193–194; see Armingeon 2005).[6] A truly active orientation, however, only arises if, in addition, active spending as a percentage of active and passive spending on labour market programmes combined is relatively high (cf. Armingeon 2005), with passive spending being expenditures on unemployment benefits and early retirement schemes (OECD 2001: 22).

This article measures *generosity* by two components of Esping-Andersen's decommodification index. First, by the net replacement rate, that is the ratio of the net unemployment insurance benefit to net income for an unmarried single person earning the average production worker wage (Scruggs and Allan 2006) and, second, by benefit duration, that is the number of weeks a benefit is payable for a fully insured 40 year old in unemployment or sickness. These data come from a recently publicized data set (Scruggs 2004; also see Scruggs and Allan 2006).

This article measures *conditionality* by two other components of the decommodification index, again taken from Scruggs' (2004) data set. First, by the number of qualifying weeks, that is the number of weeks of insurance or employment required to qualify for a benefit and, second, by the number of waiting days, that is the number of days before the benefit starts.

Finally, the article measures *employment protection* by an index of the strictness of employment protection legislation for temporary as well as for regular employment. The index derives from 14 items of employment protection legislation and ranges from 0 to 6, with a higher score indicating stronger protection, and reflects principally the legislative rules but incorporates some aspects of contractual provisions and judicial practices as well (OECD 1999: Annex 2B, 2004: Annex 2.A1).

To sum up, there are four concepts that relate (strongly) to the three characteristics of workfare identified (that is, the obligation to work, maximal labour participation, and minimal income protection): activation, generosity, conditionality, and employment protection. Although a different operationalization of workfare may produce different findings, the operationalization proposed here is the most appropriate one for assessing comparatively the predictions and findings of the "mainstream" social policy analysts and the regulationists. Specifically, these indicators capture the characteristics of workfare that the two strands of literature share and data are available over a (relatively) long period of time. Before delving into the empirics, the next section puts forward expectations about the welfare/ workfare changes in the different welfare regimes.

Expected Welfare/Workfare Changes in the Welfare Regimes

If social policy change is regime-specific, as the "mainstream" social policy analysts concur, there might be a welfare to workfare shift in some welfare regimes and none in others. Recall that such a finding would at least partly contradict the regulationists' hypothesis because these scholars propose that a welfare to workfare shift should be discernable in *all* welfare regimes. In order to assess whether the presence of a welfare to workfare shift is regime dependent, I compare the regimes' features in terms of work and welfare with the four concepts (that is, activation, generosity, conditionality, and employment protection) relating to the characteristics of workfare.

Both the existence of three welfare regimes (liberal, conservative, and social democratic) and the categorization of countries in these regimes have been heavily criticized (for recent critiques, see Goodin and Smitsman 2000, Bambra 2006, Scruggs and Allan 2006). Yet, in light of the findings of a recent study (Vis 2007), adopting the "classic" three-fold classification makes sense. Focusing on indicators similar to the ones concentrated on here (that is, activation, generosity, and employment protection), Vis (2007) shows that most of this article's countries have membership of the "expected" welfare state regime in at least one of the two years, and half of the countries even in both years.

Let us now turn to the welfare regimes' characteristics. Features of the *liberal regime* are residual social policy covering only the most basic risks, high levels of employment, the absence of a focus on activation, and strongly deregulated labour markets. Most of this regime's policy heritages fit the characteristics of workfare identified above (see Pierson 2001: 432–440). The level of generosity is low, the conditions attached to social policies are strict, and the level of employment protection is low. In fact, the liberal regime would constitute a workfare regime if it were not for the near absence of an emphasis on activation. Thus, if policy follows a path dependent trajectory, the liberal regime likely displays a welfare to workfare shift because of this regime's close link with the characteristics of workfare.

