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Politics, economy and society: The performance profiles of 43 countries and 6 welfare regimes

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1. Performance criteria for the international comparison of living conditions[1]

In the following, an attempt is made to trace the performance of societies according to societally (or socially) desirable goals in part back to the welfare logic of the regime type, the guiding principles of the policies and the correspondingly designed institutions. As a systematic starting point the three worlds of welfare production of Esping-Andersen (1990) are chosen and extended by me to a differentiation in (at least) six different welfare logics, which are reflected in different modernization paths.

In case studies, 43 countries (including all emerging economies) are examined with regard to their welfare. These societies are then examined to what extent they show models of good life. As welfare I understand, in the context of the social-philosophical discussion, the performance with regard to the following eight values respectively goals (see chapter 1): prosperity; ecological sustainability; innovation; social protection by means of social support in the case of risk as well as precautionary by means of investment in education; recognition of peculiarities (women-friendliness and migrant-friendliness); equality of participation; social integration; autonomy (freedom of choice and capabilities). I regard all these as societally desirable goals. – The performance of prosperity and welfare will be analysed up-to-date in the context of the global financial crisis and the following great recession.

In my approach, I do not assume a uniform path of modernisation towards growth, participation and inclusion, but distinguish for the countries considered (among others all EU countries) – in extension of the "three worlds of welfare capitalism" by Esping-Andersen (1990) – the social-democratic-universalist path, the economically liberal path, the status-preserving path, the familistic path and the development of the group of post-socialist countries that are in a process of differentiation (see chapter 2). I consider four Scandinavian countries, seven Continental European countries, six Anglo-Saxon countries, six Southern European countries, thirteen Eastern European countries, Turkey, Japan and South Korea, Brazil and South Africa as well as China and India.

In each country case study, I examine the following institutions: political regime, economy, gender roles, social security systems (pension, health, labour market, family) and education. According to the institutional logics, the type of welfare regime and the development trend are elaborated. In addition, the similarities and differences between the countries and welfare regimes are characterised. In order to answer how well these societies function, the performance of the institutions is examined with the help of selected indicators

[1] The following work summarizes a part of the results of the study: Dieter Holtmann: 43 Country Case Studies on the Performance of Politics, Economy and Society. Aachen 2018: Shaker Verlag. 608 pages.

and indices (see chapter 3 to 12). Finally, the conclusions are drawn from the overall analyses (see chapter 13).

Concepts of welfare and quality of life

Welfare includes, on the one hand, the individual quality of life, and on the other hand, the public infrastructure.

While the *individual quality of life* was formerly conceived in the Swedish model of welfare research precisely in terms of resources, meanwhile a broader understanding has been proposed, see for example "Having, loving, being: An alternative to the Swedish model of welfare research" by Allardt (reprinted in Walnut/Sen 1993). A relevant accentuation was proposed by Sen, Nobel laureate in economics: You must have capabilities (competences and capacities), to actually realise formal opportunities of freedom of choice (see Sen 1993: Capability and Well-Being).

In international comparisons, since Esping-Andersen 1990 the *public welfare* is mostly conceived, in emphasising the importance of institutional development paths, in the form of different *welfare regimes* that contain different welfare goals and levels of public assistance. As ideal types, a distinction is made between a encompassing social-democratic-egalitarian Scandinavian welfare regime, a status-conserving continental welfare regime, and an economically liberal welfare regime with need-tested poor relief.

For the international comparison of welfare and quality of life, the United Nations create an annual "Human Development Report", in which all nations of the world are compared with respect to human resources, productivity, equality, sustainability, and capability. However, due to the multitude of nations observed, many subtle differentiations in the developed countries are not considered.

To capture the *subjective* evaluation of welfare and quality of life, the concept of general life satisfaction and satisfaction with specific areas of life has been developed, which are collected with the help of the methods of empirical social research.

On the issue of performance of welfare regimes

How societies organise and institutionalise welfare, expresses its fundamental values about living together in a desirable way. To emphasise that societies follow certain sociopolitical programs for certain periods of time, in the following the concept of *welfare regimes* (see Esping-Andersen 1990) is used. In order to compare the performance of societies in terms of welfare, criteria of social welfare are developed on the basis of a discussion of socio-philosophical "moral values" (see Goodin et al. 1999). In the following the performance of 43 countries with respect to the selected criteria will be discussed.

Performance criteria for the comparison of living conditions

Goodin et al. (1999) and Merkel (2001) have each worked out criteria by which they want to assess the performance of welfare regimes. Goodin et al. (1999) suggest six moral values without ranking, Merkel five criteria of distributive justice, the numbering expresses his priority (see Table 1-1).

To illustrate potential goal conflicts, I have proposed four polarities in each case between two societally (or socially) desirable goals which are displayed in a star diagram (see Figure 1-1). The goals were all formulated positively; e. g. the antithesis to universalism is the recognition of particularities, which is why a simple equal treatment between groups with different preconditions is not appropriate.

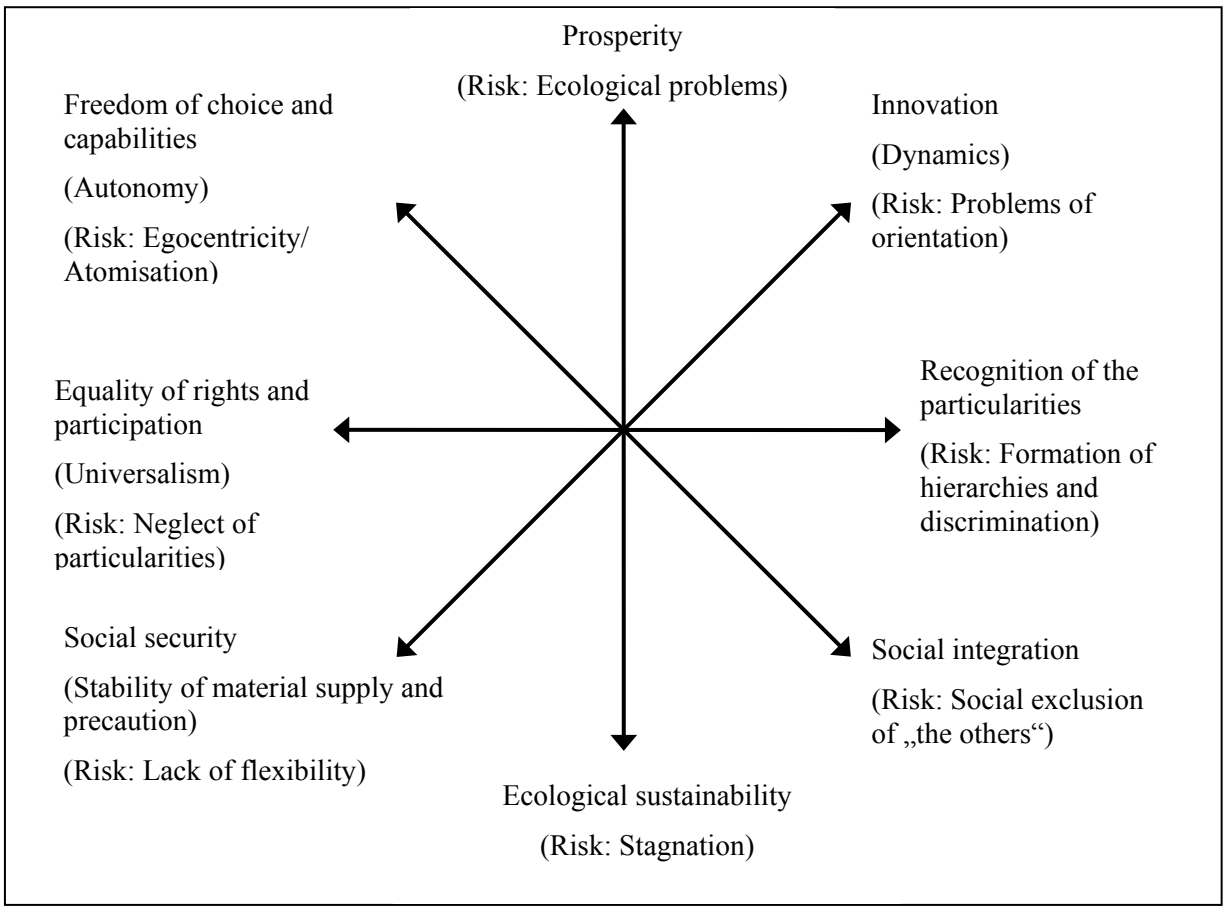
Table 1- 1: Moral values and criteria of social welfare

Goodin et al. (1999): 6 moral values	Merkel (2001): 5 goals of distributive justice
Promoting economic efficiency	4b) Activation through the welfare state
Reducing poverty	1) Preventing poverty
Promoting social equality	5) Reducing the income and wealth spread
Promoting social integration and avoiding social exclusion	3) Inclusion in the labour market
Promoting social stability	4a) Social security by the welfare state
Promoting autonomy	2) Education and training

That there are trade-offs, does not mean that it would be impossible to achieve the goals simultaneously. E. g. the amount of consumption is constantly creating a similar amount of garbage, but one can also develop strategies to reduce or avoid the ecological burdens or to work on it with the help of technology.

Figure 1-1: Societally desirable goals and criteria for welfare

(Projection of eight moral values in a two-dimensional representation)



Model: Dieter Holtmann

Prosperity as well as *ecological sustainability*

Goodin et al. notice themselves that "economic efficiency" is rather "morally agnostic" (1999: 15). In the footnote 5 (p. 26), they refer to "material well-being" as the actual welfare goal. Accordingly, we would start from the goal of the material well-being, which is shortly measured by the economists as the gross domestic product per capita. There is a tension between quantitative growth of prosperity on the one hand and ecological sustainability on the other hand.

Innovation and *social security (Stability of material supply and prevention through education)*

Due to permanent new challenges, innovation is also an important criterion, since the relative wealth is based on the relative productivity compared to others. Therefore investments in research and development play a crucial role.

While the aspect of innovation is missing in the discussions of Goodin et al. and Merkel, they refer to the opposite pole, the social stability. The social security systems provide a stabilisation of income in case of illness, unemployment, old age etc. and the education system prevention (or precaution) through education.

Recognition of particularities as well as *equality of rights and participation*

Goodin et al. and also Merkel formulate the avoidance or reduction of poverty as an independent goal, which is on the other hand implicitly included in the goal of equality. Poverty is understood as relative poverty, namely relative to the average citizen.

The antithesis to universalism of equal rights and participation is the recognition of the particularities, which is why a simple equality of treatment between groups with different preconditions is not appropriate. The recognition of the particularities is not addressed by these authors, but plays an important role in the current discussions about the recognition of different cultures, orientations and lifestyles.

Social integration as well as *freedom of choice and capabilities (autonomy)*

Goodin et al. define the boundaries of the kinship as those for which one has to take care of. The concept of support networks seems suitable because it resumes family, friends, neighbours, etc.

Merkel considers the inclusion with respect to the labour market as an important means of social integration. Unemployment on the other hand affects self-esteem and the ability to act.

To the permanent integration into family networks one could view autonomy as an opposite pole. Freedom of choice can be better realised if one had the appropriate capabilities (Sen 1993) that would enable citizens to actually seize the opportunities of formal freedom of choice.

Investments in human capital are central, since they enable individuals to better understand and deal with problems. This capacity to act has a preventive effect on potential hazards.

I consider these eight goals all as remarkable. Given the multidimensional nature of the problems I would renounce a prioritisation between these goals, since decisions should be made in due consideration of the context.

In the following chapters, the performance of 43 countries and – in summary – the different welfare regimes with regard to these eight socially desirable goals or welfare criteria is examined empirically.

Operationalization of the performance criteria

In order to discuss the performance of welfare regimes, eight societally desirable goals and nine performance criteria were developed. As overview, the indicators, with which the goals have been operationalized, are compiled here:

Prosperity

- Standard of living (GDP p.c.)

Ecological sustainability

Level of ecological strain

- CO_2-emissions p.c.
- Waste load p.c.
- Nuclear energy share

Relief strategies

- Energy efficiency
- Regenerative energy (substitution)
- Sustainable agriculture (sufficiency)

Innovation

- Private expenditures on research and development
- Public expenditures on research and development
- Internet users per inhabitants
- Important (triadic) patents

Social security

- Precautionary: through public and private education expenditures
- After-care: through expenditures of the welfare state

Women-friendliness (recognition of peculiarities)

- Women's share in parliament
- Share of female students
- Women's employment quotient
- Women's income quotient

Migrant-friendliness (recognition of peculiarities)

Openness for migrants

- Population share of migrants
- Naturalization rate

Participation of the migrants

- Discrimination with regard to unemployment
- Relative discrimination in reading competency

Equal participation

- Educational poverty: Early school leavers
- Educational poverty: "readers at risk"
- Income poverty: 60 % line
- Income inequality: Gini index

Social integration

Economic integration

- Activity rate
- Unemployment rate

Personal integration

- Support networks
- „Count on help“

Integration in the civil society

- Participation in political events
- „Opinion to official“
- Trade union membership

Autonomy

Objective autonomy

- Public and private expenditures on education as investment in skills
- Population share with tertiary education
- Mean reading competency (PISA)
- Share of top readers (PISA)

Subjective autonomy (as a percentage of the population)

In the following chapters, the performance of the considered countries and the different welfare regimes are examined empirically with regard to these eight welfare criteria. The operationalisations and the results of the countries for the various performance indicators and indices are extensively documented in my international comparison: "The wealth and welfare of nations in change" (Dieter Holtmann, Aachen 2017: Shaker Verlag. 268 pages) and in: Potsdamer Beiträge zur Sozialforschung No. 38.

Further structure of the book

In the following chapters, the following welfare regimes with different logics are distinguished: the social-democratic welfare logic is characterised by a universalistic claim to welfare benefits on the basis of citizenship. In case studies of Sweden, Norway, Denmark and Finland, the specific features of the institutional structure of these countries are elaborated (see chapter 3).

In each case study, the following institutions are considered: the political regime; the economy; the gender roles; the social security systems with the aspects of pension, health, labour market and family; education. On this basis the (dominant) regime type for each country and, where possible, the main development trend are elaborated.

The similarities and peculiarities of the countries are presented as well as their performance with regard to the socially desirable goals, which have been formulated as performance criteria in advance.

The *conservative welfare logic* is defined by Esping-Andersen through the status-preserving character of the social security systems. In the present study, gender roles are also taken into account when determining the character of the welfare logic, i.e. whether the "male bread-winner model" or the "dual-earner model" dominates. Case studies are conducted for Germany, Austria, Switzerland, Belgium, Luxembourg, France and the Netherlands (see chapter 4).

The *economically liberal welfare logic* is characterised by needs-tested residual welfare benefits. Case studies are conducted for the USA, Canada, Australia, New Zealand, Great Britain and Ireland (see chapter 5).

The *familistic welfare logic* gives the family the primary responsibility for care work; the state provides only rudimentary welfare benefits. Case studies are being carried out for Italy, Spain, Portugal, Greece, Cyprus and Malta (see chapter 6).

The *post-socialist countries* have a similarity in the past, but are in a process of differentiation into different developmental paths. Case studies are conducted for Slovenia, the Czech Republic, Hungary, Poland, Slovakia, Estonia, Lithuania, Latvia, Romania, Bulgaria, Croatia, Serbia and Russia (see chapter 7).

Turkey is of particular interest as an applicant for EU membership. Therefore, Turkey is considered in a single case study (see chapter 8).

The *productivist welfare logic* is discussed with case studies for Japan and South Korea (see chapter 9).

The welfare regimes in *Latin America* are, at first, generally discussed, before Brazil is examined as the economically most important country in a single case study (see chapter 10).

For *Africa*, South Africa is examined as the economically most important country and as one of the BRICS states in a single case study (see Chapter 11).

As further countries in Asia, the largest countries on earth, *India* and *China*, with a population of more than one billion each, which are altogether also economic great powers despite the low standard of living, are each investigated in individual case studies (see chapter 12).

Finally, the results are summarised and some conclusions are drawn from the case studies on the production and distribution of welfare, with regard to the different welfare regimes, and on a system of continuous societal monitoring to assess the welfare of nations (see chapter 13).

2. Types of welfare regimes

2.1 The Three Worlds of Welfare Capitalism according to Esping-Andersen

In the modern classic for comparative welfare research "The Three Worlds of Welfare Capitalism" (1990) Esping-Andersen differentiates between three different logics of welfare regimes in the "triangle" of welfare production of state, market and family.

The regime-term is defined in Esping-Andersen as follows: "To talk of 'a regime' is to denote the fact that in the relation between state and economy a complex of legal and organisational features are systematically interwoven." (1990, p. 2)

In my view, the advantage of the regime concept is that one thus can discuss the continuity and the change of social and political programmes. Whether for example Thatcherism, which includes several government periods, was replaced by another welfare logic; i.e. if a path change took place and in which sense the new socio-political programme of "New Labour" was different.

In the "liberal" welfare regime type the market logic dominates, the balancing of the welfare state is more residual. Social support services are dependent on strict needs tests. A prototype of the liberal welfare regime is the USA.

In the "conservative" (meaning in Esping-Andersen: status-preserving) welfare regime type in the social assurance tradition the social benefits are dependent on

the contributions made previously and therefore on employment. Germany belongs to this type.

In the "social-democratic" welfare regime type, the principles of universalism and decommodification dominate: The compulsion to accept employment at any condition is reduced by the welfare state; the "commodity character" of the work force is reduced by wage replacement benefits. Sweden is the prototype of the social-democratic welfare regime type and the principle of universalistic welfare state at a high level of benefits was institutionalized by an alliance of the workers' movement with the middle classes.

In the first part of his book Esping-Andersen deals with the question of the causes for the various welfare regime types (welfare regime as a dependent variable). According to his institutionalist and class alliances approach Esping-Andersen elaborates on one hand historically, on the other hand with multiple regression analysis (18 countries) that in countries where Catholic and absolutist traditions had a greater weight, the formation of the "conservative" regime type was favoured. In countries where the labour movement was relatively weak – such as in the immigration country USA – the emergence of a "liberal" welfare regime type was favoured. In countries where the workers' movement dominated, the emergence of a "social-democratic" welfare regime type was favoured.

In the second part of his book Esping-Andersen elaborates the consequences of welfare regimes (i.e. welfare regimes as independent variables).

Esping-Andersen shows that the various types of welfare production also correspond to different types of service societies: In the "liberal" welfare regimes business service and consumer service are very developed, in" social-democratic "welfare regimes the social service (health, education and welfare) is especially developed. In the "conservative" welfare regimes neither the private nor the public services are very developed, so that employment remains well below what is possible, with the corresponding follow-up problems for the financing of social security systems.

2.2 Political regimes, production regimes and welfare regimes

Soskice has proposed to differentiate production regime, which should characterise the types of coordination of business (see e.g. B. Soskice 1999). The uncoordinated (in my formulation: economically liberal) market economies with the US as example contrasts with the coordinated, which Soskice subdivides into the nationally coordinated with negotiations between the tops of the employers' and workers' organisations with Sweden as an example and sectorally coordinated production regimes with Germany as an example, where the social partners negotiate at sector level. Another form of coordination can be found in Japan, where a ministry is responsible for coordinating the basic technology policy of enterprise groups. I would differentiate, as a further production regime, the state socialist or state capitalist, in which the planned

economy or market economy is organized by the ruling party. Kitschelt et al. (1999) already pointed out that typical production regimes correspond to specific party systems and certain types of class compromise.

Using the class alliances approach, which e. g. is used by Esping-Andersen, I would suggest for these three structurings the following causal order: The paths of development of class alliances structure the development of the production regimes, and the development of political regimes and production regimes in turn structure the development of welfare regimes (see table 2-1). The table is structured by the two polarities of guiding principles in the two diagonals. Economic freedom of enterprise versus security through state supply and autonomously acting individuals versus social security by belonging to the family or clan.

Through a successful alliance with the middle classes the Social-Democracy won hegemonic influence in Sweden and reached, after the Second World War, the expansion of the universalistic welfare state with a high level of social security.

