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European Welfare States Beyond Neoliberalism: Toward the Social Investment State

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Students of welfare state politics
would probably agree that, on balance,
a large number of veto players
tends to inhibit not only the expansion of benefits
but also their radical curtailment.
(Starke, 2006: 115)

After the golden age of welfare state development in Europe, the glorious thirty years from 1945 to 1974, perceptions changed and the welfare state was interpreted to be in crisis. One solution to the crisis was a neo-liberal approach emphasizing privatization and retrenchment. And at least rhetorically this perspective gained ground during the 1980s in Northwestern Europe and during the 1990s in the newly emerging market economies of Central and Eastern Europe. However, on the whole, social science literature has been more concerned about trying to explain welfare state resilience to change than identifying retrenchment even if parts of the literature do argue for such a perspective. This seeming contradiction within the scholarly community calls for a more precise definition of all three import concepts: What should be understood by neo-liberal reform or a neo-liberal approach? Which welfare policies are in question? And what parts of Europe are being investigated? Furthermore, the time perspective is crucial.

From the perspective of the late 2000s this paper argues first that neo-liberalism in the form of the so-called Washington consensus is no longer promoted by international organizations. Social policies are no longer regarded as a burden on economies, but rather as investment in human capital. Hence, we are now beyond neo-liberalism. Secondly, the widespread welfare reforms in Europe must be distinguished according to welfare regime. Thus, the paper discusses welfare reform within five different trajectories: former state-socialist states, Continental Europe, Atlantic Europe, Southern Europe and Scandinavia. Although the number and demarcations of welfare regimes are contested (for an excellent overview see Powell and Barrientos, 2008) it is a widespread perspective and a good tool to order European welfare states. Hence, I agree with Francis Castles and Herbert Obinger (2008: 321) when they write: "Our main conclusions are that country clustering is, if anything, more pronounced than in the *past, that it is, in large part, structurally determined and that the EU now contains a quite distinct post-Communist family of nations."*

A superficial overview of spending on social protection in both relative and absolute terms from 1980 (1990 in Eastern Europe) to 2005 reveals no signs of retrenchment in any regime. But such summary indicators may mask a different distributional profile of benefits and an increase in risks and coverage. Therefore, the remainder of the paper discusses in more detail particular welfare reforms within each of the five welfare regimes. It is concluded that problems of welfare state development differ within the different regimes, but a strong commitment to welfare can be identified everywhere. However, within a bifurcated system where the middle class enjoys generous protection, the marginalized are subjected to increased obligations and reduced entitlements.

Keywords: *Welfare Reform, Europe, Welfare State, Social Policy, Social Investment State*

Introduction

Western European theories traditionally
have stressed that the public interest
is better served when providing welfare services
is accepted as a state responsibility.
However, this has become somewhat muddy
as a result of the neoliberal tendencies of the 1980s
(Bordas, 2001: 226)

In Western Europe the welfare state was part of the post WW II social settlement during the so-called *trente glorieuse*, but with the oil crises during the 1970s it became contested, and in 1981 OECD declared the welfare state to be in crisis. This was the beginning of a neoliberal turn in politics across the globe. Looking back at its development from 2010, a very complex picture emerges from the social science literature. Crudely, political economics has had a tendency to view the changes within post-industrial welfare states as indeed going down a liberal road of retrenchment, privatization and marketization. Thus, Jasmin Lorch (2007) entitled a paper 'the neoliberal retreat of the welfare state in Europe and the developing world' and began by stating that, "[d]ue to budget constraints most European countries have been experiencing some form of the retreat of the welfare state since the early 80s. Partly in reaction to this neo-liberal tendency…" (See also Harvey, 2005; Ryner, 2008). Differently, part of the political science literature has pointed to welfare states' resilience to change (Esping-Andersen, 1996; Pierson, 1994; 1996; Starke, 2006). Yet, again the majority of comparative, institutional, and sociologically oriented literature has pointed to various degrees of change such as the recalibrating, recasting, renewing or reforming of welfare states, but concluding that these changes have led to a survival of the welfare state (Bolukbasi, 2009; Clasen, 2000; Clegg, 2007; Drahoukoupil, 2007; Ferrera and Rhodes, 2000a; Ferrera, Hemerijck and Rhodes, 2000; Kuhnle and Alestalo, 2000; Leibfried and Obinger, 2000).

How is it possible for social scientists to reach such opposite conclusions? In order to clarify and qualify the discussion it is important to be more precise about time, space and content. Following the reactions to the first oil crisis of the mid 1970s ending the 'golden years' the advice given to governments from international organizations such as the OECD was indeed of a neo-liberal bent (OECD, 1981). Some governments, at least judged by their rhetoric, did also speak against the welfare state—particularly conservative ones like those of

Margaret Thatcher in the UK and Ronald Reagan in the USA. Hence, the 1980s in Western Europe and the 1990s in Eastern Europe can, at least to some extent, be characterized as neoliberal. However, since around 1997 the Washington-based international organizations have stopped arguing for a neoliberal agenda, and are now pursuing a social investment perspective (Jenson, 2010). This perspective is still productivist, but certainly not neoliberal, as they are arguing for enhanced public intervention in health care, education and basic social security.

It is thus important to be precise about what point in time we are observing and also where. Europe consists of (at least) five different welfare regimes clustered geographically, and with different trajectories of welfare reform and welfare retrenchment. The most clear cut neoliberal case is the East European transformation from state socialism to capitalism beginning after the fall of the Berlin Wall in November 1989; and the Atlantic experience (UK and Ireland) was a contender for a neoliberal turn, even if many observers when looking back at the 1980s had problems actually identifying such a change. Viewing the development in Southern Europe following the defeat of military dictatorship and the installation of democratic rule in the 1970s, we saw a rapid expansion of welfare entitlements, including the creation of public, universal health care systems. In Continental Northwestern Europe the frozen landscape of the 1990s may have to some extent been succeeded by some retrenchment and marketization during the 2000s. Finally, there have been changes to welfare provision in Scandinavia, but nothing that would qualify as a neoliberal turn. Below, a periodization will be applied which considers the 1980s and 1990s as a period of uncertainty, and the 2000s as a period marking the turn toward a new welfare state settlement labeled the "social investment" state.

Furthermore, disagreement about the developments made may stem from comparing apples with oranges. It is very likely that reforms of social assistance and unemployment schemes have taken another direction than that of family policy; and pension reforms may look very different from health care reforms. Thus, it is important to be precise about which welfare sectors are being analyzed and compared over time and across space.

These considerations taken together make it a formidable task to assess welfare reform in Europe with an eye toward neoliberalism. Ideally the development over three decades in five welfare regimes with regard to 10 or more specific social policy areas should be analyzed. Finally, the whole exercise hinges on which definition of neoliberalism is applied. Obviously, the ambition of this paper is more limited. It provides results from a selective—but certainly not arbitrary—reading of the literature on welfare reform with an emphasis on the most recent development and most important changes, considering policy areas within the regimes. The reasoning is very much in line with what is expressed in the paper by Linda Weiss on this issue where globalization is interpreted as demanding rather than discouraging state intervention (Weiss, 2009). It will be concluded that problems of welfare state development are different within the different regimes, but that everywhere there can be identified a strong commitment to welfare within a new welfare settlement, which is identified as the social investment state. However, within a bifurcated system where the middle class enjoys generous protection, the marginalized are subjected to increased obligations and reduced entitlements.