Attributes of the *conservative regime* are its relatively generous, predominantly insurance-based social policy aiming mainly at the male breadwinner, the – consequent – discrepancy between "insiders" and "outsiders" on the labour market, the high welfare tolls and low employment levels, the traditionally low importance of activation, and the strongly regulated labour markets. Contrary to the liberal regime, the conservative regime's traditional policies do not fit the characteristics of workfare (see Pierson 2001: 445–454). The level of generosity in the conservative regime is high and the conditions affixed are relatively moderate. Activation is hardly stressed and the level of employment protection is high. If policy is path dependent, there should be no welfare to workfare shift in this regime.

Features of the *social democratic regime*, finally, are its very generous, largely universal social policy, its high levels of employment, the substantial use of active labour market programmes and, with the exception of Denmark, the relatively strongly regulated labour markets. Where the liberal regime clearly corresponds to the characteristics of workfare and the conservative regime clearly does not, the social democratic regime holds an intermediate position (see Pierson 2001: 439–445). Contrary to the features of workfare, social policy in the social democratic regime is generous and the conditions attached are relatively low. Still, the obligatory character of most of the activation programmes suggests a focus on conditionality that fits workfare. The same goes for the high levels of employment that hint at an obligation to work and for the deep emphasis on activation. However, the high level of employment protection does not match workfare. Consequently, if policy is path dependent, there should be no overall trend from welfare towards workfare. Still, the extent of a welfare to workfare shift is probably higher than in the conservative regime.

In sum, based on the welfare state regimes' characteristics and their link with the features of workfare, I expect the largest welfare to workfare shift in the liberal regime, followed by no clear shift in the social democratic regime, and no shift at all in the conservative regime.

Shifting towards Workfare?

Recall that for a welfare to workfare shift to take place, four conditions should be met. Activation should increase, generosity should decline, conditionality should rise, and employment protection should relax. Furthermore, for a development towards activation, both active expenditure per person unemployed and ALMP spending as a share of total labour market programmes' expenditures should increase. For lower generosity, the net replacement rates should be tuned down, benefit duration should be lowered, or both. For higher conditionality, the number of qualifying weeks and/or waiting days should increase. And for relaxed employment protection, the regulations concerning hiring and firing should be loosened, and/or dismissal should be easier, and/or notice and severance pay should decline. This section assesses whether such changes took place and whether these depended on the type of welfare regime, discussing the four conditions subsequently.

Activation

The cross-national and cross-regime variation in both active spending per unemployed and as a share of labour market expenditure is substantial (see Table 1). The *conservative regime* displays a clear pattern of increasing activation that is in harmony with a trend towards workfare. On average, active spending per unemployed rises by 122 per cent and active spending as a share of total spending increases by 47 per cent. In fact, Switzerland is the only conservative country where we see clear de-activation, that is a lowering of both measures.

Table 1. Spending on active labour market programmes

	ALMP spending per unemployed			**ALMP spending in total spending**		
	1985	**2002**	**Increase**	**1985**	**2002**	**Increase**
Liberal regime						
UK	7	7	0	26	50	92
Ireland	9	31	244	30	62	107
US	4	2	−50	34	19	−44
Canada	6	6	0	25	34	36
Australia	5	7	40	25	32	28
New Zealand	21	10	−52	50	39	−22
Average[a]	*9*	*11*	*22*	*32*	*39*	*22*
	(*9*)	(*6*)	(*−33*)			
Conservative regime						
Austria	6	13	117	22	30	36
Belgium	12	18	50	28	34	21
France	7	14	100	22	40	82
Germany	8	14	75	32	36	13
Italy	3	5	67	37	74	100
the Netherlands	10	59	490	28	52	86
Switzerland	19	18	−5	42	40	−5
Average	*9*	*20*	*122*	*30*	*44*	*47*
Social democratic regime						
Denmark	19	35	84	23	34	48
Finland	18	11	−39	41	33	−20
Norway	23	22	−4	56	62	11
Sweden	68	27	−60	71	57	−20
Average	*32*	*24*	*−25*	*48*	*47*	*−2*

[a]Average without Ireland between brackets.
Increase in percentages. Active spending per unemployed is computed as expenditures on ALMP × 100 divided by the standardized unemployment rate (cf. Armingeon 2005). Active spending in total spending is calculated as active expenditures as a percentage of total expenditures on labour market programmes. Data for Italy, 1995 instead of 1985; data for Australia and Ireland, 2001 instead of 2002; data for Portugal, 2000 instead of 2002; data ALMP in total spending for Canada, 1986 instead of 1985.
Source: Data set in Armingeon (2005 [standardized unemployment rates: OECD Labour Market Statistics; ALMP expenditures: OECD 2004 Social Expenditure Database]); increase and averages, author's calculations.