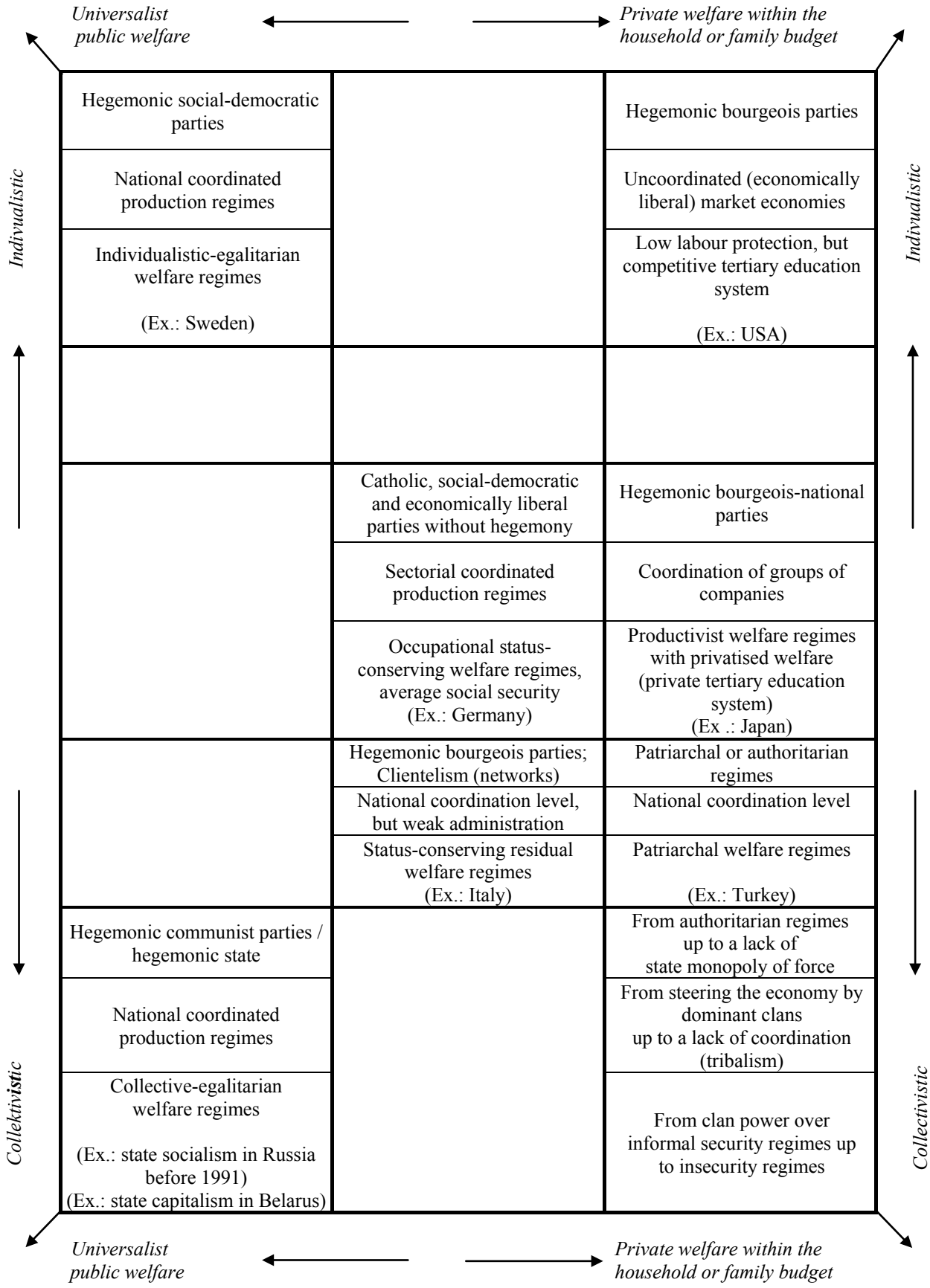
In the immigration culture of the United States there were so many cultural cleavages that the trade union movement was not as strong to avert the hegemony of the bourgeois parties. With the individualistic attitude that everyone has to take its own responsibility to use the development opportunities, and trusting in the efficiency of the market, the welfare was conceived as a residual: Only after a strict means test welfare benefits should be granted.

In the Federal Republic of Germany the Bismarckian social assurance system had laid the early foundation that the social security systems preserve the status achieved in the employment system. After the Second World War the social market economy was expanded under Christian Democratic influence, which was complemented by social-democratic influences. Since the employers' and workers' organisations were both strong, neither the employer nor the employee side could enforce a radical policy option, which is why more likely intermediate solutions prevail, in the occupational welfare regime e.g. an intermediate level of social protection.

In the Japanese case the bourgeois parties dominated and developed a national co-ordination of enterprise groups by a corresponding ministry. Since the companies took already care for the social security of their core workforce, the state welfare remained residual. The additional safeguards must therefore be shouldered by the families.

In Italy also clientelistic party networks are relevant, the coordination by the state was expanded after the Second World War. Again, the families are important as welfare providers.

Table 2-1: Political regimes, production regimes and welfare regimes



Hegemonic social-democratic parties		Hegemonic bourgeois parties
National coordinated production regimes		Uncoordinated (economically liberal) market economies
Individualistic-egalitarian welfare regimes (Ex.: Sweden)		Low labour protection, but competitive tertiary education system (Ex.: USA)
	Catholic, social-democratic and economically liberal parties without hegemony	Hegemonic bourgeois-national parties
	Sectorial coordinated production regimes	Coordination of groups of companies
	Occupational status-conserving welfare regimes, average social security (Ex.: Germany)	Productivist welfare regimes with privatised welfare (private tertiary education system) (Ex .: Japan)
	Hegemonic bourgeois parties; Clientelism (networks)	Patriarchal or authoritarian regimes
	National coordination level, but weak administration	National coordination level
	Status-conserving residual welfare regimes (Ex.: Italy)	Patriarchal welfare regimes (Ex.: Turkey)
Hegemonic communist parties / hegemonic state		From authoritarian regimes up to a lack of state monopoly of force
National coordinated production regimes		From steering the economy by dominant clans up to a lack of coordination (tribalism)
Collective-egalitarian welfare regimes (Ex.: state socialism in Russia before 1991) (Ex.: state capitalism in Belarus)		From clan power over informal security regimes up to insecurity regimes

In the countries where communist parties won hegemony (as in Russia, China, etc.), planned economies have been developed, in which the party leaderships put through egalitarian schemes. Meanwhile, different variants of a state-dominated capitalism have been developed in Russia and China.

Finally, theocratic regime (such as Saudi Arabia), where church and state are not segregated, make the antithesis of a model of autonomously acting individuals (such as in Sweden). Turkey is a society that is developing in the field of tension between modernisation, division of powers, separation of church and state etc. and theocratic tendencies.

Below, the Federal Republic of Germany is empirically compared only with developed societies and with the BRICS countries[2].

2.2.1 Six ideal types of welfare regimes

As an extension of Esping-Andersen (1990) I distinguish six ideal types of welfare regimes (see table 2-2). In addition to the social-democratic regime with prototype Sweden the economically liberal regime (Esping-Andersen: "liberal") with prototype United States and two variants of the (in the terminology of Esping-Andersen) "conservative" regime are differentiated: The continental occupational regime retains the status of employment in the social insurances, e.g. is status-conserving, prototypes are the Federal Republic of Germany or Austria. In the familistic regime of Southern Europe, in addition to the status-preserving aspects the family plays an even more important role as a safety net in view of the residual state safeguards (see Ferrera 1996, 2005).

I want to extend the term "conservative" beyond the aspect of "status-preserving" (Esping-Andersen), what in my opinion also solves some classification problems. Esping-Andersen argues with three "stratification dimensions": conservatism, liberalism, socialism. The Netherlands then have an affinity to "socialism" and Switzerland to "liberalism". On the other hand Esping-Andersen considers the triangle of welfare production through state, market and family. If one acknowledges to the gender roles the importance they deserve, then the employment of women in the Netherlands, where the merchants invented the housewife model, has in fact risen, but to a large extent as part-time work, women still take over the major part of care work in families. In this sense, the Netherlands belong to the conservative welfare regime of Continental Europe. Accordingly, Switzerland, which introduced women's suffrage in Europe the last, with its division of labour between the sexes can be assessed as part of the conservative welfare regime of Continental Europe.

---

[2] The less developed countries could be differentiated according to Gough and Wood (2004) in "Informal security regimes" (safety on the basis of personal relationships) and "Insecurity regimes" (uncertainty dominates).

Esping-Andersen rightly claims to overcome a one-dimensional approach to welfare research, but not because of the concept of "decommodification", which as measure of the generosity of the welfare state is an improvement over the share of the GDP for social spending (the latter also depends on the scale of the problems) which e.g. could be observed after German reunification, but is still one-dimensional. But with the triangle of welfare production through state, market and family as well as with the three stratification dimensions Esping-Andersen has introduced a fruitful multidimensional concept, which is expandable. To emphasize the explanatory power of the approach, I would increasingly use the concept of the welfare logics of the regimes. As to the regimes, it is by now appropriate in view of the further development of the discussion to distinguish (at least) six welfare regimes.

While work in the social-democratic regime shall be organised in solidarity and greater equality shall be pursued through government redistribution, the prior goal of the economically liberal model consists in efficiency, which shall be achieved through market competition. The conservative occupational regime with its social market economy ranks on these dimensions in between. The coordination of the economy is left to the market in the economically liberal regime, while the state intervenes more strongly by regulation in the familistic regime and coordinates as a mediator between the corporations in the social-democratic regime. The occupational regime with its right to free collective bargaining ranks in between. As can be seen at the system of taxation, in Sweden the individual stands at the centre, in contrast to the South where the family comes first. While the economically liberal model is individualistic too, in the social-democratic model the individuals are further supported by a social safety net. In the conservative occupational model the wages are stratified by professional and by marital status, which is similar to the southern regime type.

The model for gender roles in the more traditional parts of Southern Europe are complementary role constructions. As partial modernisation of the male-breadwinner model one can interpret the dissemination of part-time employment of women, which is even more common in the Netherlands than in Germany. In the economically liberal regime the guiding principle of "gender neutrality" dominates, the state shall not intervene in the privacy, while in the social-democratic regime the state promotes the "dual-earner model" e.g. by individual taxation. As dominant values concerning social security, one finds care by family, church and the residual state in the more traditional parts of the familistic countries in Southern Europe. In the conservative occupational regime these values are complemented by charities, whereat the families are first responsible according to the subsidiarity principle. In the economically liberal regime one relies first on voluntary assistance, and a residual relied from the state is granted only after a needs- and means-test. In the social-democratic regime, however, the responsibility for social security is assigned to the state.

Table 2-2: Six ideal types of welfare regimes

	Ideal types					
	Familistic	**Conservative**	**Economically liberal**	**Social-democratic**	**State socialism; state capitalism**	**Productivist/ Asian capitalism**
Political regime	Hegemonic bourgeois parties; clientelism (networks)	Catholic, social-democratic and economically liberal parties without hegemony	Hegemonic bourgeois parties	Hegemonic social-democratic parties	Hegemonic communist party; hegemonic state	Hegemonic bourgeois-national parties
Dominant values as to work/economy	Market economy and familial integration	Social market economy	Liberty and efficiency through market concurrence	Solidarity and equality through redistribution	Right to work and duty to work	Productivism
Production regime/ coordination of the economy	State coordination	Sectoral coordination; in GER collective bargaining of trade associations	Coordination through markets	State as mediator between the corporations; national coordinated.	State planning	National coordination of the leading enterprises
Dominant values as to individual/ community	Family members	Individuals in families/households	Autonomous individuals	Autonomous individuals with social safety net	Member of work collective	Member of work collective and of families
Model for the gender roles	Differing, complementary role constructions	Breadwinner model; women possibly as part-time	Gender neutrality; the state does not intervene in the privacy	Dual-earner model	Dual-earner Model	Differing, complementary role constructions
Dominant values as to social security	Care through family, church and the residual state (subsidiarity)	Care through family, church, charities and the state (subsidiarity)	Volunteer help and needs-test by the residual state	The welfare state is responsible for social security.	The state is responsible for social security.	Families and enterprises are responsible for social security.
Central welfare institutions	Family	Social assurances	Market	Welfare state	State social assurance (plus price subsidies)	Families and enterprises
Funding	Contributions, family	Contributions	Private and residual from the state	By the state via taxes	By the state	Contributions, family
Basis of the claim	Member of a family	Dependent on employment	Citizen	Citizen	Dependent on employment	Member of a family and an enterprise

Continued from Table 2-3:

Criterion for the claim	Need	Contributions	Means-test	Universalistic, right of citizens	Contributions	Need (as to family) and membership (as to enterprise)
Extent	Residual	Medium size	Residual	Encompassing	Encompassing for employees	Only for core work-force; altogether low
Kind of benefit	Personal service (family)	Financial transfers	Financial	Paid social services (predominantly in the public sector)	Transfers and services	Personal service (family) and financial (core workforce)
Number of pension schemes („Corporatism“ in the sense of E.-A.)	6-12	6-12	1-2	2 (Private and public sector)	Unified system	6-12
Private expenditures for health (as % of total expenditures) („Liberal“ in the sense of E.-A.)	(Ca. 10 %-20 %)	(Ca. 20 %-30 %)	Ca. 30 % and more	Ca. 10 % and more	The state is responsible.	Ca. 30 % and more
Equality of benefits (Basic/Maximum) („Socialism“ in the sense of E.-A.)	(Ca. 50 %-70 %)	Ca. 50 %-70 %	Ca. below 50 % (USA: 22 %)	Egalitarian Ca. 70 %-100 %	Egalitarian	0,32 (i. e. inegalitarian)
School years until the first selection	Late differentiation (predominantly)	Early differentiation	Late differentiation	Late differentiation	Late differentiation	Late differentiation
Share of private educ. expend. (as % of total exp.)	Low to medium size	Medium size	High size, but competitive tertiary education system	Low size	(Regulation by the state)	High size: private tertiary education system
Prototypes	Italy	Germany	USA	Sweden	Russia before 1991; Belarus	Japan

Model: Dieter Holtmann

Accordingly, the central welfare institutions are the family in the more traditional parts of the South, social assurances in the conservative occupational regime, the market in the economically liberal regime and the welfare state in the social-democratic regime.

Esping-Andersen (1990, p.70) measures "conservatism" as a dimension of stratification among others through the occupational particularism as it is reflected in the number of pension schemes ("corporatism"). The conservative and the familistic countries have the strongest degree of particularism, the highest number of pension schemes is found in Italy (12), followed by France (10), Austria and Japan (both 7) and Germany (6). In social-democratic Sweden there is a distinction between the private and the public sector (hence there are 2 schemes), but also the economically liberal countries Australia, New Zealand and Ireland belong to the universalist pole, there is even only one pension system. However, in the economically liberal countries the general level of social security is on average significantly lower than in the social-democratic countries.

In the more traditional parts of the South, funding of social security is provided partly by contributions and partly by the family. The conservative occupational regime is funded by contributions from employers and employees. The economically liberal residual regime is partly privately funded, and partly by state. In the social-democratic regime the welfare state is responsible for funding of social securities, which is realized on the basis of a high taxation of the citizens.

Esping-Andersen (1990: 70) measures (economic) “liberalism" as dimension of stratification among others by the private share of total health expenditures. With 57 %, the economically liberal USA has the highest share of private financing. At the other pole, social-democratic Norway exhibits only a share of 1 % private funding. In the familistic countries health care is predominantly funded by the state, accordingly one finds in Italy a private share in funding of only 12 %. The conservative countries range in the middle, Germany e. g. has a private share in funding of 20 % (according to the measurement of Esping-Andersen 1990).

Citizenship is the basis of the right to social security in the social-democratic welfare regime; this also applies to the economically liberal regime, however at a significantly lower level of social security. In the conservative regime, the level of social security is stratified by employment status. In the more traditional parts of the South, the family adopts the role of safety provider. Criteria for security claims are citizenship (legal resident) in the social-democratic regime and contributions in the conservative regime. In the familistic regime, need is the criterion for security entitlement, in the economically liberal regime, at first it is checked whether the needy has no own resources (means-tested). The extent of social security is encompassing in the social-democratic welfare regime,

whereas it is only residual in the economically liberal and in the familistic regimes.

"Socialism" as a dimension of stratification is measured by Esping-Andersen (1990, p.70) among others through the equality of benefits, indicated by the ratio of the basic benefit to the maximum possible. In this sense universalistic are the social-democratic countries (Denmark 99 %, Sweden 82 %), but also the two liberal countries Australia and New Zealand (100 %). However, in Sweden and Denmark ca. 90 % of the population have access to the security system, while this is the case for only about 33 % of the population in Australia and New Zealand. The level of social security in the conservative regime ranges between the social-democratic and the economically liberal. While in the social-democratic welfare regime, the social security benefits are provided especially in the form of social services, the benefits in the conservative regime consist mainly in financial transfers. In the economically liberal model, there are e. g. soup kitchens as a service from the charities and only residual financial benefits by the state.

If in addition to the after-care benefits one takes into account the preventive educational institutions, so there is also the question of the key differences in the logics of the education systems. An important characteristic of the conservative welfare regime is the early selection (generally at the age of 10-12 years) in pathways with varying educational perspectives. Both the social-democratic and the economically liberal welfare regime focus, in a more universalistic way, on late differentiation, which according to the results of the PISA studies results on average in significantly better performances. On the other hand in the economically liberal countries, educational opportunities are structured by the high private investments in education. In the social-democratic welfare regime, this plays only a minor role, so that by these two criteria taken altogether, universalism on the educational dimension is most pronounced in the social-democratic countries.

In the familistic welfare regime, social assistance is provided rather in the form of personal services. Ferrera (1996, 2005) points out that in the South, on the one hand the social insurances stand in the Bismarck tradition – that is why Esping-Andersen assigns them to the conservative type – ,but on the other hand, health care is provided by the state and thus more in line with the Beveridge tradition. According to Ferrera (2005), the role of government is generally rather weak in the South, because the family has important functions, because of the large informal economy and because of the weak administrations. Because rational administration is weakly developed, clientelism (services in exchange for party support) and patronage (preferential treatment, corruption) play a greater role in Southern Europe.

The "post-socialist countries" in Central and Eastern Europe have in common the state socialist past, insofar they are treated in the following provisionally as

the fifth group of countries; however, these countries are in a process of differentiation into various subgroups. The Eastern European candidate countries for the EU have already removed from the state socialist welfare regime. But there are also countries like Belarus, which have maintained the authoritarian regulation by the state, even though they have adopted the right to private ownership of means of production. Therefore Korosteleva (2007) characterised Belarus as state capitalist. China is another interesting hybrid form, where a Communist Party still regulates in a political authoritarian way, but at the same time has initiated a strong economic dynamism by means of the market mechanism and promoted by many domestic entrepreneurs, which King/Szelényi (2005) characterise as "capitalism from below". In contrast, King/Szelényi see e. g. in the case of Russia a "capitalism from above" with few domestic entrepreneurs and lower dynamics. The Eastern European EU accession countries are characterised by King/Szelényi as liberal systems, in which foreign capital plays a greater role than the domestic capital and where there is some economic dynamism. The performance of these countries beyond mere economic growth will also be studied in detail below.

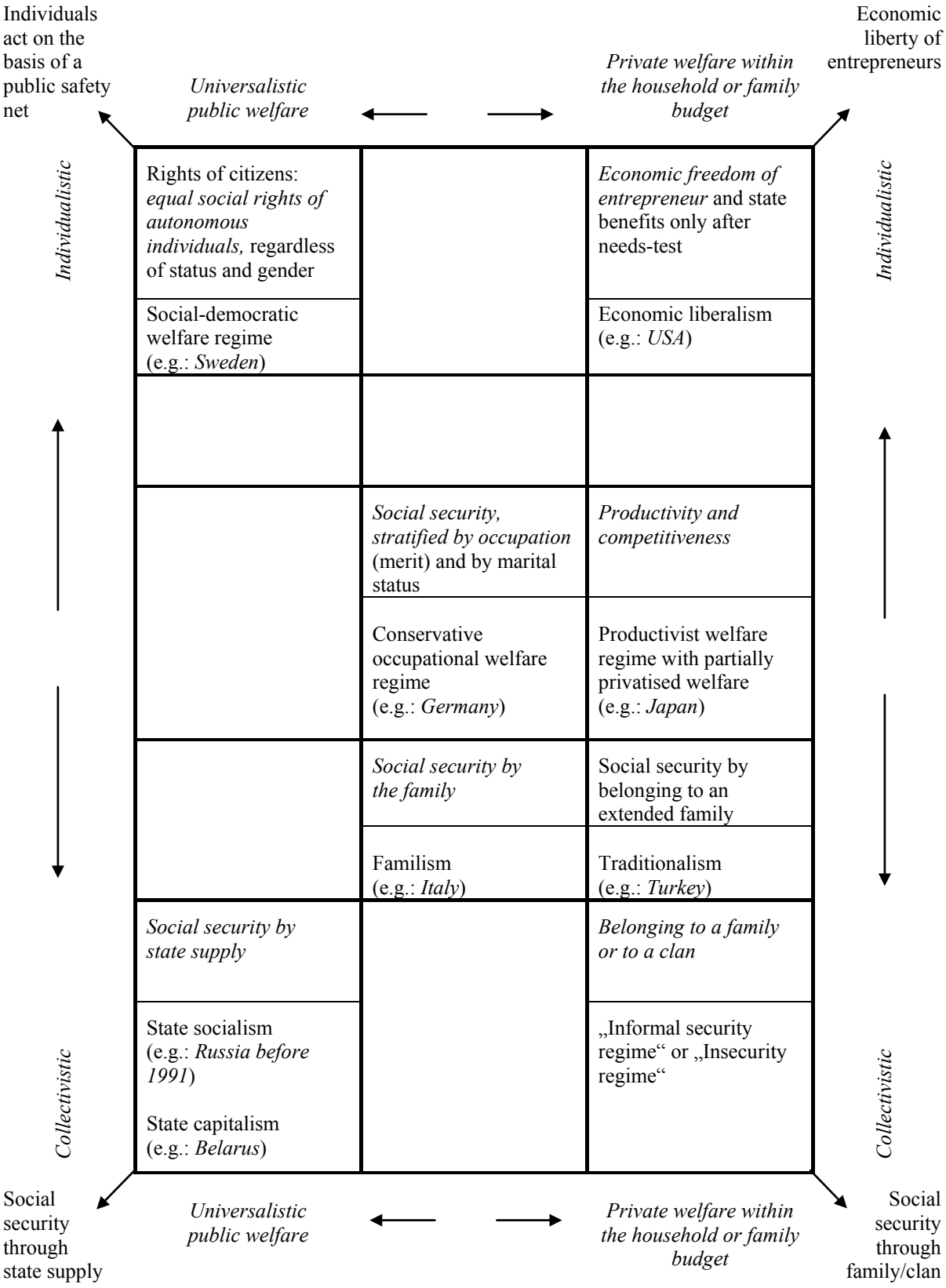
As sixth ideal type I distinguish the "Asian capitalism", which is characterised by Amable (2003) in particular by the predominantly private tertiary education system, while in the liberal Anglo-Saxon type the tertiary education system has high enrolment rates and is competitive. Hence, Lane (2007) characterises this type as "privatised welfare". In the context of comparative welfare research, the term "productivist" seems to me best suited to characterise this welfare logic, in which success on the world markets is aimed at through conscious technology development to promote economic rise. Concerning the "productivist" welfare regime, in the following the institutions and the performance of Japan and South Korea are analysed.