Beyond Neoliberalism?

Many have associated neoliberalism with the so-called Washington Consensus as summed up by the Center for International Development at Harvard University (2007). The phrase 'Washington Consensus' is today a very popular and often pilloried term in debates about trade and development. It is often seen as synonymous with 'neo-liberalism' and 'globalization.' As the phrase's originator, John Williamson, says:

> Audiences the world over seem to believe that this signifies a set of neo-liberal policies that have been imposed on hapless countries by the Washington-based international financial institutions and have led them to crisis and misery. There are people who cannot utter the term without foaming at the mouth! (Williamson, 2002)

Initially the Washington Consensus referred to is as "the lowest common denominator of policy advice being addressed by the Washington-based institutions to Latin American countries as of 1989" (Williamson, 2002), and it grew out of a conference in 1990 at the Institute for International Economics on economic policy reform in Latin America and the Caribbean. Williamson, in his conclusion, summed up the conference by stating that Washington had reached a substantial degree of consensus regarding the following 10 policy instruments: fiscal discipline; public expenditure priorities in education and health; tax reform; positive but moderate market-determined interest rates; competitive exchange rates, liberal trade policies, openness to direct foreign investment; privatization; deregulation; and protection of property rights (Williamson, 1990 cited in Burki and Perry, 1998: 7; see also Lee and Mathews, 2009).

It is true that the IMF and the World Bank promoted neo-liberal policies during the 1980s and most of the 1990s, but it seems that that no longer is the case. And as early as 1998 the World Bank published a document entitled *Beyond the Washington Consensus: Institutions Matter* (Burki and Perry, 1998). In it is expressed that what is labeled "first generation reforms"—those following the stipulated Washington Consensus—were expected to "significantly reduce poverty and inequality… [but] this has not occurred." Instead "wage differentials between skilled and non-skilled labor appear to have widened…which has resulted in poverty rates that are *unacceptably high*. In addition, economic insecurity for the poor and middle classes, linked to job insecurity and income volatility, has tended to increase" (Burki and Perry, 1998: 1, emphasis added). It is suggested that the situation now calls for 'institutional' reforms. The globalization of national economies, the implementation of the first generation reforms, and the process of democratization in Latin America and the Caribbean are contributing to a rise in the demand for institutional reforms' along three dimensions:

1. There is an increasing demand for institutional reforms on the part of the private sector, which now competes in a global marketplace and has realized that its profitability or competitiveness is affected by the quality and efficiency of the delivery of financial and public services, the quality of education, and the effectiveness of the judicial system.
2. The rapid growth of volatile capital flows has increased the demand for institutional reforms that may help mitigate the risks associated with this trend.
3. Globalization has increased the demand for institutions that can help reduce income inequality and provide social safety nets for people who are rendered more vulnerable in the new competitive environment (Burki and Perry, 1998: 2).

This perspective has been labeled "after-neoliberalism" and is viewed to emphasize a social investment approach to the developmental welfare state (Jenson, 2010).

When it came to Europe and welfare state developments, neoliberalism meant privatization and retrenchment, less instead of more government; and more self-reliance as argued by Margaret Thatcher in the UK in the 1980s or by IMF in post-socialist Central and Eastern Europe in the 1990s. Neoliberal trends in Europe have also been associated with the creation of the Economic and Monetary Union project of the early 1990s within the European Union member states. In what follows the thesis of neoliberalism is tested against welfare state developments.

Development of Social Expenditure

The most simple and, admitted superficial, way of assessing welfare state cutbacks is to view total social spending either relatively, set against the GDP, or in absolute terms—per capita. The tables below do that for clusters of European countries. Throughout the paper welfare development and welfare reform are discussed with reference to five different trajectories: former state-socialist states, Continental Europe, Atlantic Europe, Southern Europe and Scandinavia. Although the number and demarcations of welfare regimes are contested (for an excellent overview see Powell and Barrientos, 2008). It is a widespread perspective and a good tool to order European welfare states (Abrahamson, 1999a). Concerning the perhaps most contested cluster—that of Central and Eastern Europe—I agree with Francis Castles and Herbert Obinger (2008: 321) when they write, "[o]ur main conclusions are that country clustering is, if anything, more pronounced than in the past, that it is, in large part, structurally determined and that the EU now contains a quite distinct post-Communist family of nations."

In relative terms the Visegrad countries have caught up with the OECD average when it comes to social spending, but in absolute terms they are much less affluent, and hence spent much less on welfare polices than an average OECD country did. Yet the Visegrad countries have expanded their spending considerably from 1990 to 2005 (between 50 pct. and 250 pct.).

During the Thatcher and Major years (1979-1997) the UK expanded on social expenditure both relatively and absolutely, and she has continued to do so under Blair (New Labour). The UK has followed the OECD average for 25 years except for the mid 1980s. In absolute terms, Ireland has increased its social spending by 300 percent during this period of time and is now at par with the UK and the OECD average. Continental Europe stands out as a big spender when it comes to social policy, generally spending about 50 percent more than the OECD average, and with Luxembourg as the biggest spender of all in absolute terms. Most countries doubled their spending from 1980 to 2005.

The Scandinavian countries more than doubled their social policy effort from 1980 to 2005 in absolute terms, while relatively speaking they progressed moderately during this period of time. In relative terms Central and Eastern EU-member states are small spenders with between 13 to 18 percent of the GDP devoted to social protection, and many states spent relatively less in 2005 than they did in 2000. However, in absolute terms they all spent more in 2005 than they did in 2000; but the dispersion in absolute spending is striking. The poorer

Table 1. Total Social Expenditure as Share of GDP 1980-2005

	1980	1985	1990	1995	2000	2005
Visegrad countries						
Czech republic	..	..	16.0	18.2	19.8	19.5
Hungary	..	..	..	..	20.0	22.5
Poland	..	..	14.9	22.6	20.5	21.0
Slovak republic	..	..	..	18.6	17.9	16,6
Atlantic Europe						
Ireland	16.7	21.3	14.9	15.7	13.6	16.7
The UK	16.7	19.8	17.0	20.2	19.2	21.3
Continental Europe						
Austria	22.5	23.8	23.9	26.5	26.4	27.2
Belgium	23.5	26.0	24.9	26.2	25.3	26.4
France	20.8	26.0	25.1	28.6	27.9	29.2
Germany	22.7	23.2	22.3	26.5	26.2	26.7
Luxembourg	20.6	20.2	19.1	20.8	19.1	23.2
The Netherlands	24.8	25.3	25.6	23.8	19.8	20.9
Scandinavia						
Denmark	24.8	23.2	25.1	28.9	25.8	27.1
Finland	18.0	22.5	24.2	30.9	24.3	26.1
Norway	16.9	17.8	22.3	23.3	21.3	21.6
Sweden	27.1	29.4	30.2	32.1	28.5	29.4
Southern Europe						
Greece	10.2	16.0	16.5	17.3	19.2	20.5
Italy	18.0	20.8	20.0	19.9	23.2	25.0
Portugal	10.2	10.4	12.9	17.0	19.6	23.1
Spain	15.6	17.8	19.9	21.4	20.3	21.2
Central and Eastern European Union Non-OECD Members						
Bulgaria	..	..	..	..	..	16.0
Estonia	..	..	..	..	14.0	12.7
Cyprus	..	..	..	..	14.8	18.4
Latvia	..	..	..	..	15.3	12.4
Lithuania	..	..	..	..	15.8	13.1
Malta	..	..	..	..	16.9	18.4
Romania	..	..	..	..	13.2	14.2
Slovenia	..	..	..	..	24.2	23.0
OECD	16.0	17,7	18.1	19.9	19.3	20.6
EU-25	..	..	..	..	26.5	27.3

Source: OECD (2009); Eurostat (2009a).