The trend in the *social democratic regime* is also clear. Here activation diminishes, which is in dissonance with a shift towards workfare. More precisely, average active spending per unemployed decreases by 25 per cent and active spending in total spending falls by 2 per cent. Looking at the individual countries, we see that only Denmark moves towards higher activation – and thus workfare – by raising active spending per unemployed as well as active spending as a share of total spending. Finland and Sweden, contrarily, are cases of de-activation as both types of active spending fall. Norway, finally, also does not display a trend towards workfare as this country slightly lowers active spending per unemployed whilst it increases active spending in total spending.

The liberal regime's pattern regarding activation is less clear. On average, the trend is towards activation with both measures increasing by 22 per cent. However, excluding the huge rise in the Irish ALMP spending per unemployed of almost 250 per cent leads to a fall in the liberal regime's average to minus 33 per cent. Two liberal countries evidently display activation (Ireland and Australia), two de-activation (the US and New Zealand), and the other two (the UK and Canada) show no change in active spending per unemployed and an increase in active spending in total spending.

All in all, a pattern of (further) activation emerges in all the countries of the conservative welfare regime (except Switzerland), in Denmark, Ireland, and Australia. Conversely, Switzerland, Finland, Sweden, the US, and New Zealand display de-activation. Furthermore, Norway shows lower active spending per unemployed but higher active spending in total spending, and the UK and Canada portray no change in active spending per unemployed but higher spending in total spending. As activation should increase for a welfare to workfare shift, these findings provide preliminary evidence for the inaccuracy of the regulationists' hypothesis.

Generosity

For a welfare to workfare shift, the second category (generosity) should decline between 1985 and 2002. Table 2 presents data on the first generosity indicator, the net replacement rate of unemployment insurance (UI) and sick pay, which indeed shows a downward pattern. Ignoring the huge increase in the Italian UI replacement rate of 2,100 per cent – caused by the increase from an extremely low replacement rate of 2 in 1985, indicating the (almost) absence of unemployment insurance, to a rate of 44 in 2002 – the average replacement rate falls in all regimes. The same applies to most individual countries. In fact, only four countries deviate from that pattern: Italy in which both UI and sick pay rates rise (the latter by 1% only), Austria in which the sick pay rate increases, and France and Norway where the replacement rates do not change. On average, the liberal regime's replacement rates display the largest change: minus 18 per cent for UI and minus 26 per cent for sick pay. The average change is smallest in the conservative regime. Disregarding Italy again, the average conservative UI rate falls by 1 per cent and the sick pay rate by 2 per cent. The social democratic regime holds an intermediate position with, on average, minus 11 per cent for both UI and sick pay benefits. So, and different from the data on activation, the changes in replacement rates support the regulationists' hypothesis of a welfare to workfare shift for most countries. And despite the differences in the extent of changes in the three regimes, these changes do take place irrespective of the type of welfare regime – corroborating also the second part of the regulationists' thesis.