2.2.2 The value basis of the welfare regimes

The following Table 2-3 is structured by the two polarities in the two diagonals: *same social rights of autonomous individuals* versus *social security by the family* and *economic liberty of entrepreneurs* versus *social security through state supply*.

In the social-democratic welfare regime equal social rights, regardless of status and gender differences are established as rights of the citizens (citizen: legal resident). In the conservative occupational welfare regime social security is stratified in particular by occupation, corresponding to the meritocratic ideas of justice, and in addition by marital status.

Table 2-3: The value basis of the welfare regimes



In the economically liberal welfare regime, the economic freedom of entrepreneurs is the dominant value, social assistance benefits by the states are only granted after a means-test. In more traditional parts of Southern Europe, the family plays a greater role for social security, because the state benefits have only a residual size. For the "conservative" type according to Esping-Andersen (1990) one could judge France as a prototype of statism, since in France the regulation by the state traditionally plays a major role (see also Bonoli 2000).

If one considers beyond these Western welfare regimes also the East, so it can be judged as a counterpoint to the economically liberal regime: In state socialism social security should be supplied by the state. By now, a country such as China should rather be characterised as state capitalist, since on the one hand private property in the means of production was introduced, but the state party on the other hand still regulates the whole system.

Beyond the welfare regimes of the developed countries one can distinguish, according to Gough 2004, "Informal security regimes", in which a majority of the population must seek social security through personal networks, and "Insecurity regimes", where even physical security is not guaranteed.

Theocratic societies with lower level of socioeconomic development (such as e.g. Saudi Arabia) are not considered in the following empirical comparisons.

Turkey is developing in the tension between modernisation with division of powers, separation of state and church etc. and theocratic tendencies, which are getting stronger for some time.

The Japanese development concept relies heavily on the economic competitiveness on the global markets through systematic promotion of technology development and hence is often characterised as “productivist”.

2.2.3 The countries or groups of countries considered

In the following, models of good life in the sense of designing the framework conditions with the goal, that individuals can develop according to their ideas or interests in the best way, are discussed by analysing for the selected countries, to what extent they meet socially desirable goals. These goals have been worked out as performance criteria in advance, through a discussion of moral philosophy.

Germany is member of the EU, which is why all countries of the EU and prospective candidates are considered. Furthermore, in comparative welfare research the Anglo-Saxon countries (beyond Great Britain and Ireland) and the East Asian countries Japan and South Korea play a role as specific welfare models.

As economically important nations, all BRICS countries are taken into account, though they still have so many development problems, that they are not strictly comparable with the more developed countries.

Table 2-4: The 43 countries considered

Country	Australia	Austria	Belgium	Brazil	Bulgaria	Canada	China
Country code	AUS	AUT	BEL	BRA	BUL	CAN	CHN

Country	Croatia	Cyprus	Czech Republic	Denmark	Estonia	Finland	France
Country code	CRO	CYP	CZ	DK	EST	FIN	FR

Country	Germany	Greece	Hungary	India	Ireland	Italy	Japan
Country code	GER	GRI	HUN	IND	IRL	ITA	JP

Country	Latvia	Lithua-nia	Luxem-bourg	Malta	Nether-lands	New Zealand	Norway
Country code	LAT	LIT	LUX	MLT	NL	NZL	NOR

Country	Poland	Portugal	Romania	Russia	Serbia	Slovakia	Slovenia
Country code	POL	POR	ROM	RUS	SRB	SLK	SLV

Country	South Africa	South Korea	Spain	Sweden	Switzer-land	Turkey	United Kingdom
Country code	RSA	KOR	SPA	SWE	SWI	TUR	UK

Country	United States
Country code	USA

Altogether, 43 countries are taken into account, which play a special role in the investigation of the social structure of the Federal Republic in international comparison and in comparative welfare research as well as in the political context of the EU and its enlargement. In Table 2-4, the selected 43 countries are listed each with its country name and with a national, well recognisable code for the following pictures.

Through region, language and culture, discourse relationships and learning processes arise, which Castles has called "families of nations". Esping-Andersen (1990) distinguishes different welfare logics, the development of which could be partially explained with the concept of "families of nations". The fertility of the idea of the distinction between different welfare logics can also be seen in the fact that the various educational systems could be similarly classified in corresponding educational regimes. According to the different logics of welfare production, most countries can be relatively clearly assigned to one of the different welfare regimes:

Social-democratic: Sweden, Norway, Finland, Denmark

Conservative: Germany, Austria, Netherlands, Belgium, France, Luxembourg, Switzerland

The *Netherlands* are classified by Esping-Andersen (1990) as "social-democratic", but the cluster analysis of Esping-Andersen's data by Obinger/Wagschal (1998) places the Netherlands in immediate proximity to Germany. The analysis of Ostner (1995) and our own analysis suggest an allocation of the Netherlands to the conservative welfare logic: If in the triangle of welfare production - state / market / family – one takes greater account of the family, one remarks for example, that women in the Netherlands work mainly in part-time and, therefore, women have a relatively small share in the volume of paid employment, i.e. women reversely are more involved in the production of welfare in the family context.

Switzerland exhibits in particular conservative elements, which can be seen e.g. in the gender roles, on the other hand by its function in the international financial system also liberal and finally some social-democratic elements, because in the political model of consociational democracy the major parties are all involved in the government. However, according to our analyses of the institutions, by now the conservative welfare logic dominates on the whole.

Also in *Luxembourg* in addition to the status-conserving elements, one finds some liberal elements because of its function as an important investment place in the international financial system. But according to our analyses of the institutions, the conservative welfare logic dominates by far.

Economically liberal: USA, Canada, Australia, New Zealand, UK, Ireland

Ireland has the additional characteristic of being influenced by the Catholic Church. With regard to gender roles, Ireland is therefore more conservative than the other liberal countries. However, the economically liberal welfare logic dominates.

Familistic: Greece, Italy Spain, Portugal, Malta, Cyprus

Post socialist: Russia; Bulgaria, Romania, Slovenia, Czech Republic, Slovakia, Hungary, Poland, Estonia, Latvia, Lithuania; Croatia, Serbia

In this preliminary grouping due to the common state socialist past, Russia tends to be a border case, because in some developments (for example in the poverty rate) Russia falls behind the other Eastern European countries.

Productivist: Japan, South Korea

Japan: Japan is a mixed-type having both conservative and economically liberal characteristics. Amable (2003) characterises this as "Asian capitalism", where the welfare is in so far privatised, that the tertiary education system is financed privately in comparatively high degree. The welfare logic can be characterised as "productivist", because the economic rise shall be achieved through conscious technology promotion with successes on the world market.

Special cases:

Turkey: Turkey is i. a. as a candidate of the EU of particular interest. Due to the lower socio-economic development level, Turkey is examined as a special case.

South Africa: As a growing emerging market, South Africa is by now counted to the enlarged "BRICS" group. The residual welfare regime makes informal networks for social security necessary ("informal security regime").

Brazil: Brazil has a residual welfare regime with a very large informal sector (hence also: "informal security regime").

China: China exhibits the unusual combination of an ideologically communist government and a dynamic capitalist development.

India: In India, in the social security systems so far much is only programme, with a lack of implementation. There is a very large informal sector (hence also: "informal security regime").

The population size of the considered countries

With China and India, the two most populous countries in the world, each with a population of more than one billion (according to the UN for 2017), are considered, because they belong to the rising big economic powers. Of the Anglo-Saxon countries, the USA has by far the largest population, with 326 million inhabitants. Of the other BRICS countries, Brazil has the largest population with 211 million inhabitants, followed by Russia with 143 million inhabitants. Of the East Asian countries, Japan has a large population of 126 million. In continental Europe, Germany has the largest population of around 81 million inhabitants. Turkey has a similar large population of 80 million. In Southern Europe, Italy is the country with the largest population at 60 million. In Eastern Europe (after Russia) Poland has a large population of 39 million inhabitants. In Scandinavia, Sweden has the largest population with about 10 million inhabitants. However, the focus of this study is not on the weight of the population, but on models of good life from the perspective of comparative welfare research. The BRICS countries are considered due to their economic weight.

2.2.4 The structure of the country case studies

The case studies on the countries considered have the following structure:

Policy: The policy area of a country can be characterized by what are the main political institutions (polity), in particular, how the competencies to President, Prime Minister (Chancellor, etc.) and Parliament are distributed. The political contents (Policy) are bundled primarily by political parties in programs. The implementation of programs is reflected in the political process (politics) and eventually settled in regulations and in the modification of institutions and possibly in the creation of new institutions. The rhythm of the political process is highly structured through elections. – Under political regime I understand which political directions to enforce certain programmatic ideas dominate in a country or alternate. The advantage of the regime-term, then, is that one can thus discuss the continuity and the change of social and political programs. In Sweden, for example, the social democracy dominated for a long time, which was reflected in the national coordination of the economy, with the representatives of employers and workers, and in a universalistic and comprehensive welfare regime. – A first indication of the quality of democracy is provided by a Democracy Index.

The area of the **economy** can be characterized by the type of coordination: National, sectoral, enterprise groups in the sense of the production regime approach (varieties of capitalism by Soskice, Hall etc.). The sectoral structure of a country can be characterized on the basis of employment shares or the shares of the national product. If the industrial relations between employers 'organizations and workers' organizations allow conciliation as in Slovenia, more balanced social security systems can be negotiated. The ability to innovate is the best predictor of the expected average wealth of a society.

Ecological sustainability: The other side of high prosperity of a society with the associated consumption mountains there are corresponding (packaging etc.) rubbish heaps or general ecological impacts such as CO_2 - emissions, which are a key risk factor for climate change. On the other hand, the ecological burden can be limited and reduced through relief efforts.

With regard to the **gender roles** societies orient differently on the male-breadwinner model or the dual-earner model (according to Ostner and Lewis). The taxation system may e.g. aim more at the individual or at the family member. Social security can be focused independently on the individual or dependent on family members or, more generally, taking into account the family context. The gender division of labour in society is of great importance for the organization of care work and the extent of women's employment.

The **social security systems** can be analyzed in terms of underlying logics in the production and distribution of welfare in the welfare triangle of institutions, state, market and family according to Esping-Andersen (1990), who differenti-

ates the logic of universalism based on the same social civil rights, the economic liberalism with means-tested, residual benefits and the status-preserving social insurances in the Bismarck-tradition with benefits that are proportional to the contributions. Financing is accordingly more about taxes or rather by contributions from the social partners. Esping-Andersen measures the extent of the status-preserving corporatism among others by the number of different pension systems in a country (based on occupational groups, industries, etc.). The liberal welfare logic is operationalized among others by the share of private payments to the financing of pensions and the health system. The universalistic social-democratic welfare logic is measured by the share of the population with access to social services and by the equality of these services.

The expenditures of the welfare state contribute to the reduction of income poverty and income inequality.

As areas of social security I consider pensions, health, labour market and family.

Pension: In addition to the degree of corporatism (operationalized by Esping-Andersen through the number of pension schemes by profession / industry, i.e. particularism) the level of public spending on pensions as a percentage of GDP in international comparison is in particular relevant and the share of private expenditure in percent of GDP, the latter being a hint to economic liberalism in the sense of Esping-Andersen.

Health: The importance of health prevention and care for the population can be summed up in particular by the total expenditure on health as a percentage of GDP. The share of private payments in the total expenditures on health is an indicator of economic liberalism in the sense of Esping-Andersen.

Labour market: The level of wage replacement rate in relation to the international average shows the generosity of the welfare state aftercare in case of unemployment. The best calculation would take into account the conditions for receipt of benefits, as in the decommodification index by Esping-Andersen. Since this is a complex calculation, such data are often not available in actual form.

The combination flexibility / security shows an unfavorable orientation to labour market policy in Italy, where the insiders of the labour market are relatively well covered by employment protection legislation, while the unemployed are less supported and cared for, a more employer-focused orientation in the US, where the pressure to supply one`s labour is very high, because there is a practice of the "hire and fire" and humble benefits in case of unemployment, a more worker-friendly orientation in Sweden, where both employment protection including social security arrangements in the event of unemployment are well developed, as well as a particularly favorable orientation to labour market policy in Denmark, where liberal dismissal rules favor the adaptation to fluctuations in economic demand, in case of unemployment, but by intensive supervision and

further qualifications, the rapid return in the labour market is supported, cushioned by a high level of benefits. Germany lies with proper protection against dismissal and good protection in case of unemployment between Sweden and Denmark.

The accent on activation can be measured for international comparison by the spending on active labour market policies as a percentage of GDP.

The success of labour market policy can be especially seen in the economic terms of integration, i.e. in a high employment rate and a low unemployment rate. Furthermore, I compare how well the participation in the labour market is for foreign-born as compared to native-born.

Family: The importance of family support can be, inter alia, seen in public spending on families as a percentage of GDP. The fertility rate in the developed countries follows roughly the order of the women-friendliness and of the public spending on families.

In the field of **education** I particularly differentiate in the early or late primary selection in the education system, since the early selection in hierarchically differentiated pathways has been found in the PISA studies as unfavourable for the equality of opportunity and for the average performance. The share of public education expenditure in GDP and the share of private education expenditure in GDP are indicators of the importance of education in a society in international comparison. Esping-Andersen examines only those areas of social policy in the strict sense, not education. But an above average in an international comparison of the proportion of *private spending* on education as a percentage of GDP can also be interpreted as an indication of a *liberal welfare logic*.

The preventive aspect of social security can be summarized by the total expenditure on education as percentage of GDP. With high investment in education I would expect – for countries with the same level of inequality – a lower level of educational poverty, i.e. less early school leavers and less risk-readers in the sense of PISA. In the higher level of education, a larger proportion of the population with tertiary education, a higher average value of the competencies according to PISA and a greater proportion of the PISA-tip can be expected in the case of stronger investment in the capabilities through the education system. These objective factors of capabilities to autonomy should also favor a higher subjective perception of autonomy in the sense of real freedom of choice, but the subjective autonomy varies to some extent beyond the aforementioned objective factors.

Also in the educational system, I examine the degree of participation of the "foreign-born" as compared to non-migrants.

For the **type and development trend** it is of particular interest, whether in addition to the three classical welfare logics of Esping-Andersen (social-democratic, economically liberal, conservative) and now supplemented logics of

familism (as characterization of European conservative South in contrast to the conservative Continental Europe) and the productivism (as welfare logic of East Asia) in particular in Eastern Europe new welfare logics emerge or hybrid forms and combinations. This raises the question of what welfare logic dominates in the institutions of a country or which combination predominates. Furthermore, it is of course of particular interest, whether a prevailing welfare logic of a country is further followed and developed by the government or whether a new government seeks to introduce a new welfare logic through corresponding programs, this can extend to a path change in the welfare logic. A striking example of the strengthening of economic liberalism was the "Thatcherism" in the United Kingdom. The expected development trend can best be estimated using the direction of the current government program.

In the country case studies it will also be discussed, how well the different institutions with their different welfare logics perform in international comparison according to the selected criteria of socially desirable goals. The explanatory approach is to partially explain the performance of the countries and welfare regimes (explanandum) through the welfare logics of the institutions as well as the implemented policies (explanans).

2.3 Performance profiles of the welfare regimes

Since targets such as growth (e.g. mountains of consumption) and ecological sustainability (e.g. garbage dumps) can conflict, the goals are presented in a star diagram, with the goals pointing outwards (see Figure 2-1)[3]. For the recognition of peculiarities, friendliness towards women is chosen for the graphic, since the data base is more complete and better than for the friendliness towards migrants (the results of which are however documented in table 2-5).

With regard to this conceptual figure, the *social-democratic welfare regime of Scandinavia* is currently almost everywhere at the outside in Figure 2-1. Seven of the nine criteria are on average best met by the social-democratic countries (see Table 2-5), so that achieving all these - partially conflicting - goals is quite possible. With the highest public and the second highest private expenditures for research and development, the social-democratic welfare regime ranks on top in terms of internet use, on 3rd place with regard to patents and altogether on second place in the overall index of innovation capacity. With regard to economic prosperity, the social-democratic welfare regime ranks by now in front of the economically liberal and the conservative welfare regime. The high

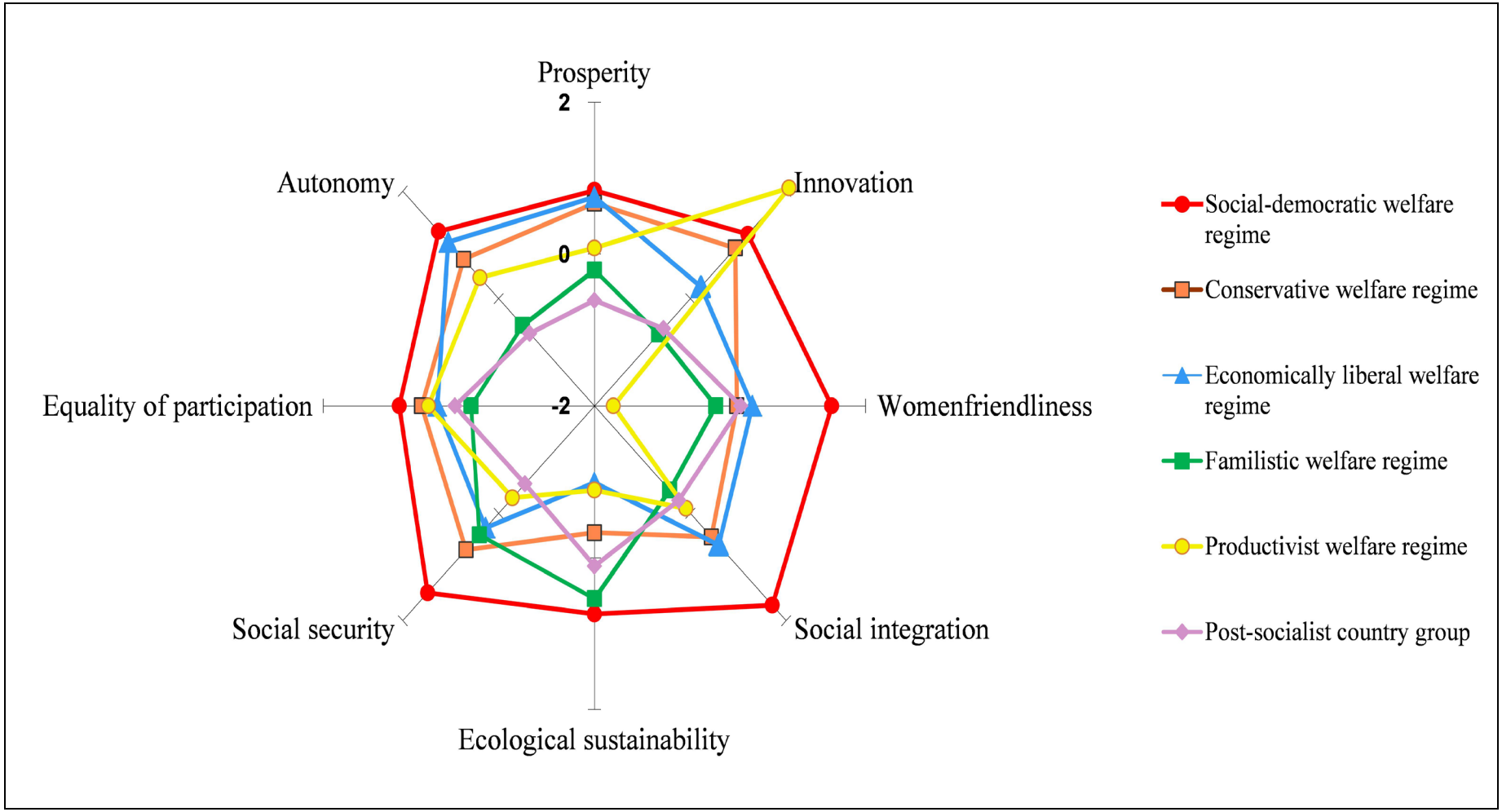
[3] The indicators, subindices and indices are each standardized to make them more comparable. (Hence, the mean value is 0, the variance (or the standard deviation) respectively 1.) Negative means: below the average. Positive: above average. For all criteria, I also report the standardized versions so that size orders are measured independently of the topic in the same "step length".

level of prosperity has the downside of an increased ecological stress level. But especially with regard to renewable energy and the relief efforts as a whole, the social-democratic welfare regime is so far ahead that it ranks also at the top in the overall index of ecological sustainability. That is, high prosperity and ecological sustainability are partly conflicting, but they are not incompatible. - The social-democratic welfare regime is the best choice for the provision of social security benefits in the case of risk and for prevention through education as well as for social protection altogether. Due to the highest total investments in precaution and aftercare, the social-democratic welfare regime achieves the lowest income poverty risk and the most egalitarian distribution of income as well as the leading place in the overall index for the equality of participation. Through these investments, the welfare regime also favors the highest satisfaction of the population with the freedom of choice and the best objective capability of the population for autonomy and thus also the first place in the objective and subjective autonomy as a whole. - The social-democratic welfare regime ranks at the top with regards to the proportion of women in parliament, the proportion of female students, the female employment rate and the female income ratio, as well as the overall index of friendliness towards women.

With regard to personal integration and to integration in the civil society, as well as in the overall index of social inclusion, the social-democratic welfare regime always ranks at the top, although this is primarily the case for the indigenous population and less for migrants.

As to the admission of migrants and to naturalization, the social-democratic welfare regime has improved. But it ranges at the end with regard to the participation of migrants in the educational system and on the labour market; and this is also the case for the overall index of friendliness towards migrants. This is a weak point of the social-democratic welfare regime, which was ethnically and culturally relatively homogeneous and has few experiences with migrants (see also table 2-5).