Table 2. Total Social Expenditure per Capita at Constant PPP US $ 1980-2005

	1980	1985	1990	1995	2000	2005
Visegrad countries						
Czech republic	..	..	2.322	2.524	2.964	3.523
Hungary	..	..	..	..	2.459	3.455
Poland	..	..	1.093	1.833	2.164	2.590
Slovak republic	..	..	..	1.741	1.964	2.291
Atlantic Europe						
Ireland	1.891	2.635	2.346	3.010	3.886	5.723
The UK	2.769	3.583	3.567	4.546	4.963	6.094
Continental Europe						
Austria	4.316	4.906	5.640	6.745	7.683	8.285
Belgium	4.458	5.175	5.697	6.394	6.963	7.695
France	3.745	4.930	5.436	6.424	7.030	7.696
Germany	3.581	3.935	4.371	6.261	6.785	7.109
Luxembourg	4.995	5.492	7.167	8.796	10.529	13.996
The Netherlands	4.764	5.049	5.857	5.907	5,813	6.355
Scandinavia						
Denmark	4.685	5.040	5.817	7.381	7.431	8.176
Finland	3.060	4.256	5.296	6.362	6.237	7.476
Norway	3.624	4.428	5.924	7.226	7.683	8.468
Sweden	5.202	6.269	7.114	7.510	7.913	9.094
Southern Europe						
Greece	1.553	2.369	2.538	2.763	3.523	4.600
Italy	3.124	3.919	4.375	4.637	5.948	6.477
Portugal	988	1.026	1.693	2.419	3.343	3.974
Spain	2.011	2.407	3.327	3.811	4.326	4.928
Central and Eastern European Union Non-OECD Members						
Bulgaria	..	..	..	..	..	373
Estonia	..	..	..	..	623	896
Cyprus	..	..	..	..	2.148	2.918
Latvia	..	..	..	..	547	558
Lithuania	..	..	..	..	559	781
Malta	..	..	..	..	1.845	1.973
Romania	..	..	..	..	238	260*
Slovenia	..	..	..	..	2.613	2.671*
OECD	2.642	3.152	3.662	4.332	4.821	5.628
EU-25	..	..	..	..	5.359	5.964

Note: * - 2006.
Source: OECD (2009); Eurostat (2009a).

states spent 260-900 € per capita while the richer ones spent 2000-3000 € per capita.

From a social expenditure perspective it is not possible to identify any signs of retrenchment within European welfare states, a finding consistent with that of German colleagues from Bremen. As concluded by Heinz Rothgang, Herbert Obinger and Stephan Leibfried (2006: 254), "…, the trajectory of social expenditure since 1980 suggests that the welfare state is not in retreat" (see also Leibfried and Obinger, 2003). Having said that, it was also revealed that commitment to social protection is not very developed in the small Baltic states and in Romania and Bulgaria.

Welfare Reforms in Europe

This section assesses the degree and direction of welfare reform within the five different welfare regimes following the sequence adopted in the previous section. Regarding Central and Eastern Europe and the UK the focus is on the period of uncertainty in the 1980s and 1990s, while the most recent development is in focus regarding the other regimes. The section concludes with some attempts toward crosscutting reflections.

Central and Eastern Europe: neoliberalism and beyond

> *The transition of post-communist regimes to capitalism started at a time when the global hegemony of neoliberalism was at its height.*
> *Thus, the neoliberal premises of the Washington consensus and respective advisors shaped the policies aimed at radical, systematic transformation from non-capitalist regimes to capitalist ones.*
> *The transition to capitalism was designed to be essentially market-led.*
> (Drahoukoupil, 2007: 408)

There can be no doubt that welfare reform in Eastern Europe took place within a climate of neoliberalism as indicated by the epigraph above. Jan Drahoukoupil (2007) identified two qualitatively different phases of development of the neoliberal transformation in the four Visegrad countries, which he labeled: the Klausian welfare national state, and the Porterian workfare postnational regime. "The Klausian state focused on stimulating local capital and co-

constituted a growth dynamic largely based on the environment of soft credit and state spending, including relative generous social policies. …, in spite of the radical neoliberal rhetoric, the Czech strategy of post-socialist transformation can be characterized as social-liberal" (Drahoukoupil, 2007: 402). Hence, even when the development saw strong elements of privatization and marketization, it did not dismantle social citizenship. The reform package included: an anti-inflationary policy (monetary restraint), price liberalization, the freeing of imports, strict wage control, the legalization of collective bargaining, and "a comparatively very generous and elaborate social and health-care system" (Drahoukoupil, 2007: 411). Thus, he characterized the four Visegrad countries as welfare states, and explained that an elaborate system of social provision was introduced in order to guarantee social peace during the process of post-socialist transformation. Development in this early stage can "hardly be identified as laissez-faire" (Drahoukoupil, 2007: 414).

However, from 1998 and onward these countries experienced a 'sea change' toward externally oriented competitive policies of the supply-side kind. Yet, welfare provisions were still maintained even if a significant active turn can be identified. Similarly, Maria Bordas (2001: 232) from Hungary maintained that "[w]elfare privatization in post-communist countries has been fairly limited."

If we differentiate welfare policies and consider the two most important elements, two opposite tendencies have appeared in Eastern and Central Europe: Regarding *pensions*: a radial alteration with a liberal strategy (except in Czech Republic and Slovenia) because eight of the countries converted their pay-as-you-go systems into multi-pillar models with capital-funded components. Hence, 'many of the redistributive elements of the old socialist system were eliminated' writes Björn Hacker (2009: 154). But, regarding *health care* the basic principle of universalism was preserved. In most of the Central and Eastern European countries "the right of free access to health care provision is fixed in the constitution" (Hacker, 2009: 157). Concerning the Eastern and Central European welfare regime with respect to unemployment policy it has leaned toward being supply-side, being focused on the employability of workers—which is a productivist approach, but hardly a neoliberal one.

So, even when Central and Eastern Europe from the outset could be considered the most obvious contenders for demonstrating a neoliberal development this does not hold true for social protection, and this is most probably explained by politicians listening to their constituencies (or fearing them) as shown by Byung-Yeon Kim and Andrew Roberts (2009).