Benefit duration, the second generosity indicator, displays no downward trend that would be needed for a welfare to workfare shift. Specifically, seven countries do not change their benefit duration between 1985 and 2002 (Ireland, the US, Australia, New Zealand, Germany, Italy, and Sweden). Four countries at least double the duration of their unemployment benefits (Belgium, Finland, the Netherlands, and Norway). One country increases its sick pay duration (the UK). Four countries reduce their unemployment benefit duration somewhat or substantially (Canada,

Table 2. Net replacement rates

	Unemployment insurance			Sick pay		
	1985	**2002**	**Increase**	**1985**	**2002**	**Increase**
Liberal regime						
UK	25	19	−24	29	22	−24
Ireland	49	29	−41	49	29	−41
US[a]	64	58	−9	–	–	–
Canada	66	60	−9	66	60	−9
Australia	27	26	−4	31	21	−32
New Zealand	34	26	−24	40	26	−35
Average	*44*	*36*	*−18*	*43*	*32*	*−26*
Conservative regime						
Austria	58	55	−5	76	79	4
Belgium	71	66	−7	87	85	−2
France	71	70	−1	62	62	0
Germany	63	60	−5	100	92	−8
Italy	2	44	2100	76	77	1
the Netherlands	86	78	−9	84	78	−7
Switzerland	73	72	−1	82	79	−4
Average[b]	*61*	*64*	*5*	*81*	*79*	*−2*
	(70)	*(69)*	*(−1)*			
Social democratic regime						
Denmark	74	59	−19	74	59	−20
Finland	64	57	−11	87	72	−17
Norway	67	65	−3	100	100	0
Sweden	81	75	−7	92	82	−11
Average	*72*	*64*	*−11*	*88*	*78*	*−11*

[a]The US has no sickness programme.
[b]Average without Italy between brackets.
Increase in percentages. The replacement rate is the ratio of net unemployment insurance benefit to net income for an unmarried single person earning the average production worker (APW) wage.
Source: Scruggs (2004); increase and averages, author's calculations.

Denmark, Switzerland, and the UK). The same goes for three countries in case of sick pay duration (Austria, Denmark, and France).

Combining the two generosity indicators, the pattern in most countries is towards lower generosity, supporting the presence of a welfare to workfare shift (all countries of the liberal regime, Austria, France, Germany, Switzerland, Denmark, and Sweden, that is if we include those countries that exhibit a lowering of one indicator and no change on the other). Conversely, four countries show a rise on one indicator and a fall on the other, conflicting with a welfare to workfare shift.

Conditionality

For a welfare to workfare shift, the third category (conditionality) should show a trend towards greater strictness between 1985 and 2002. The qualifying period, the first conditionality indicator, fails to demonstrate such an upward pattern. Actually, only three countries tighten their conditions by increasing the qualifying period (Belgium, the Netherlands, and Finland; all for UI). Four countries, contrarily, relax the conditions by lowering the qualifying period for UI (Ireland, Canada, Germany, and Switzerland). The UK increases the qualifying period of UI and lowers it for sick pay. Most countries display no change at all (the US, Australia, New Zealand, Austria, France, Italy, Denmark, Norway, and Sweden). Nonetheless, the regime averages suggest some patterns. The changes in the liberal regime are towards fewer conditions, that is lower qualifying periods. The only change in the social democratic regime, however, is an increase in the qualifying period. Finally, the changes in the conservative regime entail both increasing qualifying periods and decreasing ones.

For the number of waiting days, the second conditionality indicator, only a few countries display any change between 1985 and 2002. Two countries show a trend towards stricter conditions on this category: Switzerland, increasing the number of waiting days for UI, and New Zealand, increasing sick pay waiting days. In six countries, conditions become less strict (Finland and Italy lower their UI waiting days; Denmark, the Netherlands, and the UK lower their sick pay waiting days; and Ireland lowers both). Most countries, however, do not change their waiting days (the US, Canada, Australia, Austria, Belgium, France, Germany, Norway, and Sweden).

All in all, most countries do not display a trend towards stricter conditions. The qualifying period increases in four countries only and the number of waiting days in two. Some countries lower their qualifying period and number of waiting days, meaning fewer conditions. Most countries, however, do not change the qualifying period and the number of waiting days between 1985 and 2002. This latter finding fails to corroborate the regulationists' hypothesis.