Figure 2-1: The overall performance of the welfare regimes



Model: Dieter Holtmann

Table 2-5: The overall performance of the welfare regimes

	Inno-vation	Pro-sperity	Eco-logical sustain-ability	Social security	Equality of partici-pation	Auto-nomy	Women-friend-liness	Mig-rant-friend-liness	Social integra-tion
Social-democratic welfare regime	1,20	0,84	0,74	1,48	0,88	1,25	1,50	-0,40	1,71
	2.	1.	1.	1.	1.	1.	1.	5.	1.
Status-conserving welfare regime	0,94	0,67	-0,33	0,68	0,55	0,73	0,10	-0,09	0,44
	3.	3.*	4.	2.	2.	3.	4.	4.	3.
Economically liberal welfare regime	0,22	0,75	-0,99	0,27	0,32	1,05	0,33	1,36	0,59
	4.	2.	6.	4.	4.	2.	2.	1.	2.
Familistic welfare regime	-0,66	-0,21	0,54	0,40	-0,18	-0,50	-0,21	0,46	-0,43
	6.	5.	2.	3.	6.	5.	5.	2.	6.
Productivist welfare regime	2,06	0,08	-0,89	-0,29	0,45	0,39	-1,72	-1,73	-0,09
	1.	4.	5.	5.	3.	4.	6.	6.	4.
Post-socialist group of countries	-0,56	-0,61	0,11	-0,55	0,06	-0,65	0,16	-0,01	-0,24
	5.	6.	3.	6.	5.	6.	3.	3.	5.

Indicated are the z values (top line) and rank places (bottom line) of the welfare regimes for the examined performance criteria.

* Without the outlier Luxembourg.

The conservative welfare regime of continental Europe ranks third among the welfare regimes in terms of innovation, and this also applies to the prosperity achieved (the city state of Luxembourg as an outlier is not taken into account). The social-democratic, the economically liberal and the conservative welfare regime exhibit a similar level of prosperity; these are the three prosperous welfare regimes. As a downside to high prosperity, the conservative welfare regime ranges at the penultimate place in terms of ecological burden. With respect to relief efforts, however, it achieves the 3rd place and in the overall index of ecological sustainability the 4th place of the 6 welfare regimes. – While the conservative welfare regime is second to the social-democratic welfare regime in the aftercare expenditures of the welfare sector, it ranges only on third place in the preventive public and private educational expenditures. The 2nd place in social protection as a whole is the basis for the second place in the case of income poverty, of income inequality and in the overall index for equality of participation. In the case of objective capability for autonomy, the conservative welfare regime reaches the 4th place, and in the case of subjective autonomy the third place, the latter also applies to the overall index of autonomy. – Like the 4th place in the female income ratio, the conservative welfare regime also

reaches the 4th place in the overall index of women-friendliness. In the case of integration in the civil society, the conservative welfare regime is second, and third in the overall index of social integration. However, social integration is more successful for the native population. In terms of openness for migration, the prosperous conservative welfare regime is still in the second place behind the economically liberal welfare regime, but it only ranks fourth in terms of the participation of migrants in the educational system and on the labour market. The latter also applies to the overall index of migrant-friendliness.

While the economically liberal Anglo-Saxon welfare regime occupies 4th place in all indicators of innovation capacity and also in the overall index, it is a little behind the social-democratic, and roughly the same, with the conservative welfare regime in the 2nd place. This is particularly the case in the USA, which is transforming its world power status and its monetary policy into a high average prosperity. As a downside to high prosperity, the economic welfare regime has the highest ecological impact level and is also at the penultimate place in the relief efforts. Priority is given to prosperity and economic growth, neglecting ecological sustainability (last place in the overall index). While the economically liberal welfare regime occupies 4th place in all indicators of innovation capacity and also in the overall index, in the standard of living it ranks a little behind the social-democratic and a little before the conservative welfare regime on the 2nd place. This is particularly caused by the USA, which is transforming its world power status and its currency privilege into a high average prosperity. As a downside to high prosperity, the economically liberal welfare regime has the highest ecological burden and ranges also at the penultimate point with respect to the relief efforts. Priority is given to prosperity and economic growth, neglecting ecological sustainability (last place in the overall index). – While the economically liberal welfare regime is part of the lower half with respect to the expenditures of the welfare state, it reaches the second place behind the social-democratic welfare regime in terms of public and private educational expenditures. As a result, the economically liberal welfare regime is also on second place in terms of low educational poverty. On the other hand, the income poverty is the second highest and the inequality of the income distribution is the highest among all welfare regimes, since the state interferes as little as possible in the markets in accordance with the economically liberal philosophy. The second place in terms of investments in education pays off in the 2nd place for the objective capabilities on the basis of the educational

system. According to Gallup (2016), the subjective satisfaction of the population with the freedom of choice ranks also on second place. In this way, the economically liberal welfare regime also reaches the second place in the overall index of subjective and objective autonomy, a good result on the basis of prosperity and educational investments. – Women's employment rate and women's income quotient of the economically liberal welfare regime rank each on the second place behind the social-democratic welfare regime, but the

representation of women in parliament ranges only on the 4th place. Both in terms of openness for migrants as well as in the participation of migrants in the educational system and on the labour market, the economically liberal welfare regime ranks at the top, and the traditional immigrant countries also reach the first place with regard to the overall index of migrant-friendliness, since by learning processes and experiences they have developed the best way to deal with migrants. The economically liberal welfare regime is second in the employment rate and also in terms of personal integration, behind the social-democratic welfare regime, and it is also on second place behind the social-democratic welfare regime with respect to the overall index of social integration.

The familistic welfare regime of Southern Europe ranges at the end in both public and private investments in research and development. This also applies to the dissemination of Internet use and to the overall index of innovation capacity. In the standard of living, this welfare regime ranges with the penultimate place somewhat better than Eastern Europe, as the tourism contributes to the prosperity of the Southern countries. With respect to the ecological burden by the CO2-emissions and the nuclear energy risk technology, Southern Europe is the best. The relief efforts are on second place, so that the familistic welfare regime reaches the second place behind the social-democratic welfare regime with respect to the overall index of ecological sustainability. – In terms of public and private educational expenditures as precaution, the familistic welfare regime ranges fourth. In the expenditures of the welfare state, the familistic welfare regime ranks on the third place, although the expenditures are too much directed to the insiders of the labour market and to pensions. The familistic welfare regime also ranks 3rd with respect to the overall index of social security. The familistic welfare regime ranges 4th in terms of high income poverty and great inequality in the income distribution. In terms of "risk-readers" in the sense of PISA and with respect to educational poverty, the familistic welfare regime ranges at the very end, the educational system is very little successful. That is why the familistic welfare regime of Southern Europe ranges also at the end with respect to the overall index for the equality of participation. In terms of objective capability for autonomy (inter alia by reading competencies), Southern Europe ranges on penultimate place. The satisfaction with the freedom of choice is somewhat higher than in the post-socialist group of countries. In the overall index for objective and subjective autonomy, the familistic welfare regime ranges then also on the penultimate position, followed by the post-socialist group of countries at the very end. – Due to the great influence of the Churches in Southern Europe, gender roles are still relatively traditional. In the women's employment rate and in the female income ratio as well as in the overall index of women-friendliness, the familistic welfare regime ranges on the penultimate position, followed only by the productivist welfare regime of East Asia. In terms of openness for migration, the familistic welfare regime ranges on the 4th place, but on second place with regard to migrants' participation; and this also applies

to the overall index of migrant-friendliness. The traditional countries in Southern Europe range at the end in terms of the employment rate; this also applies to the unemployment rate of the relatively less competitive countries of Southern Europe after the global financial crisis. In terms of integration in the civil society, with the fourth place the South is better off than in economic integration, but the familistic welfare regime nevertheless ranks at the end with respect to the overall index of social integration.

Since the enterprises in the productivist welfare regime of East Asia invest comparatively by far the most in research and development, it ranks also at the top in the overall expenditures. Because of the productivist concept of economic advancement through competitiveness on the world market, the productivist welfare regime is also at the forefront of important patents aimed at safeguarding technological developments against its competitors. Hence, the productivist welfare regime is also at the forefront with respect to the overall index of innovation capacity (before the social-democratic welfare regime). But in prosperity it is still behind the three wealthy welfare regimes, the social-democratic, the economically liberal and the conservative. However, the growth rate is higher in the productivist welfare regime.

The two productivist countries already belong to the 18 countries with the highest prosperity. In terms of ecological burden, the productivist welfare regime ranges in the middle, because e. g. the amount of garbage is significantly lower than in the more prosperous economically liberal welfare regime. But in relief efforts the productivist welfare regime ranges even behind the economically liberal welfare regime at the very end, since the ecological sustainability has been neglected due to the one-sided focus on economic growth. – In the priorities between precaution and after care in social security, the productivist welfare regime places greater emphasis on public and private investments in education as a precautionary measure, but in the case of the expenditures of the welfare state it is by far on last place, since the protection in case of risk is left to the families. The performances with respect to the equality of participation in terms of education and income are corresponding.

While the productivist welfare regime is at the forefront in terms of few "risk-readers" in the sense of PISA and with little educational poverty, it ranges at the very end in terms of high income poverty, since the protection is left to the families. In the objective capability of the population to autonomy through the education system, the productivist welfare regime is at the forefront in terms of

average reading competency as well as in the amount of top readers. This good result is, however, relativized by the subjective assessment of the population, whose satisfaction with the freedom of choice is only ranked fourth. In terms of objective and subjective autonomy as a whole, the productivist welfare regime is then on the fourth place behind the three prosperous welfare regimes. – The gender roles in the productivist welfare regime of East Asia are still very

traditional; hence the proportion of women in the parliament as well as the proportion of female students, the female employment rate and the female income ratio range at the very end, which then of course also applies to the overall index of women-friendliness. Since the countries of the productivist welfare regime of East Asia are still strongly nationally oriented, there are only about 2 % migrants. Further information on the participation of migrants is not available in the usual surveys. According to this few information, the productivist welfare regime of East Asia ranges on the last place in terms of migrant-friendliness. According to the productivist welfare logic, integration into the labour market is comparatively best achieved in the productivist welfare regime. The employment rate ranges only on 4th place because of the traditional gender roles. In the case of personal integration and integration in the civil society, it ranges at the end. Because of the good economic integration, the productivist welfare regime ranges fourth with respect to the overall index of social integration, but it is largely the social integration of the natives, since there are only few migrants.

In private as well as in public investments in research and development, the post-socialist group of countries in Eastern Europe ranges in the penultimate position before the familistic welfare regime. This also applies to the dissemination of Internet use and to the overall index of innovation capacity. In the case of average prosperity, this country group ranges at the very end, with the Czech Republic and Slovenia already catching up to the midfield. On the other hand, this group of countries has a low level of garbage and the second lowest ecological burden. In the use of energy, e. g. the raw material rich Russia is little efficient. In the relief efforts altogether, the country group is on fourth place, hence it reaches only the third place in the overall index of ecological sustainability. – In the expenditures of the welfare state, the post-socialist group of countries ranges on the penultimate position, followed only by the productivist welfare regime of East Asia. In the case of public and private educational expenditures as precaution, this group of countries ranges even at the very end, and this also applies to the overall index of social security. Altogether, this group of countries has rather turned away from the model of governmental provision. In terms of the proportion of "risk-readers" as defined by PISA, this group of countries ranges on the penultimate position (before Southern Europe), and this also applies to total educational poverty. In terms of income poverty and in the inequality of the income distribution, this country group scores slightly better with the 3rd resp. 4th place, but this country group ranges on the penultimate position (before Southern Europe) with respect to the overall index of equality of participation. In terms of objective capability of the population to autonomy through the education system, the post-socialist group of countries ranges at the very end. This also applies to the satisfaction of the population with the freedom of choice as well as finally to the overall index of subjective and objective autonomy. –The post-socialist group of countries belongs to the

top in terms of the share of female students, but in the representation of women in parliament it ranges only on the penultimate position (before East Asia). In the case of women's income quotient, this country group is on third place, and this also applies to the overall index of women-friendliness. Because of the relatively low prosperity, this group of countries exhibits only a small number of migrants, only East Asia has fewer migrants. But in the participation of the (few) migrants, this group of countries is on third place; this also applies to the overall index of migrant-friendliness. In economic integration, the post-socialist group of countries ranges on the penultimate position (before the economic crisis countries of the South). In terms of integration in the civil society, this group of countries ranges at the very end; and this also applies to the overall index of social integration. In the post-socialist societies, civil society has not yet developed long enough.

3. The social-democratic welfare regime of Scandinavia

3.1 Commonalities and particularities of the social-democratic countries

Commonalities

The welfare logic of the countries of Scandinavia is universalistic, i. e. all citizens are entitled to welfare benefits, which are also uniformly structured. As a result of the historical compromise between the workers' movement and the middle class, the welfare benefits have a high level. The basis for this model is the solidarity of the citizens.

The economy is nationally coordinated; the state pursues the goal of full employment, which makes it easier to finance the high level of welfare benefits. The trade unions are relatively strong in Scandinavia.

The norms for the gender roles are egalitarian, both for paid work and for care work. The individual is taxed, not the individual in the context of families. The state supports gender equality through a well-developed infrastructure for childcare.

The social security systems at a high level are financed mainly by taxes, less by contributions. Old-age provision and health care are more likely to be seen as public tasks, with less burden for private households in international comparison. In the case of unemployment, a high level of protection is provided, but at the same time the focus is on precaution through qualification and further training. Families are supported and relieved by a multitude of state services.

In the education system, equality of opportunity is a key goal, so there is a late selection in the school system, high public investment in education, and relatively low private expenditure on education.

Particularities

The **Swedish** "Volksheim" is a prototype of the social-democratic welfare logic. The establishment of this model of universalist and comprehensive social security through the redistributive social state goes back to long phases of social-democratic government participation. The welfare state of Sweden is also regarded as particularly "women-friendly".

The **Danish** model ("flexicurity") has a particularly employment-friendly combination of low level of employment protection (“flexibility”) and a high level of benefits in the case of unemployment ("security"). An active labour market policy and job rotation are components of this model.

As a result of reforms since the 1960s, **Finland** has created a school system which, with the late primary selection and conscious social mix of school classes, is regularly at the forefront of PISA performance assessments.

With a universalistic welfare state and favoured by its oil wealth, **Norway** belongs to the top with regard to living standard. Norway was the pioneer of gender equality in some aspects, such as the quota in enterprise supervisory boards.

3.2 Case studies on the individual countries

Sweden

Type and development trend

Sweden has a long period of social-democratic government participation and a very high level of trade union organization. The economy is nationally coordinated between employers' organizations and trade unions. The Swedish "Volksheim" can be seen as the prototype of the social-democratic welfare regime. With high individual taxation, a dense public network of social security systems is financed. The basis for the benefit claim is citizenship. Through an alliance of workers' movement and women's movement, the value of equality in Sweden has been historically formative. The care infrastructure is very well developed, so that women's employment is supported, which is also suggested by individual taxation and a high tax rate. The universalist logic of the production of welfare is reflected in the uniform security systems for all citizens and also in the uniform system of education with late primary selection. The reforms in Sweden under the two conservative governments from 2006 and 2010 were less aimed at a fundamental change, but rather to increase the target accuracy of the services ("recalibration" according to Pearson 2001) and the cost containment. The overall level of social protection was thus reduced overall. Nevertheless, according to Jochem 2010, employment in social services was

also used by the bourgeois government to stabilize the economy after the global financial crisis.

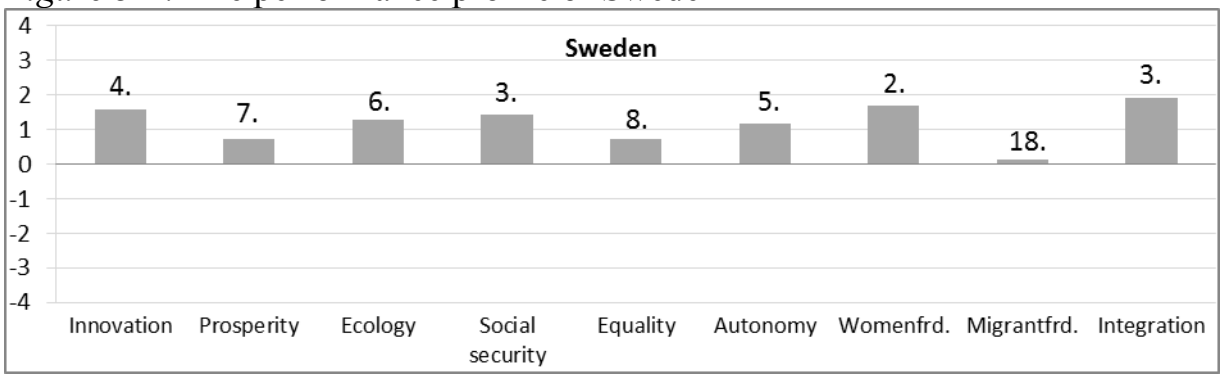
After the parliamentary elections in September 2014, a red-green (minority) government, led by social-democratic prime minister Stefan Löfven, came into power for the first time in Sweden. The red-green government intends, inter alia, to reduce youth unemployment, abolish the allowance for home child care (in favour of the care infrastructure) and increase the share of renewable energies.

The performance profile of Sweden

Sweden can be seen as the prototype of the social-democratic welfare logic.

With regard to research and development, Sweden is investing most as share of GDP (besides South Korea and Japan), which is also reflected in a good output, so that Sweden achieves the fourth place among the 43 countries in the overall index of innovation. In terms of prosperity, Sweden has improved to seventh place on this basis. With its high prosperity, Sweden is weighing on the environment as much as the international average, but it is second in terms of the relief efforts, with its high share of regenerative energy on second place (behind Norway) and third in ecological agriculture (behind Austria and Estonia), because environmental awareness is well developed in Swedish society.

Figure 3-1: The performance profile of Sweden



Indicated are the z values (i.e., made comparable in the scale and presented as effects above and below the average (zero)) and the rank places relative to the 43 considered countries for the examined performance criteria.

Sweden invests well-balanced in prevention by the education system as well as in aftercare social expenditures by the welfare state, thus achieving the third place in the overall index of social security (behind Denmark and Finland). Redistribution through the welfare state limits income inequality (fourth place). In the overall index of equality of participation in education and income, Sweden reaches place 8 among the 43 countries considered. On the basis of the relatively high total education expenditures, Sweden is among the first third of

the countries considered with regard to the average reading competency according to PISA and to the proportion of top readers each. Altogether, the population is objectively well enabled for autonomy. If one considers the very high satisfaction of the population with the freedom of the choice of the way of living, Sweden reaches place 5 among the 43 countries considered in the overall index of objective and subjective autonomy.

Sweden is a world leader in women-friendly welfare, along with Denmark and Norway. With regard to the share of women in parliament and to the share of women among students, Sweden ranks as the top of the 43 countries considered. Dealing with migrants, on the other hand, is one of the weak points of the social-democratic countries of Scandinavia. Sweden has been increasing the number of migrants for some time and is now at the forefront as to naturalization, but with regard to the participation of the migrants in education and employment, Sweden belongs to the last third of the countries considered. Sweden admitted a disproportionate number of refugees in 2015, and is therefore very open. However, the problems of the participation of the migrants in the education system and on the labour market have not yet been solved.

In terms of the integration of its citizens into paid employment, Sweden is at the forefront, because of its equal gender roles. Participation in civil society is best developed from all 43 countries considered, so that Sweden also belongs to the top with regard to the overall index of social integration, together with Norway and Denmark.

Denmark

Type and development trend

Denmark is not only geographically situated between the Social-Democratic Sweden and the economically liberal Great Britain, but Denmark also has components of both in terms of social policy. Social-Democratic governments and Conservatives are changing regularly. Tripartism is reflected in the successful "flexicurity model" of the Danish employment policy: the local government, employers and employee representatives have the task to identify future-oriented employment fields, so that employees, whose jobs cannot be maintained, are prepared for such activities by training. Employers' flexibility in terms of dismissal is compensated by a high level of benefits in job rotation and training.

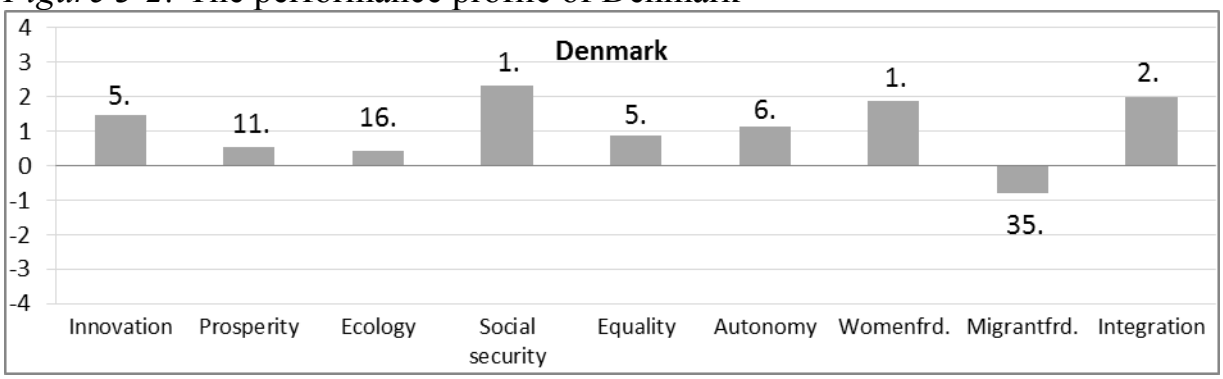
The reform plans of the center-left government (since September 2011) included a socially balanced tax system with a lower burden on labour income and a partial liberalization of migration policy. In June 2015, however, the "right-wing camp" won the parliamentary elections with the migration issue, with the Social Democrats as relatively strongest party only in the role of opposition.

One of Denmark's weak points is dealing with migrants. Under the conservative government since June 2015, this is not likely to change so quickly.