Atlantic Europe: the Example of Thatcherism and the UK Third Way[1]

Another obvious contender for a neoliberal turn in Europe would be the United Kingdom under Margaret Thatcher. Ideologically, the Conservative Party taking office in 1979 signaled a profound change in the approach to welfare provision, and the new Prime Minister became not only associated with but actually personified the new times dubbed by some as 'after the golden age.' A common reference point in the political debate during the 1980s was Reaganomics and Thatcherism indicating that liberal economics and political conservatism were (again?) back behind the steering wheel of the modern state, at least in the US and the UK. The rhetoric of the various Thatcher governments certainly was anti-public intervention and extreme to the extent of denouncing the existence of a common identity, as expressed in the famous quote: "Who is society? There is no such thing! There are individual men and women and there are families and no government can do anything except through people and people look to themselves first" (Thatcher, 1987). During this period of time, critical scholarship amplified this impression of a government seriously devoted to rolling back the welfare state and substituting it with free market solutions in a privatized environment (see e.g. Jessop et al., 1984 and numerous articles in *Critical Social Policy*). And, indeed, it was. Rodney Lowe sums up the situation prevailing in the late 1970s as such: "To many, in brief, the welfare state was beginning to appear not only politically but also morally bankrupt...the New Right was also inherently hostile to state welfare…the New right was committed to—just like the Poor Law reformers of the 1830s—to a 'remoralising' of society" (Lowe, 1993: 303-4). But he then goes on to ask how effectively the classic welfare state was actually destroyed during this period, and he identifies two major casualties: One is the commitment to full employment; the other is corporatism. Nevertheless, "the social services remained largely unscathed… despite the explicit commitment of Conservative governments after 1979 to 'roll back' the state, to end the 'dependency culture' and to reduce taxation, public expenditure steadily rose in real terms between 1979-80 and 1986-7" (Lowe, 1993: 309). Examining specifically the development within social security and personal social services, Lowe (1993: 318) concludes that "on the best evidence available, however, it is clear that the radical ideas of both the 1970s and the 1980s were disappointed".

So, viewed from some distance, the Thatcher (and Major) years cannot

[1] This sub-section follows Abrahamson (1999b).

adequately be described as a process of dismantling the welfare state in Britain, which we learnt from Lowe and which is also reflected in the scholarship presented in the book *The State of Welfare* from 1990, which collects the research of 11 scholars on the development of welfare in Britain since 1974 (Hills, 1990). Julian Le Grand starts out by describing the apparent paradox that confronts us here:

> … Some people may have come to this work [the book] expecting to find a chronicle of decline. Nor would such an expectation have been unreasonable. It would have been plausible to suppose that a combination of the economic difficulties encountered by Labour government in the 1970s and the ideological hostility to welfare of the Conservative government in the 1980s had led to a sharp diminution of the welfare state and, in consequence, to an increasing marginalization of public welfare. Yet more seriously, this would have been accompanied by damaging changes in welfare 'outcomes,' including falls in the average levels of key indicators of welfare and perhaps also increasing inequalities in those indicators. There are indeed important parts of the welfare state which show the expected pattern of decline. But the overall picture is rather different…. In absolute terms, therefore, so far from there being a decline, there was a rise [in public welfare expenditure from 1974 to 1988]—indeed, at over a third, a significant one…there is no evidence to support a story of serious decline. (Le Grand, 1990: 338-40)

One significant change to be recorded for this period is that the relative increase in welfare expenditure and the rate of increase which had characterized the post World War Two situation stopped around 1976. Since then welfare expenditure has taken up the same share of the GDP: around 25 percent. Le Grand (1990: 344) analyses the development in expenditure for various categories of welfare provision and tries to relate it to estimates of 'need' most often represented by demographical indicators and concludes that "trends in expenditure seem to have followed trends in needs." The explanation he offers is the middle class-thesis, i.e. that areas that have the interest of the middle class developed the most. Turning to an evaluation of the development of welfare outcomes over this period of time, the conclusion is that there has been steady improvement (Le Grand, 1990: 347-50).

Based on these sources we should conclude that the change in welfare provision during the Conservative reign has been one of organizing welfare. It is no longer self-evident that the public sector must regulate, finance and provide all welfare services. Especially incorporating private firms in the provision was a significant and major change; but it was not a change leading to a dismantling of welfare security for citizens on the whole. "No matter how dramatic it might have seemed to observers (not to mention end-users) on the spot, the shift from Beveridge-style liberal universalism to post-Thatcher-style liberal stakeholdership was arguably not that great" (Finer, 1999: 29). Ideologically, the Conservatives paved the way for a welfare mix-approach to social policy, an approach which has been continued by the New Labour government under Tony Blair. Blair (1998: iii) wrote, "[w]e want to rebuild the system around work and security. Work for those who can; security for those who cannot," introducing the blueprint for reforming the British welfare state in 1998. Welfare reform is viewed as part of a larger picture in which Britain should become a "model of the 21st century developed nation" premised on sound and stable economic development, with dynamic enterprises, the best educated workforce in the world, and "a welfare state that promotes our aims and achievements" (Blair, 1998: iii).

This document entails a strong belief in a welfare mix approach to the welfare state as is clear from the following quote:

> It is clear that while the state has a crucial role to play in the provision of financial welfare, employers, private sector, private-sector financial institutions, trade unions, mutual organisations and friendly societies are all important partners…Voluntary organisations are also a vital part of the welfare mix [sic!], either providing services alone or in partnership with government. Historically, voluntary provision has led and encouraged government provision. Today, government and the voluntary sector act in unison to maximize help for those in need. Charities, good neighbour schemes and credit unions all make an enormous contribution to society. (Blair, 1998: 15-6)

The Third Way welfare policy focuses on: activation and individualism, but also on fighting (child) poverty and increasing female labor participation. Thus, productivist elements can be identified, but the development does not qualify for being termed neoliberal.

Continental Europe: A frozen welfare landscape or simultaneous reductions and improvements of welfare entitlements?

According to a study directed by Maurizio Ferrera at the end of the 1990s, the major reason for welfare reform in Continental Europe was unsustainable pension systems, "[t]o a large extent, the crisis of the welfare state is the crisis of social insurance (pensions)" (Ferrera and Rhodes, 2000b: 265). Analyzing pension reforms ten years later, Frericks, Maier and de Graaf found tendencies both toward privatization and solidarity:

> We propose the thesis that the current developments cannot be satisfyingly grasped by a neoliberal or neoetastic perspective, but must be interpreted as representing a new mix of the dynamic state-market relationship. This mix combines the stick of the market with the carrot of (equalizing) state interventions, where they are not seen as separate and in opposition but as co-productive for so-called public-private arrangements. (Frericks, Maier and de Graaf, 2009: 138)

Among the *neoliberal* reform measures they identify: the introduction of private pension schemes; more space for private financial institutions (banks etc.); and a stronger individualization of obligations and entitlements. Among *neoetatistic* reform measures they identify: strict new regulations for pension funds; and the linking of some pension rights to education and/or periods of care, meaning that in those periods of time pension 'points' are earned even if the persons are not working. Studying not only the practices of pension reform in Europe but also the discourses surrounding them, they found that "the two different and classically alternative perspectives [of neoliberalism and neoetatism] partly intersect" (Frericks, Maier and de Graaf, 2009: 145). Examining the case of Germany it is concluded that "it is prototypical for its blending of private and public elements and for its paying attention to life course aspects of caring within this blending" (Frericks, Maier and de Graaf, 2009: 147).