Employment Protection

Finally, for a welfare to workfare shift, employment protection (the fourth category) should be reduced. Table 3 presents data on employment protection for both regular and temporary employment for the late 1980s and 2003,[7] which display a distinct cross-regime pattern. On average, the liberal regime's employment protection becomes stricter both for regular and, especially, temporary employment (respectively plus 30% and 50%). All the liberal countries demonstrating any change (the UK, Ireland, Canada, Australia, and New Zealand) show this increase. The social democratic regime, contrarily, on average reduces employment protection for both regular and, particularly, temporary employment (respectively minus 8% and 33%). Also the conservative regime lowers average employment protection for temporary employment (minus 35%), whilst the average employment protection for regular employment remains the same. Here, however, some countries increase protection between the late 1980s and 2003 (France and Germany for regular employment; Switzerland for temporary employment).

Overall, and in line with a welfare to workfare shift, employment protection relaxes in all countries of the social democratic and conservative regimes (except Switzerland). In the liberal regime, conversely, employment protection increases.

Table 3. Strictness of employment protection regulation

	Regular employment			**Temporary employment**		
	Late 1980s	**2003**	**Increase**	**Late 1980s**	**2003**	**Increase**
Liberal regime						
UK	0.9	1.2	33	0.3	0.4	33
Ireland	1.6	1.6	0	0.3	0.6	100
US	0.2	0.2	0	0.3	0.3	0
Canada	0.9	1.3	44	0.3	0.3	0
Australia	1.0	1.5	50	0.9	0.9	0
New Zealand	1.4	1.7	21	0.4	1.3	225
Average	*1.0*	*1.3*	*30*	*0.4*	*0.6*	*50*
Conservative regime						
Austria	2.9	2.4	−17	1.8	1.5	−17
Belgium	1.7	1.7	0	4.6	2.6	−43
France	2.3	2.5	9	3.1	3.6	16
Germany	2.6	2.7	4	3.8	1.8	−53
Italy	1.8	1.8	0	5.4	2.1	−61
the Netherlands	3.1	3.1	0	2.4	1.2	−50
Switzerland	1.2	1.2	0	0.9	1.1	22
Average	*2.2*	*2.2*	*0*	*3.1*	*2.0*	*−35*
Social democratic regime						
Denmark	1.5	1.5	0	2.6	1.4	−46
Finland	2.8	2.2	−21	1.9	1.9	0
Norway	2.3	2.3	0	3.5	2.9	−17
Sweden	2.9	2.9	0	4.1	1.6	−61
Average	*2.4*	*2.2*	*−8*	*3.0*	*2.0*	*−33*

Increase in percentages. The scores rank from 0 tot 6, a higher score indicating stricter regulation. For calculation of these scores, see OECD (1999: Annex 2B) and OECD (2004: Annex 2.A1). Data for New Zealand, late 1990s instead of late 1980s.
Source: OECD (2004: Table 2.A2.4); increase and averages, author's calculations.

Discussion of Results

This leaves us with the question, who is right? The "mainstream" comparative social policy analysts holding that radical social policy change is absent and that the changes that do take place are regime-specific? Or the regulationists arguing that there is a radical shift from welfare towards workfare that takes place irrespective of the type of welfare state regime? This article's findings indicate that the situation is most aptly described as a "tie".

If we take the predictions from the social policy literature and regulation literature in the strictest sense, both are off-beam. The "mainstream" social policy scholars' predictions are inadequate because substantial changes occur that, certainly when combined, are radical as they break with the established trajectory. A good example thereof is the trend towards greater employment protection in the liberal regime. The regulationists' predictions are wrong because no single country meets all four criteria for a radical change towards workfare (higher activation, lower generosity, stricter conditionality, and relaxed employment protection). Since all criteria are essential for such a change, this finding denotes that such a welfare to workfare shift failed to come about.