The performance profile of Denmark

Denmark is investing heavily in research and development, and is among the top five in terms of internet use and patents. In the overall index of innovation, Denmark also belongs to the top five. With regard to prosperity, Denmark ranks in the first third. As reverse side of high prosperity, Denmark is burdening the environment above-average – e.g. by too much garbage (rank 41 of 42 countries). Denmark is among the top ten in terms of relief efforts. With regard to environmental sustainability, Denmark therefore belongs to the first third.

Figure 3-2: The performance profile of Denmark



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

With regard to the social welfare expenditures, Denmark ranks fourth among the 43 countries. With this well-equipped social security net, Denmark reaches low income poverty (rank 4). In the overall index of the equality of participation with regard to income and education, Denmark is thus ranked 5th. – Denmark stands at the top with regard to the total educational expenditure. Denmark's share of tertiary qualifications is in the upper midfield and average reading competency according to PISA in the first third. Overall, Denmark is among the top ten in terms of the objective capability of the population to autonomy.

In the representation of women in parliament, in the labour ratio of women and in the income ratio, Denmark belongs to the top. That is why Denmark reaches the top in the overall index of women-friendliness. While women-friendliness in Denmark is very strong and it is at the top of all 43 countries, Denmark is among the last third with regard to the openness for migrants. And the participation of the migrants in the education system and on the labour market range at the end of the midfield. In the overall index of migrant-friendliness, Denmark thus belongs to the last third of the 43 countries considered.

For the citizens of Denmark, however, civil society is particularly well developed. With its "flexicurity" policy, Denmark is one of the top ten with regard to the integration into the system of gainful employment. The combination of economically liberal dismissal protection, a high level of social protection in the case of unemployment, and intensive coaching into a more promising workplace through further training, proves to be a successful employment policy. In terms of the integration in civil society, Denmark ranks on second place. This also applies to the overall index of social integration, together with Norway and Sweden Denmark ranks at the top.

Finland

Type and development trend

Finland has the highest degree of trade union organization (before Sweden and Denmark). This is a hint to the strength of the workforce as well as the strong anchoring of values of solidarity and equality. These values are reflected in the Finnish school system, where there is no early primary selection, and school classes are intentionally socially mixed to provide more stimulation to the disadvantaged, which does not harm the more privileged pupils according to educational research.

Status-preserving elements are to be found in the contributory pension scheme and in the health care system. The support of home care for children is also a conservative element. Dealing with migrants is a weak point of Finland, which can be improved in the ethnically homogeneous Finland in a learning process.

Overall, the welfare logic in Finland is universalist with some status-preserving elements.

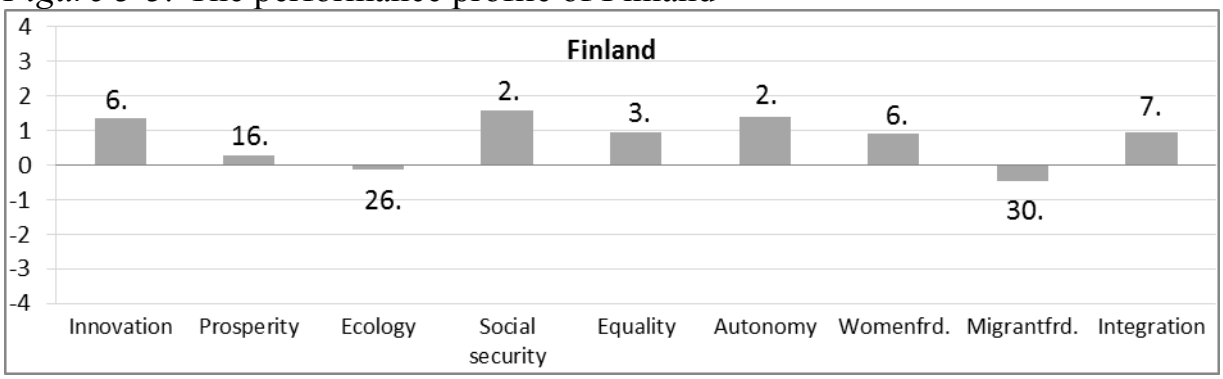
The performance profile of Finland

Finland invests heavily in research and development in international comparison (together with South Korea, Japan and Sweden). In the overall index of innovation, Finland is ranked on place 6, because it has declined somewhat as to patents. In labour market policy, Finland is less successful and thus is only in the upper midfield with regard to average prosperity. As the downside of prosperity, Finland ranges in the last third with its high ecological burden, particularly as a result of high CO_2 emissions and a high share of nuclear energy. As to the relief efforts, Finland, on the other hand, belongs to the top ten, i. a. with a high share of regenerative energies.

With regard to the aftercare social security expenditures of the welfare state, Finland ranks second among the 43 countries considered. Thus Finland achieves a relatively low level of income inequality and poverty. With regard to the preventive expenditures on education, Finland also belongs to the top. Together

with the equality of opportunity in the education system, Finland is ranked third among the 43 countries considered in terms of equality of participation in education and income. According to the PISA evaluations, the Finnish education system is also at the forefront. The heterogeneous school classes, which are intentionally mixed with regard to performance and to the status of the parents, do not harm the more privileged and offer more stimulations to the deprived, so that the average performance, the proportion of top readers and the objective capability of the population for autonomy achieve the second place each among the 43 countries considered. Thus, Finland is investing well balanced in the prevention through education as well as in the aftercare social expenditures of the welfare state.

Figure 3-3: The performance profile of Finland



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

In particular, the gender-specific differences in the parliamentary representation and the participation in the labour force are very low, so that Finland is one of the top group in the overall index of women-friendliness, together with the other social-democratic countries of Denmark, Sweden and Norway. The integration of migrants is a weakness of Finnish society. With regard to the admission of migrants, Finland belongs to the last third; and this also applies to the participation of the (few) migrants in the education system. In the average performance of the education system, this is not very noticeable, because there are only few migrants.

In terms of integration into paid employment, Finland is only in the international average. On the other hand, the degree of trade unionization in Finland is highest among all the countries considered, and Finland belongs to the top as to the participation in civil society. In this way, Finland is seventh among the 43 countries considered in the overall index of social integration.

Norway

Type and development trend

As a developed social market economy and additionally rich in oil wealth, Norway has particularly good conditions in the production and distribution of welfare. Norway invests the most from the 43 countries considered in the modern internet infrastructure, has the highest share of renewable energies, and is one of the most successful countries in terms of paid employment. The social network is encompassing.

As far as childcare is concerned, Norway has introduced a choice model between home care and state care institutions, both of which are promoted. The trend is, however, in the direction of incentives to increase women's employment, since the age of the children, whose care is supported, has been reduced from the original age of three via one to two years until one year.

In the parliaments, women are already well represented in Norway by international standards, and Norway is even at the very top in terms of women's employment quotient.

After long social-democratic dominance, Norway has a conservative right-wing populist government since October 2013. The Norwegian families shall be supported more strongly and migration policies shall become more restrictive. The elections in September 2017 confirmed the conservative government coalition, which had promised tax cuts. The welfare state as a whole is likely to be somewhat slimmed down.

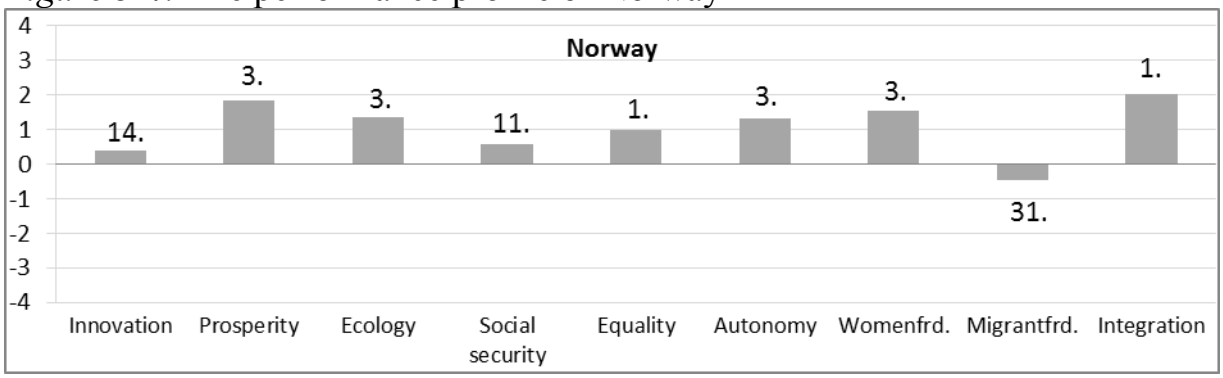
The performance profile of Norway

Norway is in the forefront of public and private investments in research and development. As far as internet use is concerned, Norway is at the top of the 43 countries considered and the total output of the investments is in the first third. Norway also belongs to the first third with regard to the overall innovation index. I. a. because of its oil wealth, Norway is in the forefront of economic prosperity. As a result of prosperity, Norway is burdening the environment by CO_2 emissions, especially because of the oil and natural gas production. On the other hand, Norway is at the forefront of relief efforts thanks to its high level of awareness of the problem and the corresponding environmental policy, particularly because of the relatively high share of renewable energies. That is why Norway belongs to the top in the overall index of ecological sustainability.

Overall, the aftercare social expenditures of the welfare state are slightly above the average of the 43 countries considered. Taking into account the very high GDP, the level of social security is high. With its social spending, Norway achieves very low income poverty and even the lowest income inequality of all 43 countries considered, a strong result of the Norwegian social welfare system. Norway is by now also at the top of the 43 countries considered with regard to

the overall index of equality of participation. Norway's share of the total education expenditure on GDP is 10th among the 43 countries considered. Norway's universalist education system attains a share of tertiary degrees, which is one of the top ten. Norway is now also among the top ten in PISA's competence evaluations of education systems. Norway has improved to fourth place in terms of the objective capability of the population to autonomy. Norway is by meanwhile at the very top of the 43 countries considered in terms of satisfaction of the population with the freedom of choice. In this way Norway achieves a good third place in the overall index of objective and subjective autonomy.

Figure 3-4: The performance profile of Norway



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

Norway is at the forefront of the representation of women in parliament, while in women's employment quotient Norway is even at the very top of the 43 countries considered. That is why Norway also belongs to the top of the countries considered in the overall index of women-friendliness, just behind Denmark and Sweden. With regard to the openness for migrants, Norway belongs to the first third, but as to the participation of the migrants in the education system and on the labour market, Norway ranges altogether in the last third. This also applies to the overall index of migrant-friendliness. Until now, the extent of migrant-friendliness is a weakness of the Norwegian society.

For its citizens, however, Norway is successful in terms of the integration into the employment system. Norway is also at the forefront as to the participation in politics and trade unions. With regard to the overall index of social integration, Norway ranks now at the top of all 43 countries considered (before Denmark and Sweden).

3.3 Performance of the social-democratic countries of Scandinavia

In the following, an attempt is made to explain the performance of the countries with social-democratic welfare logic (see Table 3-1) in part by the welfare logic

of the regime type, the guiding principles of the policies and the correspondingly designed institutions of the countries.

In the social-democratic welfare regime, the logic of the production and distribution of welfare is based ideal typically on the universalism of the equal participation of all citizens. This has been established in the decades of the hegemony of trade unions and social democracy in cooperation with the women's movement, and has only been made more effective under the following middle-right governments with the aim of cost containment.

Table 3-1: Performance profiles of the social-democratic countries

Country	Inno-vation	Pro-sperity	Eco-logical sustain-ability	Social security	Equality of partici-pation	Auto-nomy	Women-friend-liness	Mig-rant-friend-liness	Social integra-tion
Denmark	1,46	0,54	0,44	2,31	0,88	1,12	1,88	-0,79	1,98
	5	11	16	1	5	6	1	35	2
Finland	1,36	0,27	-0,15	1,59	0,95	1,41	0,90	-0,48	0,93
	6	16	26	2	3	2	6	30	7
Norway	0,38	1,83	1,36	0,56	0,97	1,32	1,52	-0,48	2,01
	14	3	3	11	1	3	3	31	1
Sweden	1,60	0,72	1,30	1,45	0,72	1,17	1,68	0,14	1,90
	4	7	6	3	8	5	2	18	3

Indicated are the z values (top line) and rank places (bottom line) of the countries for the examined performance criteria.

The social security systems are accordingly encompassing, the priority being the prevention through education and an active labour market policy to achieve full employment, which is necessary for the financing of the comprehensive social welfare. The gender roles are egalitarian; the "dual-earner-dual-carer" model prevails. The educational system strives for the equality of opportunities by providing a uniform school system, in which the school classes are deliberately put together with heterogeneous performance and varying social background of pupils, so that the disadvantaged receive more stimulus, which does not harm the more privileged pupils according to educational research. The results of the PISA evaluations show that the social-democratic education systems are among the most successful.

Sweden, Denmark and Finland (after Japan and South Korea) invest most in research and development, which is also reflected in the corresponding output, making Sweden, Denmark and Finland belong to the top in the overall innovation capacity (after Japan, South Korea and Switzerland). In terms of living standard, the Scandinavian countries are all well above the international average, with Norway belonging to the top of the 43 countries considered because of its oil wealth. While the Scandinavian countries perform compara-

tively poor with regard to the ecological burden as a result of the high level of prosperity, they are among the top ten in relief efforts, since environmental awareness is well developed in the public discussion of Scandinavia.

Denmark, Finland and Sweden rank jointly at the top with regard to social protection through precaution and aftercare, and Norway belongs to the first third. Denmark ranks at the top of all 43 countries considered, as it invests both at a high level in the precaution through education and at a high level of aftercare in the case of risk by the benefits of the welfare state. With their low income poverty and inequality, all Scandinavian countries are among the top ten. In the overall index of the equality of participation in education and income, Norway is at the very top of all 43 countries considered. In the case of objective capability for autonomy, all Scandinavian countries are among the top ten, with Finland's school system at the top (together with Canada) according to the PISA evaluations. In the subjectively perceived freedom of choice of the way of life, all Scandinavian countries are among the top ten, and the prosperous Norway with its high equality of participation is at the top of all countries considered. In the overall index of objective and subjective autonomy, all Scandinavian countries are among the top six of the 43 countries considered.

Denmark, Sweden and Norway are jointly at the top in the overall index of women-friendliness, while Finland is ranked 6th. Denmark leads in the process of equal pay; Sweden is at the top of women's participation in parliament; Sweden and Norway have the highest share of female students; and in the area of women's employment, the four social-democratic countries rank jointly at the top of all 43 countries considered.

As to the share of migrants, Denmark and Finland are below the international average, while Sweden and Norway have improved and now belong to the first third. However, with regard to the participation of the (relatively few) migrants in the education system and on the labour market as a whole, the Scandinavian countries are all below the international average, which is a joint weakness of the Scandinavian countries.

The Scandinavian countries rank jointly at the top as to the integration in civil society. Norway, Denmark and Sweden are jointly at the top with regard to the overall index of social integration, as they also perform well in terms of economic integration.

Overall, the countries of Scandinavia are also very homogeneous in terms of performances, which mainly belong to the top group. Only the participation of migrants in the education system and on the labour market is a joint weakness of the Scandinavian countries.

4. The conservative welfare regime of Continental Europe

4.1 Commonalities and particularities of the conservative countries

The countries of the conservative type of welfare generally show a wide range of institutional characteristics, far more than, for example, the social-democratic countries of Scandinavia. This is due to the fact that they are very different from each other in their historical development and that their foundations are up to 650 years apart.

While Switzerland can look to a more than 700-year-old genesis in the differentiation of its institutions, countries such as France and Belgium have only emerged in their current state form since the end of the 18th and mid-nineteenth centuries. Germany and Austria are among the youngest nations in Europe and have only been part of the parliamentary democracies since the end of the Second World War.

Commonalities

Although they look back on such diverse historical developments, the political regimes of these countries are characterized by two or three large parties which are located in the "middle-left" to "middle-right" spectrum of the political space. In addition, there is a comparatively large number of smaller parties, for example in contrast to countries of the economically liberal type, which reflect the diversity of opinion and the eventful recent history (separation of Europe and the presence of two opposed ideologies) in these countries.

The considered countries of the conservative welfare type have all security systems, which are structured according to occupations and social status, and contain a status-preserving component in the case of social risks such as unemployment, illness or age. This system of social protection introduced by the former German Reichskanzler Bismarck, which was originally directed at a monarchical society divided into estates, exists in varying degrees until today, especially in the form of social insurance. The varying proportions of Bismarck's elements in the security systems of the conservative countries are grounded in the conflicts of the Second World War, after the end of which especially Austria and Germany expanded the system, while the liberated countries of Western Europe increasingly oriented themselves to Great Britain and the USA.

Social insurances as central welfare institutions are financed mainly by income-related contributions, the basis of the claim being the employment relationship, the benefits mainly take the form of financial transfers and are proportional to the contributions made in the occupational biography, but family members are co-insured.

In the economic sphere, one finds in all conservative countries social market economies which, on the one hand, shall take advantage of the positive impetus

of the free market for growing prosperity and, on the other hand, exhibit a relatively dense network of social safeguards against risks. Another common feature is the relatively strong interdependence of employers and trade unions, which is often mediated by the state. However, in all the countries analyzed one can observe the weakening of the workers' associations and the withdrawal of the state from these negotiations, while at the same time the employers strengthen. Causes for this common trend can be seen above all in the crises on the labour market since the mid-1970s and especially in the 1990s.

The strong stratification of the societies and institutions is also accompanied by a characteristic gender arrangement in the societies under consideration, which changes slowly and at different pace. Thus the role of women is constructed and institutionally strengthened in a form that results in a more egalitarian social position than in countries of the familistic type, but does not reach the gender balance of the countries with social-democratic or economically liberal welfare logic. Comparatively low rates of female employment and a childcare infrastructure designed for parental childhood care at home are only two of the various components of this institutional form.

Particularities

For the status-conserving welfare logic, Germany and Austria are prototypes.

The institutional character of the **Federal Republic of Germany** is particularly close to the ideal type of the conservative welfare regime, not only because of the decisive influence of the Bismarck social insurance system. That is why Germany - besides Austria - can be described as a prototype. For Germany, the education system, as one of the most important institutions of status-conserving arrangements, is particularly noteworthy. For example, the primary education selection is one of the earliest in the country comparison, namely after four to six common school years. The three-part school system determines in most cases the pupils' career biographies. Numerous scientific studies have shown the influence of the social positioning of the parents on children's education, which contributes decisively to the inheritance of cultural capital and the securing of parental status. A further peculiarity in the area of social protection is the relatively recent merger of unemployment benefits and social assistance, which is a departure from the idealtypical institution formation. The payment of uniform state benefits now decouples the actual status from the previous occupational status after the period of one year, which is an economically liberal element in the dominating conservative welfare logic. Furthermore, the strong development of the child-care infrastructure (since 2008) supports a development in direction of the "dual-earner family model".

Austria is similar to the conservative ideal type as Germany, but also has some peculiarities. Although there is no statutory minimum wage in Austria, wage ceilings of ca. 1500 Euro are widespread in the tariff agreements. This indicates a stronger emphasis on the social market economy. Comparable agreements are

to be found, above all, in countries of the social-democratic and economically liberal type, but in the latter type they are at a much lower level. A further peculiarity is in the area of social expenditures of the welfare state. For example, the individual provinces have a greater right in the calculation of benefits than in Germany, which means that different regional regulations exist within the country.

Looking at the institutional features of **Switzerland**, the first glance is to the economic sector. It is striking that over 50% of the enterprises are organized in collective agreements. These contracts, negotiated between employers and employees, guarantee a range of minimum standards, while at the same time embedding a general "peace obligation", which makes strikes in Switzerland very rare. The social security system in Switzerland is a mixture of Beveridge's and Bismarck's components. This can be seen above all in the first pillar of the pension system, which are contribution-financed, but provide only universal living pensions.

The system of financial redistribution between the regions is of particular importance for the institutional character of **Belgium**. Thus, from the service-oriented north of the country (Flanders) to the former industrial south (Wallonia) "solidarity payments" are made. This commitment, marked by socioeconomic disparities within the country, is a core of the political conflicts.

In the case of **Luxembourg**'s institutional characteristics, it is mainly the fact that the health system exhibits the rare feature of the principle of reimbursement: all benefits and medicines must be paid in advance and are reimbursed to a certain percentage in retrospect. Therefore, private supplementary insurances are relatively widespread, which is rather unusual for conservative countries. Characteristic of the pension system is that an employee must have worked at least 10 years to receive a pension. If the total time is less than this time, only the amounts paid will be refunded. On the other hand, there is a relatively high minimum pension in Luxembourg. This instrument reduces age poverty. At the same time, the universal minimum amount can be regarded as an element of universalistic welfare.

In **France** the claim of social equality is widespread, which in part contradicts the ideals of the conservative welfare type. This is why the French welfare state also has some universalist elements. For example, the country's pension system, despite a general linkage of the pension payments to the previous occupational position and the associated income, contains a universal component, which also takes account of seniors, who have not paid social security. The idea of equality also influences the dominant gender model, which can be described as relatively egalitarian in comparison to other countries of the conservative type of welfare. Thus the "dual-earner model" could be implemented on the basis of extensive childcare infrastructure. As part of the labour market flexibilization measures, a limitation of the payment of the unemployment allowance has now been

introduced to two years (from 50 years of age: three years). After this, there is a basic payment on a survival level comparable to the ALG II in Germany.

The **Netherlands** show the largest institutional deviations from the ideal type of the conservative welfare logic. In the wake of the labour market crises of the 1990s, the Netherlands was the first European country to introduce the concept of "flexicurity", which is characterized by a far-reaching flexibilisation of various employment relationships, with special benefits in taxation and labour law for part-time work and temporary employment. The system of social protection is characterized by a mixture of Bismarckian and Beveridge elements, because originally an orientation towards the neighbour Germany took place and after World War II a reorientation towards Great Britain. Since then, professional insurances have been combined with Dutch "national insurance", resulting in both status-preserving and universalistic forms of social security systems. The influence of universalistic elements is particularly evident in the pension system. This is based, in addition to the number of years worked, not on the previous income, but on the current minimum wage of the Netherlands. For this reason as well, the private share in the pension system is exceptionally high for a country with conservative welfare logic, as it is more likely to be found in economically liberal countries. One last peculiarity of the Dutch welfare institutions is the wide range of available schools. These represent the freedom of belief practiced in the country and, although privately run, are funded with government subsidies. However, there are common standards in curricula and final examinations to avoid too different performance requirements.