The overall conclusion is that we are witnessing the development of a new form of social citizenship resting on a *welfare mix* approach, which contains private as well as public elements:

> Citizens' obligations and entitlements are being redefined in the sense that behavior which apparently supports long-term developments of society as such, is rewarded thus, resting on a more holistic understanding of responsibilities one could speak of a kind of anthropological system-sustaining citizenship. By this we mean that the shift in welfare regimes can be seen as aiming at the transformation of the 'protection' of citizens-in-need because of unemployment, sickness, education, or age to the 'activation' of citizens as individually participating in and being responsible for the risks and opportunities of the current society. Citizenship is thus not defined in terms of acquired status, but as the possible or actual differentiated contribution to society. We would

> propose the concept of the 'productive citizen' to delineate this new form of citizenship. (Frericks, Maier, and de Graaf, 2009: 151-152)

Regarding applying the concepts of neoliberalism and its presumed opposition, neoetatism, these authors conclude that it is not very 'fruitful' even if elements of both can be found. They have convincingly shown, at least in the case of pension reform, that the real picture is much more complex. So, to them it is not either or, but both at the same time, "[t]he important feature of the new mix is precisely the coupling of public and private means, also with according forms of governance, as constituting a new form of citizenship" (Frericks, Maier and de Graaf, 2009: 153). This is in line with Stephan Leibfried and Herbert Obinger (2003: 209)'s analysis of German welfare reform, where they found that "no consistent pattern of reform can be found"; rather "beginning in the mid-1980s, retrenchment was accompanied by selective welfare state expansion, focused first on family policy."

A similar observation is made by Daniel Clegg when analyzing welfare reform in Continental Europe with respect to unemployment benefits. Focusing especially on the Dutch case he found that "the reform path has been complicated, not to say confused" (Clegg, 2007: 609). Yet, he did find an overall pattern in the changes considering Belgium, the Netherlands, Germany and France:

> Generally, policies have enhanced protection for 'insiders' while targeting both benefit cuts and new activation initiatives on 'outsiders.' After a quarter century of reforms these are thus neither fully activating nor fully compensatory welfare states… There is a suggestive parallel—and probably a two-way causal link—here with the dualism of labor market regulation increasingly found in much of Continental Europe, where precarious employment contracts have been expanded as 'exceptions' that simultaneously contradict and reinforce the 'rule' of standard employment. (Clegg, 2007: 613)

What we are witnessing here is also reflected in the discussion of so-called flexicurity, which is a combination of flexible labor markets (read: no job protection) and generous welfare provisions facilitated by active labor market policies. Originally a Scandinavian and Dutch affair, it is now being promoted across Europe by international organizations such as the European Commission and the OECD. Elke Viebrock and Jochen Clasen (2009: 307) suggested that "flexicurity policies might be characterized as a form of synchronization of economic and social policy, as a post-de-regulation alternative." They also characterize it as a 'third way' strategy between traditional liberal labor markets of the

Anglo-Saxon countries and the strict job security of Continental and Southern European countries.

Clegg endorsed the perspective promoted by Wolfgang Streeck and Kathleen Thelen (2005) of "incremental change with transformative results." Changes have not been of the 'big bang' kind, but even if they are small and piecemeal, they nevertheless form a pattern over time (see also Hall and Thelen, 2009). In this case the pattern has been an increasing marginalization of immigrants, refugees and other ethnic minorities; and a large proportion of youth and people with substandard productivity due to bad health, handicap or degrees of invalidity; while the super fit core workers enjoy enhanced entitlements. However, these processes of polarization and marginalization do not necessarily spill over into increased inequalities and rising poverty rates, at least not in the Dutch case as demonstrated by Anthony Annett (2006).

The overall conclusion is that welfare reform has been aimed at adjusting entitlements to conditions of post-industrialism; changes have been incremental with some retrenchment concerning weaker segments and some improvements concerning core groups of citizens (Bonoli, 2007; Rothgang, Obinger, Leibfried, 2006).

Southern Europe: Public Health Care and Guaranteed Minimum Income

Both Southwestern and Southeastern Europe are the least developed areas when it comes to welfare state provisions and interventions. These regions contain the laggards and latecomers, who have the strongest reliance on family networks and voluntary organizations in Europe. Yet, the development has generally been one of expansion and universalization, even if it had a late start. This sub-section briefly considers the Southwestern Europe's development with an eye toward health care and guaranteed minimum income schemes.

With the installation of democratic rule succeeding the military dictatorships, social citizenship rights saw rapid expansion in Southern Europe. Different paths have been chosen in different fields, but in the case of health care, the four South European states, during the 1980s, chose to develop universal public health care systems as Ana Guillén (2002) has informed us. More recently, however, these already mature systems have been undergoing reform, at least in Greece and Spain; and the literature point to some problems of e.g. regional inequality, insufficient coverage and so forth (Petmesidou and Guillén, 2008). Particularly concerning the Greek case, there seems to be strong veto actors at play, hence drawing a picture more of a stalled reform process than of a radical one. Thus, Athanasios Nikolentzos and Nicholas Mays (2008: 174) assert that:

> …, the empirical research to date strongly supports the argument that health care reform in Greece is path-dependent because the parliamentary and government process allows the main actors in the system, such as hospital doctors and university doctors, to shape any reforms so as to maintain the status quo. The role of institutions is crucial in explaining this and, in particular, explaining the development of Greek society, the resultant nature of the Greek state and the related peculiarities of its welfare state. The brief history of the three periods of recent system reforms shows how vested interests (such as the trade unions of already privileged groups) and the medical profession (junior hospital doctors, senior hospital doctors and university doctors) have been able to exploit party-to-person clientelism.

A similar argument is made with reference to pension reforms in all four South European countries by Carrera Leandro, Angelaki Marina, and Carolo Daniel (2009: 1):

> Thus, while Italy has been able to adopt more path-breaking reforms that ultimately reduced the generosity of the public pension system significantly while enhancing the role of the second pillar, reform in Spain has been more modest although the measures adopted have helped strengthen the financial sustainability of the first public pillar. Meanwhile, pension reform efforts have largely stalled in Portugal and Greece, and recent reforms have only been approved after providing significant concessions to the labor movement.

A third social policy area which has undergone considerable analysis is that of guaranteed minimum income schemes. Leonor Vasconcelos Ferreira (2008: 67-68) offers this critical evaluation:

> New developments in social policy were introduced in South European countries in the late 1990s, especially through centre-left governments (Guillén and Matsaganis, 2000; Matsaganis et al., 2003)… As a consequence of these new political ideas, there has been a clear review of the social policy agenda with an increase in and restructuring of social expenditures in Southern Europe… programmes of income support and activation, such as minimum income schemes, were introduced in several Spanish regions during the 1990s and nationwide in Portugal in 1997; however, the programmes lasted only a few years in Italy and were never implemented in Greece.

Such programs, though, have been continued on a local and experimental basis in Italy (Kazepov and Sabatinelli, 2002; Ferrera, 2008). So, even if they are not making reference to an overall national legislation, they must nevertheless be considered an improvement of social citizenship entitlements in Italy and Spain; and in Portugal there is now a national obligation toward the integration of marginalized citizens. However, Greece is still trailing behind. In a comparison with Cyprus, Gabriel Amitsis (2009: 1) stated:

> The major difference between the Greek and the Cypriot social welfare regimes lies in the treatment of needy/socially excluded persons by the public sector. Greece does not provide for a social safety net (in the form of a general guaranteed minimum income scheme)… The second major difference corresponds to the application of active inclusion policies for welfare claimants/beneficiaries. Greece has not introduced a concerted policy in the national welfare agenda.