However, adopting a leaner criterion might be justifiable as for all welfare regimes findings are incongruous for the indicator conditionality. In the social democratic regime, for example, the average qualifying period increases – in line with a welfare to workfare shift – but the number of waiting days decreases – contrary to a welfare to workfare shift. Does a shift towards workfare come about if the conditionality category is disregarded? Yes, to a certain extent it does. The conservative regime on average displays a welfare to workfare shift as activation, generosity, and employment protection all have the "correct" sign. In addition, in all conservative countries save Switzerland all criteria but one at the most are in the right direction, suggesting the presence of a welfare to workfare shift in this regime. This conclusion does not apply to the liberal and social democratic regimes. Here, one indicator exhibits an "incorrect" sign, respectively employment protection and activation. The within-regime variation in these regimes is larger than in the conservative regime. In the social democratic regime, Denmark displays a welfare–workfare shift, Sweden would have if it were not for the lower activation, and Finland and Norway are not shifting as they have the wrong sign on two categories. Half of the countries of the liberal regime (the UK, Ireland, and Australia) have one category with an incorrect sign and the other half (the US, Canada, and New Zealand) have two. These findings provide a weak basis to speak of an *overall* trend towards workfare.

This result brings me to the second element in the predictions of the two approaches: the extent to which changes are regime-specific. Are the comparative social policy scholars right and are the changes path dependent? If the trajectory is path dependent, the liberal regime should display the strongest shift towards workfare, followed by the social democratic regime and, in the last position, no change in the conservative regime (see above). Before examining whether the data demonstrate this pattern, let me mention one caveat. As the empirical analysis focuses on changes, countries and regimes corresponding most with the characteristics of workfare to begin with (like the liberal regime) may be contended to be the least likely candidates for a welfare to workfare shift. However, I have taken this possible problem into account by primarily concentrating on the direction of change (that is, on the indicators' signs), whilst considering the degree of change only of secondary importance.

The empirical analysis reveals that the actual changes fail to support the hypotheses: the conservative regime demonstrates a welfare to workfare shift, the social democratic regime holds the intermediate position as only Denmark moves from welfare to workfare, and the liberal regime corresponds least with a welfare to workfare shift. This interesting finding solicits further investigation. It might, for example, mean that social policies are converging. However, whereas the data on activation and employment protection (see Tables 1 and 3) hint in that direction, those on generosity (see Table 2) do not.

Concerning the regime specificity of changes, the "mainstream" social policy analysts are right. The presence of a welfare to workfare shift characterizes the conservative regime (and Denmark); the rise of employment protection typifies the liberal regime (and Switzerland); the presence of changes on (almost) all indictors characterizes the social democratic regime; and lower activation (one or both indicators) is specific to the liberal and social democratic regimes (and Switzerland).

Conclusion

This article has used the predictions and findings of so-called "mainstream" social policy analysis and the regulation literature to examine the direction and scope of social policy change in 17 advanced capitalist democracies between 1985 and 2002. Specifically, the article put forward an innovative operationalization of workfare (based on the indicators activation, generosity, conditionality, and employment protection) that allowed for assessing systematically the analytical predictions of each strand of literature. The empirical analysis presented mixed findings. Contrary to the social policy analysts' predictions, radical changes occurred and those changes did not follow a clear path dependent trajectory. Contrary to the regulationists' predictions, there was no overall trend from welfare towards workfare irrespective of the type of welfare regime. However, the regime-specific pattern of changes verified (partially) the social policy analysts' hypotheses, and the welfare to workfare shift in the conservative regime and in Denmark corroborated (partially) the regulationists' predictions.

What can we take from this article's findings regarding the wider debate on welfare state change? What do the results suggest with respect to the welfare state's alleged "hollowing out" (see Cox 1998a, Gilbert 2002), "retrenchment" (see Korpi and Palme 2003, Allan and Scruggs 2004), or "persistency" (see Pierson 1996, 2001, Huber and Stephens 2001, Castles 2004)?