4.2 Case studies on the individual countries

Germany

Type and development trend

Germany can best be attributed to the conservative welfare regime type. This is particularly evident in the organization of social insurance, which is oriented towards employment and financed by contributions according to Bismarck's principles. It also aims at conserving the social status of the insured person even in risk situations, as is shown by the equivalence principle of pension insurance.

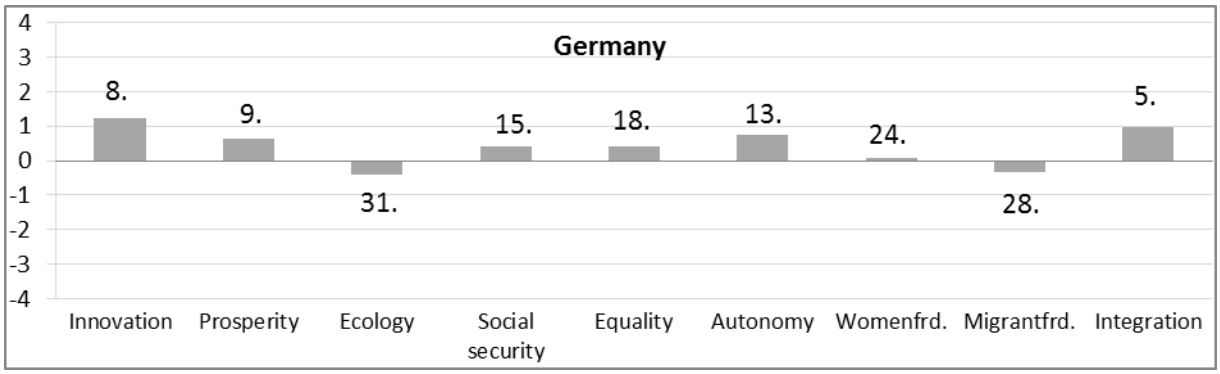
The model for gender roles also corresponds to the conservative logic: the "male-breadwinner model" still dominates; women are disproportionately in part-time work; the role of women is still seen in the care of the family, especially in the old federal states, so that state benefits for families are above all financial and the childcare provision is relatively poorly developed. In the past decade, however, a paradigm shift has taken place in the family policy, which is now increasingly supporting the "dual-earner model".

Even though the “Hartz”-reforms have limited the status conserving of the unemployed in time, and the provision of childcare services has been expanded, Germany is most likely to follow a modernized status-conserving development path.

The performance profile of Germany

With regard to private and public spending on research and development, Germany is one of the top ten countries, and it ranks even on place 3 in terms of the most important patents. In this way, Germany reaches place 8 in the overall index of innovation capacity. Germany's average prosperity has improved over the last few years because of its competitiveness and ranks now on place 9 of the 43 countries considered. As a downside to prosperity, Germany belongs to the last third of the considered countries in terms of ecological burden. On the other hand, Germany ranks in the upper midfield with regard to its relief efforts on ecological sustainability, since it performs i.a. relatively well in energy efficiency. Germany is likely to improve in terms of ecological sustainability, since – after the nuclear disaster in Japan in 2011 – the phasing-out of nuclear technology by 2022 has been introduced, and the strong expansion of renewable energies is planned.

Figure 4-1: The performance profile of Germany



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

In the overall expenditures of the welfare state, Germany reaches place 9 among the 43 countries considered. Germany thus achieves that the poverty rate and the income inequality are lower than the international average each. In the case of preventive educational expenditures, Germany belongs only to the lower midfield. In terms of educational poverty, Germany is slightly better than the international average. And this also applies to the overall index of the equality of participation in education and income. – In the average reading competency according to PISA and in the share of top readers, Germany is now among the top ten each, and thus has improved markedly from 2000 to 2015, which is based in particular on additional language courses for the disadvantaged. In

terms of the objective capability of the population to autonomy, Germany belongs to the upper midfield.

In terms of the representation of women in parliament, Germany belongs to the first third of the considered countries. As to the employment quotient, Germany is in the international average. But with the low female proportion of the student population, Germany ranges in the last third of the countries. With regard to the overall index of women-friendliness, Germany is therefore only at the beginning of the lower midfield of the 43 countries considered. – In the admission of migrants, Germany has improved to the international average. However, with regard to the participation of the migrants in the education system and on the labour market, as well as in the overall index of migrant-friendliness, Germany is only in the lower midfield. In August 2016, however, the Integration Act came into force, which increased the accessibility to language courses and the access to vocational training, so that the participation of migrants is likely to improve. Behind the USA, Germany is now the most popular immigration country according to OECD 2017.

According to the economic integration, i.e. the integration of the population into the employment system and the labour market, Germany is now among the top ten. Also with the extent of participation in the civil society, Germany belongs to the first third. In the overall index of social integration, Germany is now also among the top ten of the 43 countries considered.

Austria

Type und development trend

Austria can be attributed both institutionally and culturally to the conservative welfare logic. For example, the system of social protection follows the Bismarckian insurance principle, financed by contributions, which, in the case of social risks, is to maintain the socioeconomic status of the person concerned. Only in the case of proven need is a basic security provided by social assistance. In determining the need, all household income is considered. This shows that, unlike in countries of the economically liberal or social-democratic type, persons are not considered individually, but in the household and family context.

According to the PISA evaluations, the structured school system with early primary selection has a strong social heredity.

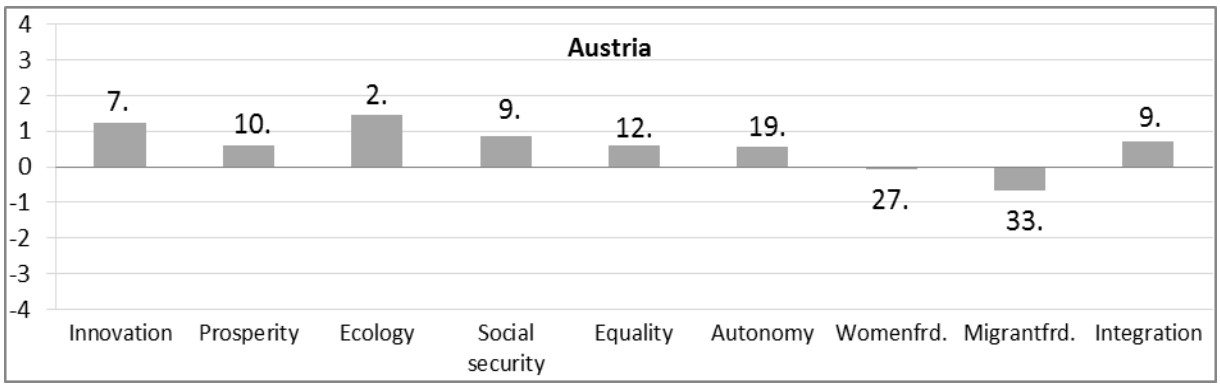
As a model for the gender roles, the "male-breadwinner model" (Lewis/Ostner 1994) still dominates, the child care facilities e.g. are not strongly developed and the parental leave is long as well as generously financed. However, modernization processes are also taking place in the gender roles, e.g. the increase in women's employment and the adjustment of the retirement age.

Overall, Austria follows a partly modernized status-conserving welfare logic.

The performance profile of Austria

Austria is one of the top ten countries in private spending on research and development and has even improved to the top position in terms of public spending. It is also among the first third in terms of the output in the form of important patents. In the overall index of innovation capacity, Austria thus ranks 7th among the countries. With regard to the average prosperity, Austria achieves place 10 among the 43 countries considered. For its high prosperity, the ecological burden of Austria is disproportionately low. Austria is even at the forefront with regard to its relief efforts – i.a. as to the spread of organic agriculture – so that it reaches the second place in the overall index of ecological sustainability.

Figure 4-2: The performance profile of Austria



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

With regard to the social welfare expenditures, Austria ranks sixth among the 43 countries considered. On this basis, Austria has a small poverty rate and low income inequality. According to the conservative welfare logic, precautionary education is less developed. Austria is only in the midfield with regard to the total expenditures on education. It is then also only in the midfield in terms of the proportion of risk-readers in the sense of PISA. When one takes into account income inequality, income poverty and educational poverty as a whole, Austria ranks 12th in the overall index of equality of participation in education and income. With its education expenditures and with the early-segmented school system, Austria ranges only in the midfield in terms of PISA's competences. With regard to the share of tertiary qualifications and to the objective capability of the population to autonomy as a whole, Austria is somewhat below the international average. If one takes into account the high satisfaction of the population with the freedom of choice of the way of life, Austria is slightly above the average of the 43 countries considered in the overall index of objective and subjective autonomy.

In the representation of women in parliament, Austria is now among the top ten. In terms of the proportion of female students and of women's employment quotient, Austria is only in the midfield. Austria thus reaches place 15 among the 43 countries considered with regard to the overall index of women-friendliness. With regard to the admission of migrants, Austria is above the international average, but in terms of naturalizations, Austria ranges in the last third. If we take into account the strong inequality of persons with a background of migration in the education system and on the labour market, Austria also belongs to the last third of the 43 countries considered in the overall index of migrant-friendliness.

In terms of the integration of its citizens into the employment system and the labour market, Austria is among the first third of the countries. Austria is among the first ten countries with regard to the participation in politics and trade unions. In the overall index of social integration, Austria thus ranks 9th among the 43 countries considered.

Switzerland

Type and development trend

The Swiss welfare state contains components of mainly two types of regimes: the conservative and the liberal. This is reflected, among other things, in the social insurance schemes and, above all, in the first pillar of pension insurance, the AHV: it represents a compromise between Beveridge's and Bismarck's principles, poverty avoidance and status conservation. In addition, it is contributory in funding and is nevertheless universalist in the benefits. In addition, the private sector is strongly emphasized both in pension and health. Thus, the AHV only insures the basic security of the insured, the personal need beyond that must be covered by private supplementary insurance. Here, as well as in the high private expenditure on health, the liberal orientation of Swiss welfare is reflected, which is also reflected in the economic system.

The conservative character is particularly evident in cultural aspects, especially in the model for gender roles. Even though the rate of women's employment in Switzerland is relatively high, most women, especially after the birth of children, are only part-time employed. The reason for this is the still traditional division of labour in pairs, in which women have the task of family care. The dominance of the model of traditional gender roles is also shown by the fact that there are hardly any childcare facilities for children under four years, nor are there one-day nursery schools or schools (see Bonoli 2006, p. 1387).

All in all, Switzerland was conservative with economically liberal elements (see Bonoli 2006), with an approximation to the continental model after 1990 (see Trampusch 2010).

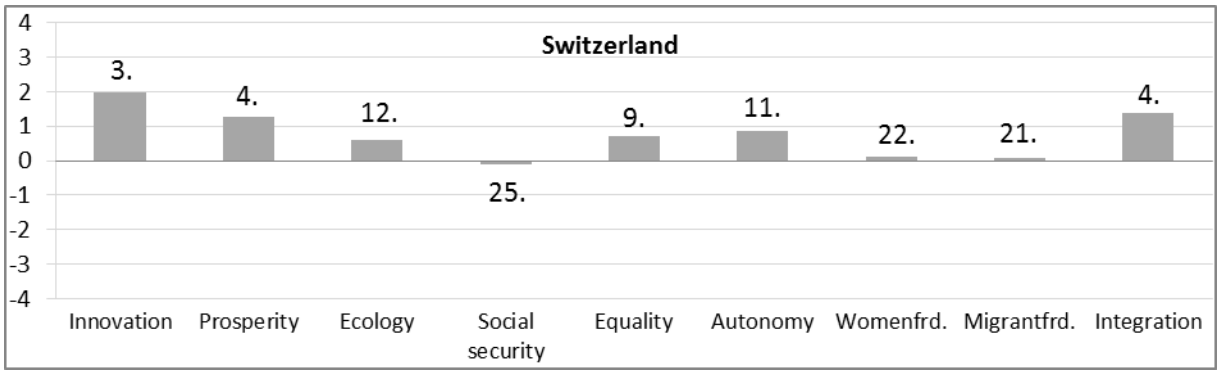
The latest developments can best be characterized as "modernization" (see Häusermann 2010a): the improvement of the child care facilities supports the modernization of the gender roles and the employment of women. The disadvantage of part-time work in the calculation of pensions has been reduced. The labour market policy has been converted to activation from an aftercare Bismarck policy.

As a result, the welfare logic of Switzerland is most likely a modernized version of the status-conserving logic with some economically liberal features. And under the new government (since December 2017), politics will become more conservative.

The performance profile of Switzerland

Among the countries of continental Europe, in addition to Germany and Austria also Switzerland is now the most likely to be attributed to the conservative welfare logic (see Trampusch 2010), but with some economically liberal elements.

Figure 4-3: The performance profile of Switzerland



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

Switzerland is particularly at the forefront with regard to private investments in research and development. In the case of the important patents, Switzerland is now even at the top of the 43 countries considered (before Japan). All in all, Switzerland achieves a good third place in its ability to innovate. This is the basis for the fact that Switzerland also reaches a good fourth place in terms of average prosperity, with neutrality in all military conflicts being a further favourable condition. As a downside to prosperity, Switzerland is one of the last ten countries with regard to the high ecological burden, especially in terms of both the amount of garbage and of the heavy use of nuclear technology. As to the relief efforts, on the other hand, Switzerland achieves a good third place, because it performs well in energy efficiency and in the share of organic agriculture.

With regard to the social welfare expenditures, Switzerland ranges on place 27 among the 43 countries considered. However, with regard to the income poverty rate, wealthy Switzerland is still in the first third of the countries. In terms of investments in the education system, Switzerland is in the upper midfield. On this basis, Switzerland achieves a small proportion of early school leavers and an average proportion of risk-readers in the sense of PISA. In the overall index of the equality of participation in education and income, Switzerland thus ranks among the top ten of the countries considered. According to the reading competency, Switzerland has deteriorated to the international average, which is likely due to the increased migration. In terms of the objective capability of the population to autonomy, Switzerland is in the upper midfield. Taking into account the high satisfaction of the population with the freedom of choice of the way of life (rank 2), Switzerland belongs to the first third of the 43 countries considered in the overall index of objective and subjective autonomy.

Switzerland has improved in the representation of women in parliament and in the labour force, and now belongs to the first third of the 43 countries considered each. But with its low share of female students, Switzerland ranges among the last ten. Overall, Switzerland has improved to the international average with regard to the overall index of women-friendliness. With its linguistic and cultural diversity, Switzerland is very accessible to migrants; correspondingly, it admits the second highest proportion of migrants. However, with regard to the participation of the migrants in the education system and on the labour market, Switzerland ranges below the international average each. In total, therefore, Switzerland is in the international average in the overall index of migrant-friendliness.

In view of the integration into the employment system, Switzerland is at the very top of the 43 countries considered and on second place in terms of its integration into the labour market. Switzerland is in the first third as to the participation in civil society. In the overall index of social integration, Switzerland thus reaches the fourth place.

Belgium

The Benelux countries can also be attributed to the conservative type of welfare, albeit with considerable deviations. The welfare arrangement of Belgium is closest to the conservative ideal type, which is why the country is the first to be analyzed.

Type and development trend

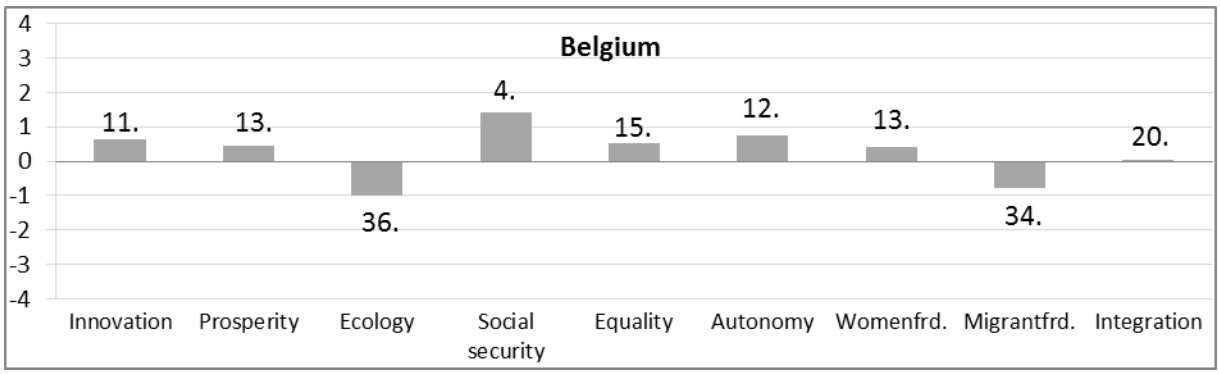
The Belgian social protection system has a large number of conservative characteristics, so it can clearly be attributed to this type of welfare logic: the insurance principle, which is based on the labour force and whose benefits are proportional to the previous wage; furthermore, the family status is always taken

into account, when determining benefits. Only social assistance, which pursues a universalist approach, as well as the partial financing of the social systems through taxes, deviate from this principle. The model for gender roles also points to the affiliation to the conservative welfare regime: even if a well-developed childcare offer is aimed at establishing greater equality between the sexes in the labour force participation, there is a strong gender-specific segmentation of the labour market.

The performance profile of Belgium

In private spending on research and development as well as in the spread of internet use and in the important patents, Belgium belongs to the first third each. Overall, Belgium reaches place11 in the overall index of innovation capacity. In the 1960s, the transition from the dominance of the coal and steel industries to the modern service economy, which now accounts for more than two-thirds of GDP, was achieved in Belgium. The export rate is almost 90 %. On the basis of the modernized economic structure, Belgium reaches place 13 in terms of average prosperity. As downside of prosperity, Belgium's high ecological burden is among the last ten of the 43 countries considered, i.a. because of the too high share of the nuclear technology. With regard to the relief efforts, Belgium belongs to the last third. In the overall index of ecological sustainability, Belgium ranges among the last ten of the 43 countries considered.

Figure 4-4: The performance profile of Belgium



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

With regard to the social welfare expenditures, Belgium reaches place 3 of the 43 countries considered. On this basis, Belgium achieves a low income inequality. With regard to the share of risk-readers in the sense of PISA, Belgium is in the international average. In terms of the equality of participation in education and income as a whole, Belgium still belongs to the first third of the 43 countries considered. In terms of the share of total educational expenditures in GDP, Belgium reaches place 8 among the 43 countries considered. On this basis, Belgium is at the beginning of the midfield with regard to the reading

competency according to PISA. Belgium is then also at the beginning of the midfield in the objective capability of the population to autonomy as a whole. Taking into account the satisfaction of the population with the freedom of choice of the way of life, Belgium belongs to the first third of the 43 countries considered in the overall index of subjective and objective autonomy.

In terms of the representation of women in parliament, Belgium is one of the top ten. In the proportion of female students, in the employment quotient and in the income quotient, Belgium performs worse. In the overall index of women-friendliness, Belgium thus belongs to the first third of the 43 countries considered. – In terms of openness for migrants, Belgium has deteriorated and is now slightly below the international average. With regard to the participation of the migrants in the education system and on the labour market as a whole, Belgium belongs to the last third. In the overall index of migrant-friendliness, Belgium therefore also ranges in the last third of the 43 countries considered. – The poor integration of Muslim migrants in the Brussels district "Molenbeek" has already become known by headlines.

In view of the integration of the population into the employment system and the labour market as a whole, Belgium belongs to the last third. Participation in trade unions is good and Belgium is among the top ten in terms of the integration in civil society as a whole. In the overall index of social integration, Belgium is roughly in the average of the 43 countries considered.

Luxembourg

Type and development trend

The system of social protection in Luxembourg corresponds to the contribution-financed Bismarck insurance system. However, it is subsidized to a considerable extent by the state, which assumes a share of the social insurance contribution of each insured person. This results in a comprehensive protection against risks, but also a high level of cost, which is also reflected in the additional costs incurred by the company. Therefore, more responsibility shall be given to citizens with regard to pension, incapacity for work and health care.

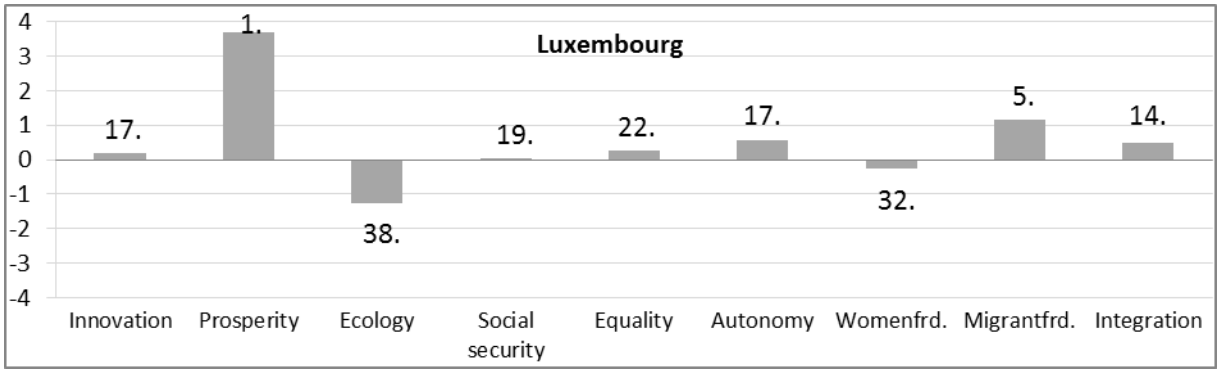
On the whole, however, Luxembourg can be attributed to the conservative welfare regime, which can be traced back, among other things, to cultural aspects, in particular to the still dominant "male-breadwinner model" in the Catholic Luxembourg.