The very low priority to welfare provision in Greece probably partly explains the youth protests during the winter of 2008 and that of 2009.

Finally, the near absence of public care arrangements in the south must be mentioned briefly since they aggravate the future constraints on these societies. The increasingly unfavorable ratio between those of working age and the elderly is increasing because of very low fertility rates; this low fertility equilibrium, as it is in Germany (Leibfried and Obinger, 2003: 203), is associated with the lack of care facilities other than totally private ones. Hence, Henjak (2008: 191) cites Francis Castles for the opinion that "visibly lower fertility rates in those countries [of Southern Europe] are mainly due to the lack of suitable child care and flexible work arrangements for working parents". It is only certain middle class groups that can afford to employ a Latin American or Eastern European caretaker, which is the otherwise common solution. It has proven impossible to keep women away from the labor market, but since they still have the main responsibility of caring for children and frail parents, they postpone and reduce childbearing (Bifulco and Vitale, 2006; Da Roit, Bilan and Österle, 2007; Pfau-Effinger, 2005).

The South European welfare states may still be incomplete; but the development has certainly been one of expansion, and not of retrenchment.

Scandinavia: Incremental Changes in Different Directions[2]

The 20th Century has seen the emergence,
massive expansion, maturation, and, subsequently,
the crisis of systems of social protection
in the Nordic and the other European countries.
The current crisis has financial,
ideological and political dimensions.
(Palme, 1999: 13)
Generally, fundamental features
of the Nordic welfare state...remain,
for the most part, intact.
(Swank, 2000: 114)

There is widespread agreement that Scandinavian welfare states have changed during the 1990s, but many observers have focused more on their resilience to change; i.e. changes have not, overall, been viewed as paradigmatic. "In the past twenty years the Nordic welfare states have overcome a sea of changes in family structures and labor markets, and even demonstrated a remarkable ability to survive through periods of dramatic economic turmoil…" (Kautto et al., 2001: 271; see e.g. also Nordlund, 2000; 2002). Yet, others have pointed to the mounting evidence of the introduction of elements otherwise characteristic of the Atlantic, the Continental, and even the Southern European model, "[g]overnment ability to control and command are now being challenged by an unclear horizontal and vertical separation of powers, regionalization and globalization, decentralization and devolution, and the involvement of nongovernmental units in the policy steering process (i.e. governance)" (Micheletti, 2001: 265). What is evident is that both Finland and Sweden experienced negative growth during the mid-1990s, and with the exception of Norway, the Nordic countries have not expanded welfare provision in relative terms.

When defining the Scandinavian model of welfare, the issue of universalism is central. Is welfare in Scandinavia more dependent upon residency than on having the status of a worker? The answer is still: yes! But it is less so than before. In all of the four Scandinavian countries, access to social insurance benefits has been restricted and the divide between members of the middle class and

[2] This sub-section follows Abrahamson (2005).

marginalized groups has increased. Elements of individualization, decentralization, more reliance on family and kin, and market solution are pushing Scandinavia closer to principles governing the other European Union welfare models.

In the general understanding, the Scandinavian model has been considered not only universal, but also comprehensive; both elements indicating that these welfare states are big spenders. Indeed, the Scandinavian welfare states are big spenders, but not bigger than other Northwestern European welfare states as demonstrated above. Spending in relative terms is at par with the situation in Germany, France, Belgium, the Netherlands and Luxembourg. Furthermore, the trend in expenditure levels is toward a catch-up convergence since those countries spending the least have the highest growth rates; the all- time big spender—Sweden—has not expanded during the 1990s (although it was publicly announced that "the cuts in the welfare system have been completed" (NOSOSCO, 1998: 15).

Another feature of Scandinavia is a high degree of reliance on general taxation for financing welfare provision. Here, the trend is that contributions are increasing and tax shares are decreasing; yet the public sector still picks up the lion's share; but—perhaps—more importantly: financing is politically decided by the parliaments and not negotiated between the social partners. The parliaments still decide who and with how much welfare should be financed; but the growth in occupational pensions in Denmark is a move towards more Continental financing.

The Scandinavian model was characterized by a high degree of public provision; yet the trend is toward more private insurance and labor market negotiated schemes regarding pensions and additional health insurance; and since the 1980s private hospitals have been introduced (in Denmark). It is also a hallmark of Scandinavian welfare that personal social services are provided by the municipalities; but the trend is toward more contracting-out, especially regarding home care for the elderly and handicapped (at least in Denmark and Sweden). Furthermore, both the Danish and the Norwegian governments are strongly encouraging and financially supporting voluntary service provision (volunteer centers), while other civil societal institutions such as relatives have had a bigger role to play in Sweden regarding old age.

High quality provision was also part of the definition; yet a number of scandals with regard to care in nursery homes (in Sweden) and in hospitals (Denmark) indicate the opposite; dissatisfaction with especially the health care systems is also widespread. In addition, the constant queuing within the secondary health sector in all of the Scandinavian countries is a sign of a lack of quality in the health care system.

High compensation rates have also traditionally been viewed as a hallmark of the Scandinavian model. But, as demonstrated above, the developments in compensation rates are nearly all negative, meaning that benefits have become less generous since the mid-1990s. Social assistance and basic pension are not able to keep people out of poverty, with compensation less or around 50 percent of a standard disposable income. Still, the Scandinavian countries are more (income) egalitarian than any other country in the world; but it is more due to the working of the tax system and the organizing of the labor market than it is due to social policies.

Within the areas of health care, pensions and old age and employment changes of the second and third order have been identified which all point in the direction of principles and institutions hitherto considered as trademarks of either the South European model, the reliance on family, networks and voluntary organizations, the Continental model, the close embeddedness in the labor market with its build in tendency of creating a dual structure, and the Atlantic model with its emphasis on market solutions. Yet, nowhere else is such a large share of the total population gainfully employed as in Scandinavia, and the model (under change) still receives strong support from the population according to all opinion polls (Andersen et al., 1999). The Scandinavian welfare states are still distinct, but less so; they are being Europeanized.

The most important third order change is the active turn in welfare policy in Scandinavia. To some extent unemployment is no longer considered a macroeconomic problem linked to a downturn in the business cycle, but is associated more with insufficient qualifications. Based on this kind of thinking labor market policies are now focusing on the employability of people. If people are unemployed they must have their skills upgraded, and that is supposed to happen with activation measures. However, the most important effect of activation has proven to be what economists have labeled the "motivation effect" or what sociologists refer to as the "scare effect". When unemployed people approach the time to go into activation, they significantly increase their job search and consequently also their employment. What happens is that they drastically lower their expectations concerning pay, benefits and relation to their education, distance to the workplace, etc. (for the Norwegian case, see Lødemel, 2001; for the Danish case, see Abrahamson, 2009).