In brief, the answer is that the findings presented here fail to substantiate any of these assertions fully. At odds with the idea of a hollowed out or retrenched welfare state are the on average increase in active spending per unemployed in the liberal and conservative (but not social democratic) regimes, the fact that most countries either expand the duration of unemployment and/or sickness benefits or leave them unaltered, the absence of higher qualifying periods and waiting days for these benefits in most countries, and the improvement of employment protection in the liberal regime. These outcomes suggest instead that the welfare state persists. However, there are indications of welfare state cutback or retrenchment, particularly the lowering of the replacement rates of unemployment insurance and sick pay that occurred in all countries under study. The relaxation of employment protection in most countries of the conservative and social democratic regimes, and the reduced emphasis on activation in the latter, suggest that policy changes may be more than "bounded change" – as the advocates of path dependency would have it. These findings substantiate the notion prominently present in the comparative social policy literature that how to conceptualize and operationalize the dependent variable is crucially important (see Green-Pedersen 2004, Kühner 2007).

The idea of a hollowed out welfare state does often not, or not only, refer to less spending on welfare state arrangements. Instead, the focus is regularly (also) on the *quality* of the welfare state. What, for example, is the effect of social policy changes on the rights and responsibilities of citizens? In this respect, workfare programmes are particularly interesting. Although this article demonstrated that welfare states have not univocally transformed into workfare regimes, workfare *programmes* are adopted (almost) everywhere. Given the characteristics of such programmes (the compulsory nature, the stress on labour participation, and the striving for minimal income protection provisions), this may very well be a change for the worse.

The debate about the virtues and vices of workfare programmes is still unresolved. Programmes of the so-called Work First type that aim to place participants in a job as quickly as possible can be a stepping-stone helping individuals into employment, that is when the demand on the labour market is sufficiently high (Peck and Theodore 2000, Bruttel and Sol 2006: 85). This can be an improvement (but see Malmberg-Heimomen and Vuori 2005). However, if workfare programmes simply force people to take on jobs without offering anything in return (like training or skill development), they can change the rights and obligations accruing to members of society for the worse – in that sense "hollowing out" the welfare state (see Cox 1998a, Gilbert 2002, Dwyer 2004). Such hollowing out does not necessarily take place when programmes follow the so-called Human Capital Development model that focuses on the development of social attitudes and marketable skills that enhance individuals' ability to find a job (Lødemel and Trickey 2001, Peck and Theodore 2001, Bruttel and Sol 2006: 70). Generally speaking, the workfare programmes in the Anglo-Saxon countries are Work First ones, whereas the programmes in the countries in the conservative and social democratic regimes are usually of the Human Capital Development type (but see Bruttel and Sol 2006). This suggests that the adoption of workfare programmes "hollows out" further the – already quite lean – liberal welfare states, whilst the workfare programmes in the conservative and social democratic regimes do not have this effect.

This article's findings bring forth all kind of questions that solicit further study. How, for example, can we explain the changes found in the individual countries and welfare regimes, as well as the substantial cross-national and cross-regime variation in the pattern of changes? This study demonstrated that confronting the predictions and findings of the "mainstream" social policy literature and the regulation approach provides a fruitful first step in this endeavour.

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Notes

1. For a conceptualization of welfare rooted in culture, see Bartram (2005).
2. Both the KWS and the SWR are seen as regulatory structures for managing the capital/labour relationship. The KWS aims for full employment and the generalization of mass consumption and mass production and therefore maintains a large social security programme. The SWR, contrarily, strives to stimulate innovation and flexibility and to subordinate social policy to the demands put forward by the new post industrialist system such as the necessity to improve competitiveness.
3. The cases are the United Kingdom, Ireland, the United States, Canada, Australia, New Zealand (liberal regime); Austria, Belgium, France, Germany, Italy, the Netherlands, Switzerland (conservative regime); Denmark, Finland, Norway, Sweden (social democratic regime). These countries are selected because the literature dealing with workfare focuses on these countries (and not, for example, the Southern European countries).
4. The years 1985 and 2002 are the earliest and latest years for which data are available for all components of the workfare measure.

5. However, leaner employment protection means lower job security, which may trigger some people to prefer welfare over work (see Regalia 2003: 180–181).
6. Thanks to Klaus Armingeon for kindly providing these data.
7. Due to data availability, I measure employment protection for the late 1980s and 2003 instead of for 1985 and 2002. This causes no problems for the analysis because the regulationists consider the welfare to workfare shift to be a fairly recent phenomenon.

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