The performance profile of Luxembourg

As a city state and international financial services center, Luxembourg has some special features. The average prosperity is by far at the top of the 43 countries considered, which is less based on innovation than in the other countries, but

rather in the special role of a financial services center in the international division of labour. When measuring percentages of GDP, it must be borne in mind that, given an absolutely very high GDP, expenditure on a good level as a proportion is relatively lower compared to other countries. This also applies to the share of public expenditures on research and development in GDP, which belongs only to the last third. Luxembourg's share of private expenditures on research and development is in the international average. With regard to the spread of internet use and to the most important patents, Luxembourg belongs to the first third each. In the overall index of innovation capacity, Luxembourg is thus in the upper midfield. Because of its special role in the international division of labour, the prosperity of Luxembourg is markedly higher than to be expected according to its innovative capacity. As downside of its high prosperity, Luxembourg ranges third to last with its high ecological burden. As city state, it is even at the very end with regard to the CO_2-emissions. Also in the relief efforts, Luxembourg ranges only at the end of the midfield. In the overall index of ecological sustainability, Luxembourg is among the last ten of the 43 countries considered.

Figure 4-2: The performance profile of Luxembourg



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

With regard to social welfare expenditures, Luxembourg is on place 14 of the 43 countries considered. In terms of the aftercare social expenditures, Luxembourg is at the beginning of the midfield and this also applies to the comparatively low share of income poverty and relatively small income inequality. Based on its low share of educational expenditures, Luxembourg is among the last third of the 43 countries considered in terms of the share of risk-readers according to PISA. In the overall index of the equality of participation in education and income, Luxembourg is then in the international average. In terms of the share of total educational expenditures in GDP, Luxembourg ranges on place 30 among the 43 countries considered. With regard to the average reading competency according to PISA, Luxembourg ranges only at the end of the midfield, although it is very prosperous. In terms of the share of tertiary

qualifications and of the share of top readers, Luxembourg ranks above the average, so that in the case of the overall objective capability of the population to autonomy, Luxembourg is about in the international average. Taking into account the above-average satisfaction of the population with the freedom of choice of the way of life, Luxembourg is in the upper midfield with regard to the overall index of objective and subjective autonomy.

In Catholic Luxembourg, traditional gender roles dominate: In the representation of women in parliament, Luxembourg still belongs to the upper midfield, but with regard to the female share of students and to the income quotient, Luxembourg ranges in the last third each. In the overall index of women-friendliness, Luxembourg also belongs to the last third of the 43 countries considered. A strong point of Luxembourg is its openness for migrants. With its very high share of migrants, Luxembourg ranks at the top of all 43 countries considered. In terms of the overall participation of the migrants in the education system and on the labour market, Luxembourg is about in the international average. With regard to the overall index of migrant-friendliness, Luxembourg thus reaches place 5 among the 43 countries considered. – In the field of refugee policy, too, Luxembourg belongs to the top group and the regulations are seen as exemplary.

In terms of the integration into the employment system and into the labour market as a whole, Luxembourg is roughly in the international average. With regard to the participation in politics and trade unions, Luxembourg is among the top ten. In the overall index of social integration, Luxembourg then ranks at the beginning of the midfield of the 43 countries considered.

France

Type and development trend

In its basic structure, the social insurance system organized by professions, France corresponds to the type of status-conserving welfare state. However, some deviations from this pattern can be observed. Thus, the social security system is no longer financed solely by employers 'and employees' contributions, but increasingly by taxes and fees. This suggests a departure from the system of status-conserving insurance and a movement towards universalist approaches. This is also the case for the general health insurance CMU for persons, who are not able to pay contributions due to unemployment or the like.

The concept for gender roles also differs from the typically conservative: the "dual-earner model" has widely gained ground in society, which is made possible by the comprehensive range of childcare facilities.

Overall, France can therefore be described as a conservative welfare state, which also contains some universalist elements.

As a trend, Bruno Palier (2010c) diagnoses "dualization" of French society: On the one hand, the "insiders" insured by the social security systems receive the services more and more proportionally to the premiums paid. On the other hand, the "outsiders" get tax-financed and need-tested basic security, linked to measures to activate and increase employability for the labour market.

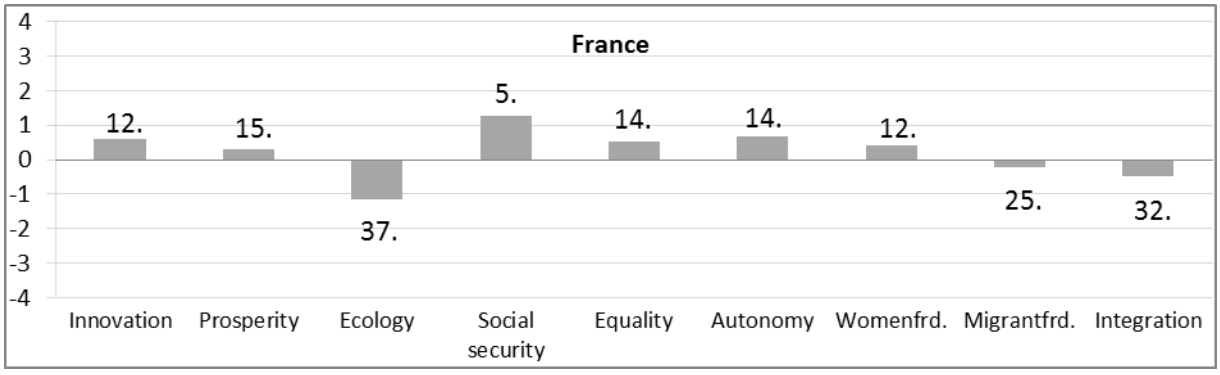
Hence, the social security systems remain in the "proportional" Bismarck tradition, but the uniform basic security must be used by a growing proportion of needy.

Under the new President, Emmanuel Macron (since May 2017), who is independent and pro-European, a "modernization" of the institutions is to be expected. A liberalization of labour law has already been introduced in order to reduce unemployment and strengthen France's competitiveness.

The performance profile of France

With regard to private and public expenditures on research and development, France belongs to the first third each. This also applies to the most important patents and then to the overall innovation capacity. The average prosperity of France ranks at the end of the first third of the 43 countries considered. With its high ecological burden, France belongs to the last five of the 43 countries considered, because it puts the most emphasis on the nuclear risk technology from all countries. This (nuclear) power policy is historically understandable, but not rational. On the other hand, France is in the international average with regard to the relief efforts.

Figure 4-6: The performance profile of France



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

In view of social welfare expenditures, France is at the very top of the 43 countries considered. With these comprehensive social welfare benefits, France has a low relative poverty rate (place 7). The relatively small income inequality

still belongs to the first third of the countries considered. In the share of total educational expenditures in GDP, France reaches place 16 among the 43 countries considered. In the case of the total expenditures on education for precaution, France is therefore in the upper midfield, thus overall reaching a proportion of early school-leavers and a share of risk-readers in the sense of PISA in the international average. In the overall index of the equality of participation in education and income, France belongs to the first third of the countries considered. The high share of total educational expenditures in GDP is reflected in the results of the education system. With regard to the average reading competency according to PISA, France is in the upper midfield and in terms of the share of top readers on place 5 of the 43 countries considered. In the case of the objective capability of the population to autonomy as a whole, France belongs to the first third of the countries.

In terms of the representation of women in parliament, France is slightly above the international average. With the pronatalist infrastructure policy for mothers, France achieves a high female employment rate. As to women's income quotient, France belongs to the first third. This also applies to the overall index of women-friendliness. With regard to the admission of migrants, France is slightly above the international average. In terms of the participation of the migrants in the education system and on the labour market, France is slightly below the international average. That is why France is roughly in the international average in the overall index of migrant-friendliness.

With regard to the integration in civil society, France is in the upper midfield. But in terms of economic integration and of personal integration, France counts to the last third. That is why, in the overall index of social integration, France also belongs to the last third of the 43 countries considered.

Netherlands

Type and development trend

The Dutch welfare state contains both conservative and universalist elements. This can be seen clearly in the structure of the social insurance system, which is the basis for social protection. In addition to corporatist labour insurance, which is based on the Bismarckian tradition, there are universalist national insurances, open to all the inhabitants of the Netherlands.

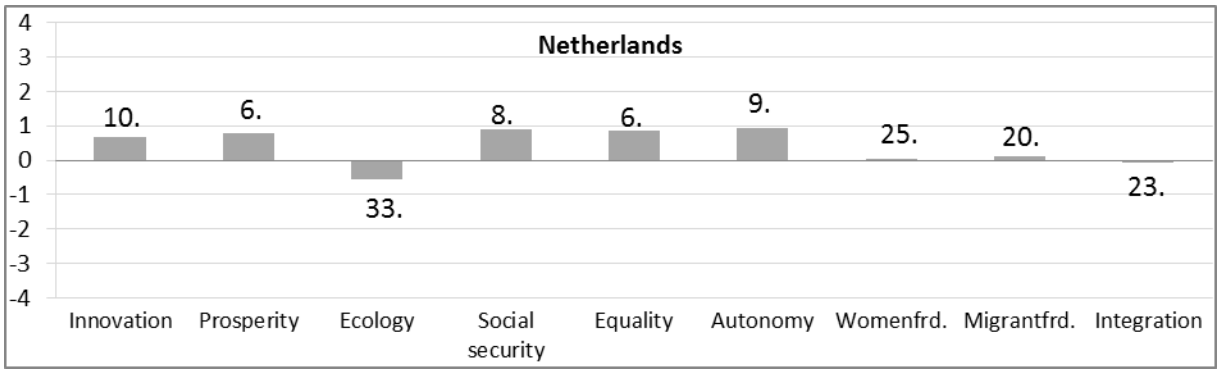
However, due to the "male-breadwinner model", still predominant in spite of all openness, the Netherlands are culturally more oriented in the conservative direction. Due to the widespread part-time work of women, gender roles are now partially modernized.

Overall, the Netherlands can best be attributed to the conservative welfare regime type, albeit with some social-democratic and economically liberal elements.

The performance profile of the Netherlands

In view of private and public spending on research and development, the Netherlands belong to the first third. They are among the top ten in the spread of internet use and the important patents each. In the overall index of innovation capacity, the Netherlands reach place 10 among the 43 countries considered. On this basis, the Netherlands are also among the top ten with regard to average prosperity. As a downside of high prosperity, the ecological burden is slightly above the international average. With regard to the use of regenerative energies and to the relief efforts as a whole, the Netherlands belong to the last third each. This also applies to the overall index of ecological sustainability.

Figure 4-7: The performance profile of the Netherlands



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

With regard to the social welfare expenditures, the Netherlands are on place 11 among the 43 countries considered. On this basis, the Netherlands are among the top ten in income inequality and relative income poverty each. In the case of all educational expenditures, the Netherlands are also in the first third and on this basis they are in the upper midfield in terms of educational poverty. In the overall index of equality of participation in education and income, the Netherlands achieve a good sixth place. With regard to the share of total educational expenditures in GDP, the Netherlands reach place 7 among the 43 countries considered. On the basis of the high total expenditures on education, the Netherlands are in the first third with regard to the reading competency according to PISA. In the case of the objective capability of the population to autonomy as a whole, the Netherlands are in the first third. In the overall index of objective and subjective autonomy, the Netherlands also belong to the best third of the 43 countries considered.

In the representation of women in Parliament, the Netherlands belong to the first third. In the case of the female employment quotient, the Netherlands are above the international average, while the proportion of female students is below the average. That is why the Netherlands are about in the international average with

regard to the overall index of women-friendliness. With regard to the openness for migrants, the Netherlands are above the international average. In terms of the participation of the migrants in the education system and on the labour market, the Netherlands are slightly below the international average. Thus, the Netherlands are slightly above the international average in the overall index of migrant-friendliness.

The Netherlands are at the forefront of the integration into the employment system, in particular through the part-time employment of many women. In terms of overall economic integration, the Netherlands belong to the first third, while in personal integration on the other hand to the last third. With regard to the participation in civil society, the Netherlands are in the international average. In the overall index of social integration, the Netherlands are then also roughly in the international average.

4.3 Performance of the conservative countries of Continental Europe

In the countries with conservative welfare logic, there is generally a relatively high standard of living, combined with a rather good and comprehensive social protection for the citizens (see table 4-1). Nevertheless, some shortcomings of this regime type can be identified, so that the performance of the conservative countries is behind the countries of the social-democratic welfare-regime type. In the following, the individual placements of the conservative countries with regard to the eight performance criteria will be discussed in more detail, as well as attempts to trace them partly to the welfare logic of the regime type, the ideas of the policies and the correspondingly designed institutions of the countries.

In terms of investment in research and development as well as in the overall index of innovation capacity, the continental European countries are all above the international average. Switzerland even reaches the top position in the important patents and the third place in the overall index of innovation. For Germany, the eighth place in the area of innovation, is, besides the good social integration (rank 5), the best placement of all performance criteria.

Accordingly, all continental European countries are also above the international average with regard to the average standard of living. As an international financial services center and city state, Luxembourg even ranks at the top of the 43 countries considered and Switzerland on the fourth place. Innovative economies and well-developed social security systems as stabilizers contribute to this high prosperity.

As a downside of high prosperity, all countries in continental Europe have high environmental impacts and are above the international average, with the exception of Austria. This is most pronounced for the city state of Luxembourg as well as for France and Belgium, the two latter focus much too heavily on nuclear technology. With its high share of sustainable agriculture, Austria

reaches the top position among all 43 countries considered, and this also applies to the overall relief efforts. The "conservation" of nature is also respected above-average in Switzerland. On the other hand, the Benelux countries also rank clearly below the international average for relief efforts. In the overall index of ecological sustainability, Austria is on second place and Switzerland is still in the first third, while Germany is only at the beginning of the last third due to its high environmental impact. The Benelux countries and France, with its focus on nuclear power, also range in the last third of the 43 countries considered in the overall index of ecological sustainability.

Table 4-1: Performance profiles of the conservative countries

Country	Inno-vation	Pro-sperity	Eco-logical sustain-ability	Social security	Equality of partici-pation	Auto-nomy	Women-friend-liness	Mig-rant-friend-liness	Social integra-tion
Belgium	0,63	0,44	-1,00	1,42	0,52	0,76	0,40	-0,78	0,06
	11	13	36	4	15	12	13	34	20
Germany	1,22	0,63	-0,39	0,40	0,41	0,75	0,07	-0,34	0,97
	8	9	31	15	18	13	24	28	5
France	0,60	0,30	-1,15	1,29	0,53	0,69	0,41	-0,20	-0,46
	12	15	37	5	14	14	12	25	32
Luxem-bourg	0,21	3,69	-1,25	0,03	0,25	0,58	-0,26	1,17	0,50
	17	1	38	19	22	17	32	5	14
Netherlands	0,67	0,78	-0,57	0,90	0,85	0,95	0,02	0,10	-0,06
	10	6	33	8	6	9	25	20	23
Austria	1,23	0,61	1,45	0,86	0,58	0,56	-0,06	-0,65	0,70
	7	10	2	9	12	19	27	33	9
Switzerland	1,99	1,27	0,60	-0,10	0,70	0,86	0,10	0,09	1,37
	3	4	12	25	9	11	22	21	4

Indicated are the z values (top line) and rank places (bottom line) of the countries for the examined performance criteria.

With regard to the aftercare spending of the welfare state, the conservative countries - with the exception of Switzerland - are well above the international average, whereby France is even on the first and Belgium on the third place. Germany also performs well with the ninth place. In Switzerland, on the other hand, *private* spending on health and pension provision is above average, which is the economically liberal component in the Swiss welfare logic. As to the share of total educational expenditures (GDP) for precaution, almost all conservative countries are also somewhat above the average, but Germany is slightly below

that, and Luxembourg performs even worse, although the tertiary area is missing and the very high GDP p. c. is to be taken into account. In terms of the overall index of social protection through prevention and aftercare, Belgium and France reach the good places four and five; all other conservative countries in continental Europe are also above the international average. The conservative states of Continental Europe therefore have altogether well-developed social states.

With too much educational poverty, Luxembourg, France and Belgium range below the international average, Austria is on average, and the Netherlands and Germany are slightly better. The strength of the conservative welfare states lies less in the prevention by education than in the aftercare of the welfare state. Because of the well-developed welfare states, with a low income poverty risk, all continental European countries are better off than the international average. The Netherlands are even ranked third. In the overall index of equality of participation in education and income, the Netherlands reach place 6. Switzerland, Austria, France and Belgium still belong to the first third of the countries. Germany is slightly above the international average and Luxembourg is about in the international average. Due to the well-developed welfare states, all the continental European countries are therefore generally performing properly in the equality of participation in education and income.

In terms of the objective capability of the population to autonomy, all continental European countries are above the international average. If one considers the important indicator of average reading competency according to PISA, then Germany reaches place 8 and the Netherlands is ranked 13th. The Austrian school system with its early primary selection performs worse, and this also applies to Luxembourg because of its high proportion of migrants. With regard to subjective autonomy, all conservative countries of Continental Europe are also above the international average. As to the satisfaction of the population with the freedom to choose the way of life, Switzerland even reaches the second place among the 43 countries considered.

With regard to the overall index of women-friendliness, France and Belgium are still in the first third. Switzerland, Germany and Austria are roughly in the international average, while Catholic Luxembourg, with its more traditional gender roles, already ranges in the last third of the 43 countries considered.

As to the admission of migrants, all countries in Continental Europe are now above the international average, with the small Luxembourg by far at the very top and the multilingual Switzerland in second place of the 43 countries considered. However, with regard to the participation of migrants in the education system and on the labour market, all conservative countries in Continental Europe are below the international average, with Switzerland, Austria and especially Belgium performing particularly poor. In the overall index of migrant-friendliness, Luxembourg is thus in fifth place, the Netherlands

and Switzerland are roughly in the international average, France and Germany are in the lower midfield, while Austria and Belgium belong to the last third of the 43 countries considered.

In view of economic integration, i.e. integration into the employment system and the labour market, Switzerland, Germany, the Netherlands and Austria belong to the first third, whereby Switzerland ranks even at the very top of the 43 countries considered. Belgium and France, on the other hand, range in the last third in terms of economic integration. As to the participation in civil society, all continental European countries are above the international average. In the overall index of social integration, Switzerland, Germany and Austria count to the top ten countries among the 43 countries considered. The Benelux countries are in the midfield. Of the conservative countries of Continental Europe, only France ranges in the last third of the counties with regard to social integration.

Altogether, the seven conservative countries of Continental Europe are not as homogenous as the four social-democratic countries of Scandinavia, but they also form a recognizable grouping in terms of performance.

5. The economically liberal Anglo-Saxon welfare regime

5.1 Commonalities and particularities of the economically liberal countries

Commonalities

The countries of the Anglo-Saxon welfare regime, the United States, Canada, Australia, New Zealand, Great Britain and Ireland, have a number of common characteristics. They have largely liberalized markets, i. e. they are hardly regulated by the state. The belief in the balance between supply and demand as a natural regulatory mechanism of the economic system is prevailing, which is to make an intervention by the state superfluous. On the basis of this logic, the market is regarded in these countries as the most important welfare institution, second only to the family, and lastly, to the state's welfare in its relevance.

The autonomy of the individual is as much as possible in the residual welfare state, the personal performance (ability) plays a decisive role. At the same time, the individual bears the responsibility for his or her well-being as well as for socioeconomic risks, which are only partly supported by the state or employers. In practice, this system of regulation leads altogether to wealthy societies which, however, have marked social and regional disparities. The countries in question have in common that the state becomes active only with regard to the care gaps which cannot be closed by the "free play of the market forces", but only after various means-tests have been carried out and the persons concerned have proved their need.

The influence of trade unions is in this regime type traditionally comparatively weak. In the last thirty years, it was additionally weakened by state intervention (Great Britain, New Zealand). For this reason, there is little scope for employees to enforce their rights or for work-securing measures. While at the beginning of the twentieth century wages should be high enough to feed a family (male-breadwinner model), the cost of living has increased since the 1980s, but average wages have not. At the same time, a growing socioeconomic inequality was generally observed.

Characteristic for this type of welfare is a flat-rate performance, which is granted at a low level in a universal way and often does not guarantee the basic requirements. In doing so, previous salaries are often disregarded. Private precautionary measures – e. g. in relation to retirement – have priority over state benefits. These are not taken for granted, but are conditioned on need tests. On the labour market, the trend in the last thirty years has been toward activation. Jobseekers should be encouraged to accept jobs by means of a general shortage of services or income subsidies. This development led to an increasing number of the so-called "working poor", especially in the USA.

Similarly, the health system of the countries analyzed mainly provides a basic supply and makes further service dependent on the individual payments of the persons concerned. For this reason, the share of private expenditures in the health care system and in the other welfare sectors is high compared to other OECD countries. As a result, the divergent financial possibilities of individuals are reflected in different safeguards and room for the prevention of social risks (unemployment, illness, old age).

State spending on education is generally high in the countries of the economically liberal welfare type; however, these education systems also have a high share of private funding. This results in an unequal distribution of access opportunities to education and the possibility of social advancement, dependent on the budges of the private households. Only a small part of the population benefits from the current system and has access to high-quality or advanced higher education. For a large part of the population access to the tertiary education sector is difficult for financial reasons.

With regard to gender equality, there is a relatively high variance between the countries considered, which will be addressed in the peculiarities. In general, one can speak of "gender neutrality", that is, the state does not intervene, or only rarely, interfere with the relationship between the sexes. While there is no institutional discrimination, there are differences in the opportunities between the sexes. In general, the group with the highest risk of poverty is that of the mothers, who single parents are. In contrast to the conservative and familistic welfare regime, a generally higher employment rate of women is apparent, which results from the logic of the self-responsibility of the individual.