Comparative Studies Cross-Cutting the Five Welfare Regimes

Even when the welfare regime approach is accepted, some studies try and include developments within all five regimes, usually with reference to OECD or Eurostat data. A few such studies shall be commented upon here. Peter Taylor-Gooby (2008) sums up a number of common developments across Europe that have surfaced in this paper. His reading of the literature leads him to suggest that Western European welfare states, 'broadly speaking,' have developed through three distinctly different phases: "confident and continuous expansion in the 1950s, 1960s and 1970s; a period of uncertainty and challenge during the late twentieth century; and more recently, movement toward a *new welfare state settlement*" (Taylor-Gooby, 2008: 4; emphasis added). He uses the term settlement to "denote a paradigm shared across a number of significant actors and presented as appropriate to meet identified problems and promote future successful developments" (Taylor-Gooby, 2008: 4). Key to this new settlement is an understanding of the welfare state as productivist. Hence, he labels it the "new social investment state." What he identifies is:

> A shift toward a view that the government is to promote national competitiveness in an increasingly international market, and away from a passive providing state to one which seeks to enhance self-activity, responsibility and mobilization into paid work among citizens. Social policy is shifting from social provision to social investment. (Taylor-Gooby, 2008: 4)

Others have applied that label too; e.g. Jenson and Saint-Martin (2003) in the paper where they identified a change toward a stronger emphasis on social cohesion with regard to welfare policy recommendations (see also Jenson, 2010).

Taylor-Gooby (2008: 11) suggests that this new welfare state settlement rejects what he calls the "loose monetarist conclusion that welfare states are at best irrelevant and at worst counter-productive." Instead it tries to maintain the usual range of popular mass services, but with a continued pressure for cost-efficiency. Here, the emphasis is on welfare as social investment, and no longer on welfare as a burden on the economy. He finds that such a productivist interpretation of the welfare state is promoted both by the EU, the OECD, and among main national governments (in Europe). Flexicurity is one element in this productivist interpretation of the welfare state, and with it a stronger emphasis on activation, but more through benefit redesign than actual positive support for mobility between jobs (Taylor-Gooby, 2008). He sums up thus:

> De-regulation; policies to make work more attractive for those on low wages; cutbacks in passive benefit schemes that do not require recipients to pursue

> jobs, such as early retirement or job-creation; greater use of regulated social assistance and case management; specific programs for high-risk groups (young low-skilled people, single-parents); and more child-care, particularly for those on low incomes. (Taylor-Gooby, 2008: 13)

Taylor-Gooby (2008: 19-20) identified those main supporters of this new welfare settlement to be governments concerned about maintaining competitiveness and business interests, while the resistance has come from the labor and trade union movements—particularly in Continental and Southern Europe:

> In short, the general direction in Europe has been toward a decline in the influence of labor in relation to employers' interests. The outcome has been that it is the negative activation rather than the positive social investment in research and development and in supporting labor mobility that has tended to predominate in policy. The new social investment strategy is much more prominent in policy debates and discussions at the European level than in what emerge in policy in individual countries. (Taylor-Gooby, 2008: 20)

He concludes by suggesting that "European countries have some way to go in achieving a new welfare state settlement that fully reconciles economic and social goals" (Taylor-Gooby, 2008: 21).

In an equally important paper, Giuliano Bonoli (2007) points to the importance of the time dimension. His main thesis is that initially welfare state provisions developed as a response to risks associated with industrial societies, and that the change to postindustrialism has happened at significantly different times in different areas of Europe, which in turn has led to different conditions for welfare state adoption. He claims that social risks have changed considerably from industrial to postindustrial society. He also asserted that "the postwar welfare state was protected well against the risk of being unable to extract an income from the labor market, be it because of sickness, invalidity, old age, or lack of unemployment" (Bonoli, 2007: 496). It did so by granting entitlements to the male breadwinner and relied on stable family relations and a clear division between husband and wife. However, with postindustrialisation, things have changed dramatically and the new social risks include precarious employment, long-term unemployment, being a working poor, single parenthood, or an inability to reconcile work and family life. "Broadly speaking, the Nordic and some English-speaking countries…have been the first set of countries to enter the postindustrial age in the 1970s. They were followed by Continental European countries about a decade later and by Southern Europe even later"

(Bonoli, 2007: 511). Furthermore:

> Whether countries manage or fail to reorient their welfare state in a way that reflects changed socio-economic circumstances, they depend on the relative timing of key socioeconomic trends in interaction with existing welfare state structures. The key developments are postindustrialization and the increase in the cost of the industrial welfare state resulting from the combination of demographic aging and generous pension promises. These two developments must not happen simultaneously if a welfare state is to successfully reorient. (Bonoli, 2007: 512)

He then demonstrates that the early postindustrializers, which are the Scandinavian countries, are the ones that have developed the most comprehensive systems of new social risk coverage. He writes that his findings are not good news for those who are hit by new social risks in Continental and Southern Europe. "These countries have missed a window of opportunity to reorient there welfare state. During the next two to three decades, because of population aging, it will become increasingly difficult to introduce new social policies" (Bonoli, 2007: 518). Finally, he emphasizes that this perspective on timing should be considered a complement rather than an alternative to other interpretations of welfare state development.

Two Swedish colleagues, Walter Korpi and Joakim Palme, have promoted an exception to the resilience and reform perspective. They found that "the long increase in social rights has been turned into a decline and that significant retrenchment has taken place in several countries" (Korpi and Palme, 2003: 425). Particularly, they found that "the British welfare state has been rolled back to a pre-Beveridge level, at or below that of the 1930s" (Korpi and Palme, 2003: 433-4). The apparent contradictory findings within social science literature on recent changes within European welfare states can, however, be explained by being more precise about what programs are being considered and what time span is being investigated. Korpi and Palme analyzed the net worth of compensation in cases of unemployment, sickness and work accidents from 1975 to 1995 and found the strongest case for retrenchment regarding unemployment insurance (see also Korpi, 2003). This is not incompatible with the view that, generally speaking, there has been little or no retrenchment within European welfare states. In EU-27 in 2006 unemployment compensation only took up 5.4 percent of the total social expenditure (Eurostat, 2009b: 5). Furthermore, some programs, notably unemployment insurance and social assistance, were subjected to cut-backs in the 1980s and 1990s—the period investigated by Korpi and

Palme; but if, for instance, pension and health care rights are not cut back and when family policies are being expanded, then the general picture is one of resilience to change rather than one of retrenchment.

Furthermore, Korpi has pointed out that one very important element in the post WW II social settlement, the commitment to full employment, has been given up and he views this as an significant retrenchment of social rights (Korpi, 2003: 589). What can safely be concluded concerning this period of uncertainty is that the social settlement that underpinned the golden age was changed.

Finally, a few words on the potential influence of EU membership on welfare state developments in Europe. As Tolga Bolukbasi (2009: 529) wrote, "[t]here exists a broad agreement in the political economy literature on the view that the EMU [Economic and Monetary Union] project represents the final stage in the process of institutionalization of neoliberalism across Europe." The argument was that the strict convergence criteria made it impossible for the member states to maintain high levels of public intervention. Instead a race to the bottom regarding welfare provision was to be expected. However, as demonstrated above, that has not happened. In addition, "new empirical evidence showed that while welfare states were in a constant process of transformation, these could not, even during the trials and tribulations of the convergence period, be characterized by downright retrenchment" (Bolukbasi, 2009: 528). He concluded that "[a]lthough the jury is still out over the future impact of EMU, a scenario of across-the-board retrenchment seems most unlikely in the foreseeable future" (Bolukbasi, 2009: 528).

So much to economic integration. When it comes to the so-called social dimension, the EU has long ago adopted a policy that does not involve the harmonization of social policy legislation. Instead the term applied is coordination. Space does not allow a thorough discussion of this dimension, which I have dealt with at length elsewhere (Abrahamson, 2007). A few conclusions must suffice. A number of decisions by the European Court of Justice have considerably widened the scope of social entitlements within the EU in the sense of categories of citizens that have such entitlements. What used to be rights for only (male) workers have gradually been extended to spouses, part-time workers, students and pensioners. But the court has not ruled on the level of benefits. Furthermore, most regulation, with the important exception of the social protection of migrant workers, which is regulated by Regulation 1408, is soft law initiatives such as recommendations, solemn declarations, resolutions, and the most recent so-called Open Method of Coordination (OMC). This is a policy instrument whereby the heads of states or governments in the bi-annual meetings in the European Council decide upon some common goals sometimes accompanied by tangible benchmarks such as in the case of the fight against social exclusion from the 2000 Lisbon summit. The member states must then file a report to the Commission explaining how they expect to meet the common goals, but they can apply any means—hence, leaving the different welfare regimes intact. After a designated period of time the Commission will collect reports on the progress made within each member state. The only sanctions are 'shaming and blaming,' parallel to OECD's publication of rankings of its member states with respect to various performances (See further Haverland, 2007; Murphy, 2005). The Greek case is illustrative of how little real influence the EU institutions have on national decision-making in the social area. Despite the signing of various recommendations and participation in the OMC, virtually nothing has happened in the development of social entitlements in Greece. Whether the newly appointed PASOK government (fall 2009) will make a difference remains to be seen. But the conditions attached to the recent bailout of the Greek state's colossal deficit make it unlikely that social entitlements will be improved under the conditions of reducing the public sector expenditure.

Conclusion

> *One of the findings that continues to emerge in the body of work focusing on welfare state reform is that reform is politically risky and difficult.*
> (Vis, 2009: 31)

Despite double the amount of pressure from globalization and Europeanization, European welfare states have not embarked on a race to the bottom. On the contrary, measured by social spending and the assessment of major programs, social citizenship has been strengthened and expanded over the last three decades; however, this does not mean that the welfare state has been resilient to change as assumed by some of the literature. European welfare states have indeed been reformed during the period of globalization and some significant changes have occurred in comparison with the golden age. The old welfare state settlement, for example, with its commitment to full employment, has been given up; also, unemployment insurance has largely changed its scope from compensating income loss in bad times to forcefully manipulate individuals' skills to better match current labor market conditions. Additionally, a more pluralistic risk management has developed by involving more sectors in a welfare mix approach, thereby leaving more room for private, market and civil societal solutions; but the state is still in charge of regulation and to a large extent also the financing of the social entitlements.

From a discourse-analytic perspective it is important to differentiate the era of globalization into the period of uncertainty of the 1980s and 1990s and the period of after-neoliberalism of the 2000s and beyond. Indeed the period of time following the first oil chock of the 1970s was a neoliberal era, which manifested itself very tangibly within areas such as the industrial sector, and financial policy as convincingly demonstrated by many contributions to this issue (Chandrasekhar, 2010; Chang, 2009; Fine, 2009; Masina, 2009; Saad-Filho, 2010). Rhetorically, this was also a neoliberal time regarding the prospects of welfare state development with a strong emphasis on issues such as privatization, marketization, retrenchment and increased individual responsibility. International organizations such as the OECD led the way, and in Europe, governments such as the one in the UK and the ones in Central and Eastern Europe adopted this new policy paradigm. On the ground, however—seen from the perspective of social citizenship rights and obligations—the commitment to state guaranteed entitlements survived and was gradually expanded. With the 2000s a new welfare state settlement entitled the social investment state emerged with an emphasis on active citizenship and the productive citizen.

At closer look, developments have diverged among different welfare regimes and among different policy areas. Western Continental and Southern Europe have proven most resilient to change, while the opposite is true for the Scandinavian and Atlantic regimes; but they have all, including Central and Eastern Europe, expanded their public commitment to safeguarding the welfare of citizens. Yet, the development has been uneven among policy areas. Seen from the perspective of entitlements, health care is a public matter in Europe, and in Southwestern Europe, it became so during the era of neoliberalism; however, the introduction of the so-called new public management governance techniques imported from the market sector was introduced. Regarding old age pensions, rights have been expanded and have remained a collective, non-market regulated area, even when elements have been commodified. The same goes for care services for the elderly, albeit many of these are now delivered by the private sector working under contract with local and regional authorities. Family policies, especially policies enabling a better balance between family and work, have been expanded significantly except in Southern Europe, while unemployment insurance and social assistance programs have been cut significantly. This uneven development explains, in part, why the social science literature has been in such disagreement about welfare state development under neoliberalism and beyond as the focus has been on different policies during different times and in different places.

Given these different developmental trends regarding time, space and policy it is no easy task to try and summarize the state of the art of the contemporary European welfare state, but some generalizations shall be offered. International organizations are no longer advocating a neoliberal approach to state intervention, but that has not meant a return to the post WW II social settlement. Instead the social investment state is being promoted and implemented with its emphasis on the productive and active citizen.

As we learned from Frericks, Maier and de Graaf (2009: 152), citizenship is, "…not defined in terms of acquired status, but as the possible or actual differentiated contribution to society". (For an alternative interpretation of active citizenship, see Haahr, 1997: 8; Jansen, Chioncel, Dekkers, 2006) So-called activation policies feature prominently in this new welfare state architecture; originating in Sweden this approach has now spread to most, if not all, European states and beyond. It has meant a significant change of scope concerning unemployment and social assistance benefits by focusing on the employability of the individual unemployed citizen instead of only compensating for his or her income loss. Ideally, activation strives at enhancing the qualifications of unemployed individuals by providing them with some kind of job training or education; but by doing so, it, in reality, tests their employability and sorts them out accordingly. Hence, activation acts as a tool of marginalization by sorting the unemployed into various categories of invalids: long-term sick, handicapped, disabled, etc. to the extent the individuals in question do not succeed with their activation measure. Furthermore, activation is obligatory, and one loses the right to their benefits if an offer is refused. This has led to the so-called scare or motivation effect being the most significant effect of activation: when claimants approach the date for going into activation they strongly increase their job search and significantly lower their job expectations regarding the sector, pay, and distance to work etc. To a large extent, they do find employment; however, it is usually much below their otherwise expected level and standard.

Thus, one price that has been paid for the active turn in social policy and the productive citizen is a high degree of marginalization of various categories of people such as ethnic minorities, youth, people with disabilities, etc. Processes of marginalization are accompanied by strong trends toward a dualization of welfare entitlements and provisions with relatively generous benefits for the well-integrated productive middle class citizens on the one hand, and on the other hand, reduced and punitive provisions for the increasing number of marginalized people.

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