In the Commonwealth, a voluntary alliance of sovereign states, Great Britain, Northern Ireland and former colonies such as Canada, Australia and New Zealand coordinate on selected topics.

Particularities

The **United States of America** are mentioned first because of the least deviations from the ideal type of the economically liberal welfare regime among the countries studied. They thus form the prototype of this type of welfare regime.

In general, the range of services has been severely limited since 1981. The scope of services was lowered and the criteria for the authorization were raised. These measures follow the activation logic of the "workfare instead of welfare", typical of the economically liberal countries. Since the responsibility for unemployment insurance and social assistance lies with the individual states, the benefits vary from state to state. Social assistance is not available in all states and only for a limited time. The benefits are very low, amounting to about half of the previously received income. Low paid workers often receive income subsidies through tax reductions. In this way, the incentive to take up work shall be increased. Over the past 15 years, this system has resulted in a sharp increase in working poor, which depend on government transfers. Since the protection of workers is very low, the practice of "hire and fire" has established itself, so that employment relationships are sometimes not only associated with low pay, but also unstable.

By 2010, the USA was the only developed country without a government-funded healthcare system: 18% of the population had no health insurance. Although health expenditures are relatively high by OECD standards, private provision plays a major role, with benefits dependent on the income of their beneficiaries. This also applies to the pensioners. For them, the state provides after a means test support payments and food stamps.

Both public and private expenditures on education are above the OECD average. This fact can be explained by the logic of the preference of prevention (investment in education, i.e. in the self-reliance of the individual) before aftercare (through social benefits in the case of need). However, access to the education system is selective. A high proportion of these means flows into the tertiary education sector. But it is the primary and secondary education, that already sets the course for the individual's later chances. In addition, private spending also plays an important role in the education system, which is relatively high at around 30 % of total educational expenditures. The private co-payments decide on the quality of the received training.

Canada is similar to the United States in terms of high expectations of individual responsibility and low levels of social protection. The trend is from universal to residual benefits. Again, low-paid employment is increasingly being

subsidized by need-tested tax rebates. Overall, social benefits are more generous than in the USA. Unlike its economically liberal neighbour, unions in Canada are more influential. Larger transfers through tax rebates effect, that the poverty rate in Canada is lower than in the USA and social inequality is less pronounced.

Overall, Canadian education spending is slightly above the OECD average. This is due to the high private share of about a quarter of total educational expenditures. Heavily increased fees make it difficult for children from less affluent families to enter higher education. The Canadian pension is low but universally paid to all retirees. In the health system, benefits are low, but unlike the USA, this is universal. The state is largely "gender neutral". For example, both parents can claim parental leave and receive benefits. In addition, mothers can go into maternity leave and receive non-means-tested, lump-sum benefits for a relatively long time. This state support is untypical for countries of this welfare type.

As a former British colony, **Australia**'s welfare policy and institutions were originally shaped by the British model. Today its public welfare system is residual, need-tested, targeted and non-contributory. Freedom of contribution exists, because one suspects that paid-in contributions could entail claims. The labour market is not completely deregulated. For example, employers have to pay their employees certain social benefits. An exception is the health care system, which is financed by shares of the employee's salary. Restrictions on the economy and the labour market have been eroded since the 1980s. Precarious and part-time work increased, so that at the turn of the millennium, one-fifth of workers were dependent on state transfers. Noticeable in the Australian welfare state is the lack of social insurance as a primary institution of social security. Since the 1980s, social services have increasingly been organized by public-private partnerships. In the area of labour market policy another peculiarity emerges, because instead of state unemployment assistance or reactivation measures, there are only private job centers, which, however, receive government support and are paid for placement success.

The welfare policies of the conservative and social-democratic governments differed relatively strongly; some reforms were reversed under the subsequent government. Nevertheless, the country as a whole moved in the direction of the economically liberal type. This happened e.g. during the liberal-national coalition government under prime minister John Howard from 1996, whose program was based on paternalistic mutual commitment and reintroduced joint taxation of couples abolished in the 1960s; a step that was revised by the Labor Government from 2007.

New Zealand is similar to Australia in terms of characteristics and developments of its welfare system, which is related to the close ties between the two dominions of Great Britain. Likewise, as of 1984, a move away from the universalist welfare logic towards the economically liberal one began, cutting

social benefits. From 1990 this policy was extended to the labour market, which was severely deregulated. The influence of the unions was restricted. The consequence of this restructuring policy was a higher poverty rate and larger income differences.

From 1989, social services were partially outsourced from the state and handed over to private actors. All social benefits are funded from tax revenue, which corresponds to the Australian logic, and distributed through tax credits, following the activation logic (benefits are tied to income or employment). Total retirement pensions are below the OECD average. Public and private education spending is higher than the OECD average.

Unlike in Australia, there are no paternalistic tendencies regarding state gender relations; taxes are levied per individual, not per cohabitation. In addition, the state has recognized the particular poverty risk of single parents and provides them with special support services.

In the **United Kingdom**, legislation on the protection of workers was adopted relatively early in comparison to other European countries. Based on the Beveridge Report of 1942, comprehensive and universal social benefits were introduced in a second phase. This universalist model has been continuously curtailed since the reign of prime minister Margaret Thatcher in the 1980s. Thatcher's government made sweeping cuts in social benefits and weakened unions. The government under prime minister Tony Blair from 1997 shaped the term "New Labour", as it saw social security ensured by a growing economy, while the welfare state was seen as merely having an activating role. The criteria of means test have been tightened for several years. Income inequality and social segregation are increasing. This is unlikely to change in the near future. With Britain also plagued by the global financial crisis, the conservative-liberal coalition, who was in power since 2010, immediately ordered large-scale cuts in social benefits, affecting especially families with children, retirees, students and welfare recipients.

Social assistance benefits are low and severely need-tested. This goes back to the principle of the "Poor Law" of 1838, which distinguished between "helpless" (deserving) and "able-bodied" needy. Social assistance partly works in addition to income. The most important components of the British welfare state are education and health care, again in line with the principle of preventive care before aftercare. As a result of austerity measures from 2010, tuition fees have been drastically increased, which will make it more difficult for children from financially weak families to move up the social ladder. Healthcare is the remnant of the previous welfare system, least touched by cuts. In the health sector, the state has been involved in public-private partnerships for several years. In addition to the flat-rate basic pension, which is dependent on the number of insurance years, a supplementary earnings-related pension is paid. There is far-reaching gender neutrality. Mothers are entitled to maternity

benefits. Furthermore, there are support services for fathers. Britain today is much closer to the economically liberal logic than to the social-democratic welfare logic.

Although **Ireland**'s welfare is influenced by this model as a former British colony, the country has nevertheless several peculiarities and therefore holds a special position. Until the 1970s, it was one of the poorest countries in Europe and lived mainly on agriculture. Only at the end of the same decade did industrialization and tertiarization begin. At the beginning of the 1980s, Ireland was in a serious economic crisis. A peculiarity is the reaction of politics to this: it formed "social partnerships", in which various social and political actors – the government, employers, trade unions and voluntary and community associations – from a comprehensive perspective (not only poverty alleviation, but also avoidance of social exclusion) jointly developed strategies for welfare policy. Such corporatist arrangements are atypical of the economically liberal states. The resulting social program was so successful that the model continued in the 1990s. Ireland entered a period of considerable economic growth in the 1990s. The government then invested particularly in health and education (which corresponds to the liberal economic principle of prevention rather than aftercare). However, not all parts of the population benefited from the upswing. At the same time, the labour market was deregulated. In 2009, as a result of the banking and financial crisis, Ireland was again hit by a severe recession and launched an extensive austerity program that included cuts in the social sector.

Another untypical component is the existence of social solidarity, which manifests itself not only in terms of joint negotiation processes, but also in the regulation of some welfare areas. For example, child and elderly care work largely informally on the basis of interfamilial or neighbourly agreements. The Catholic character of the country (80 % of the population are Catholics) is also a peculiarity. The Catholic Church is traditionally involved in welfare and provides services through its organizations. Until the 1990s, the male-breadwinner model was predominant, with the number of female workers increasing by nearly 60 % between 1995 and 2004. Because of these peculiarities, Ireland can be characterized as an economically liberal welfare type with some conservative components.

The Irish school system is completely free of charge, which also applies to higher education. However, structural characteristics effect, that children from socio-economically better off families are nevertheless privileged. In contrast, the public health system is less developed. It is funded by tax credits, but only emergency medical care is included in the free, no-cost benefits. For a sufficient basic care the conclusion of a private health insurance is necessary.

5.2 Case studies on the individual countries

USA

Type and development trend

Over the last two decades, there has been a trend towards greater recommodification. President Obama's health care reform has shown a desire to restructure the United States in terms of reducing social inequality. The USA is still an economically liberal welfare state due to the residual character of the welfare state. There is no sign of a change of this characterization, as there is little pressure from the direction of US trade unions; liberal values and the appreciation of individual responsibility for their own destinies are firmly anchored in the population.

Also at the federal level, there are likely to be no big changes in favour of the welfare state. The decentralization of structures and levels of responsibility (e.g. in social assistance and unemployment benefits) makes the change in social policy in general difficult. Low levels of taxation and high levels of public debt, due to individual state competition for low corporate taxes, leave little leeway for social programs.

The health care reform launched by president Obama (from 2009 onwards) was a milestone for the US welfare system. That is why we have to characterize this reform with Pierson's broadest formulation of "recalibration" and "updating", because a whole new program has been created for big problems. In order to expand the support base, an attempt was also made to increase efficiency (rationalization) and limit costs (cost containment). The reform was designed to be path-dependent, as no statutory health insurance was introduced, as in the conservative model of Continental Europe, but the uninsured should be given access to health care markets. Therefore, in Hall’s terminology, this is not a "3rd order change", because the basic logic of the welfare regime has not been touched. Of course, by greatly increasing the number of health insureds, this is a quantitative change (i.e. of 1st order) and, through the introduction of general compulsory insurance, a change in the hierarchy of policy objectives (i.e. 2nd order change). Nevertheless, the market orientation of the economically liberal welfare logic was not called into question by this relevant reform.

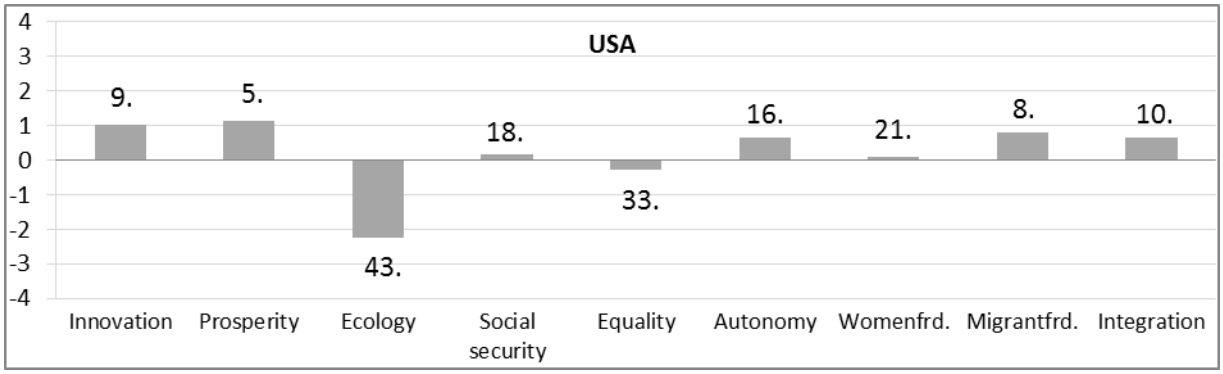
The presidential election in November 2016 was won by Republican Donald Trump with a program focused on job creation, counter-terrorism and domestic security. "Obamacare" should be replaced by a new system, which would work without compulsory insurance and with incentives rather than sanctions, which of course is more popular. However, a reduction in funding is expected, which would partially reverse the social success of "Obamacare" under the new presidency. While Trump has not yet found a majority in parliament for the reversal of Obama's health care reform, Trump's tax reform was passed in

December 2017, according to which company taxes will be cut from 35 to 21 percent.

The performance profile of the USA

In view of private and public spending on research and development, the USA belongs overall to the top ten among the 43 countries considered. On this basis the USA also achieves a place among the top ten in terms of the spread of the internet use and of important patents, as well as in the overall index of innovation capacity. In average prosperity, the USA reaches even place 5, which is particularly due to the benefits of the world power status and of the role of the key currency. The USA's focus on quantitative economic growth is reflected in the downside of the highest ecological burden among the 43 countries considered. In terms of e.g. CO_2-emissions and waste pollution, the USA ranges at the bottom. The USA is also among the last five with regard to the relief efforts. In the overall index of ecological sustainability, the USA then ranges at the very end of the 43 countries considered.

Figure 5-1: The performance profile of the USA



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

With regard to the expenditures of the welfare state, the USA ranges on place 28 among the 43 countries considered. In line with the economically liberal logic of individual responsibility, the USA is thus in the lower midfield in terms of spending on social protection; as to both income poverty and income inequality, the USA even belongs to the last ten. With regard to the share of total education spending in GDP, the USA reaches place 13 among the 43 countries considered. The USA is firmly committed to prevention through education rather than aftercare by the welfare state. A high percentage of the population obtains a tertiary degree. In terms of reading competency according to PISA, the USA belongs to the upper midfield. As to the objective capability of the population to autonomy, the USA counts to the first third. Taking into account the satisfaction of the population with the freedom of choice of the way of life, then the USA is in the upper midfield in the overall index of objective and subjective autonomy.

As a prototype of the economically liberal welfare logic, the USA ranges under the international average as to the aftercare of the welfare state, but in the first third with regard to the provision through education.

In the representation of women in parliament, the USA ranges in the lower midfield, but the proportion of female students, women's employment quotient and women's income quotient puts the USA overall in the upper midfield. This then also applies to the overall index of women-friendliness. The USA is doing relatively well in integrating migrants. As a classical country of immigration, they belong to the first third of the countries considered with regard to the admission of migrants and to naturalization, and to the top ten in terms of participation of the migrants in the education system and on the labour market. In the overall index of migrant-friendliness, the USA reaches place 8 among the 43 countries considered.

In terms of economic integration, the USA belongs to the upper midfield. On the other hand, union membership is below average. I.a. because of the ethnic heterogeneity and the orientation towards the individual, the labour movement historically has remained relatively weak. Participation in clubs, communities, parties etc. is well developed. As to the integration in civil society, the USA counts therefore to the upper midfield. In the overall index of social integration, the USA is in the first third of the 43 countries considered.

Canada

Type and development trend

Canada, like the USA, is classified as an economically liberal state, although it took this path a little later than its neighbour since the early 1990s. The unions are more present and active than in the USA. Nevertheless, Canada has a welfare state of residual character.

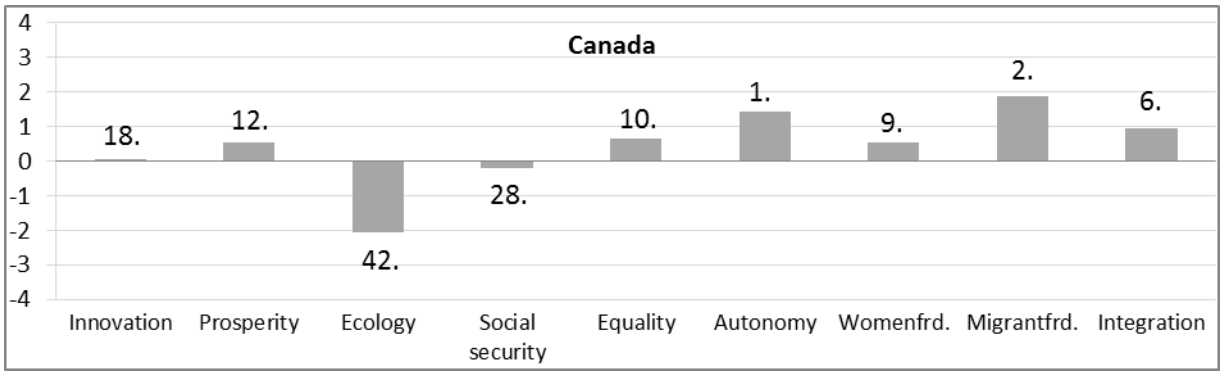
The Kyoto Protocol was terminated by the conservative government under prime minister Stephen Harper. However, after 10 years under a conservative government, the citizens voted in October 2015 to switch to a liberal government under prime minister Justin Trudeau. The program of the new government includes, on the one hand, the expansion of public investments and, on the other hand, greater consideration of environmental protection. There is also a change in refugee policy towards increased admission of refugees. The change is also reflected in the 50 percent women's quota in the new cabinet.

The performance profile of Canada

With regard to both private and public investments in innovation as well as in the overall output, Canada ranks in the upper midfield. This then also applies to the overall index of innovation capacity. In terms of average prosperity, Canada achieves place 12 among the 43 countries considered, as it remained relatively

unharmed by the financial crisis because of its well-regulated banking sector. As a backside of high prosperity, Canada ranges in the third to last place with regard to the ecological burden, and only among the last ten as to the relief efforts. Canada thus ranges second to last in the overall index of ecological sustainability (followed only by the USA). The Kyoto Protocol was terminated by the conservative government under prime minister Stephen Harper. However, after ten years under a conservative government, the citizens voted in October 2015 to switch to a liberal government, whose program includes i.a. the greater consideration of environmental protection.

Figure 5-2: The performance profile of Canada



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

According to the economically liberal logic, Canada belongs to the last third of the countries considered with regard to aftercare social expenditures. In terms of income poverty risk, Canada ranges in the lower midfield. On the other hand, Canada is in the upper midfield in educational spending as precaution. Correspondingly, it has few risk-readers in the sense of PISA. In the overall index of equality of participation in education and income, Canada thus reaches place 10 among the 43 countries considered. Canada has about the highest percentage of tertiary educated people and has improved in average reading competency according to PISA as well as in the share of top readers to the first place each. That is why Canada is now at the top of all countries considered in terms of the objective capability of the population to autonomy. This then also applies to the overall index of objective and subjective autonomy.

With regard to the women's employment quotient, Canada is among the top five. In terms of the women's income quotient, it belongs to the first third. In the overall index of women-friendliness, Canada thus reaches place 9 among the 43 countries considered. Under the new government of the Liberals, a female quota of 50 percent has been realized in the cabinet, so one can expect a further improvement in women-friendliness.

Canada is particularly exemplary in the integration of migrants. In terms of openness for migrants, it is one of the top three; and with regard to the participation of migrants in the education system and on the labour market as a whole, it belongs to the top four. In the overall index of migrant-friendliness, Canada ranks second behind Australia and ahead of New Zealand, the other two traditional immigration countries.

In view of economic integration and of the participation in civil society, Canada belongs to the first third of the countries each. Because Canada counts to the top ten of the 43 countries in terms of integration into the personal support networks, it achieves a place among the first ten of the 43 countries considered in the overall index of social integration.

Australia

Type and development trend

The Labor government from 2007 onwards was more committed to environmental protection than its predecessors. For example, in 2007 prime minister Rudd signed the Kyoto Protocol. This government promoted immigration more than the previous ones and also tried to give refugee policies a more humane face. In integrating migrants through education, the country is proving particularly successful. In the parliamentary elections in September 2013, the Labor Party was i.a. because of internal power struggles replaced by a conservative government under Tony Abbott, who wanted to redevelop the budget with a rigid austerity policy. But he was replaced in September 2015 as party chairman and thus as prime minister by Malcolm Turnbull, who declared, as one of its priorities, innovation including the expansion of regenerative energies. In the elections in July 2016, the liberal-conservative government was confirmed.

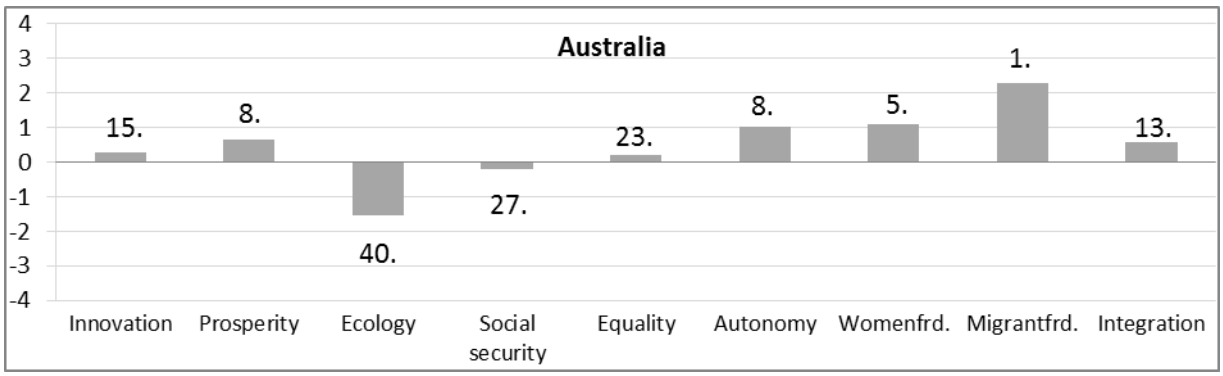
Despite relative protection of workers through laws and various benefits to them, as well as protectionist measures regarding their own labour market and domestic production, Australia continues to follow largely the economically liberal welfare logic.

The performance profile of Australia

With regard to public and private investments in research and development, Australia is in the first third, slightly lower in terms of the spread of internet use and in patents. In the overall index of innovation capacity, it is at the end of the first third. Especially due to its extensive trade with China, Australia reaches even place 8 in terms of average prosperity. As backside of the high prosperity, Australia ranges among the last five with regard to the ecological burden; for example, in terms of CO_2-emissions it is penultimate. Australia is among the last ten in terms of the relief efforts. In the overall index of ecological sustainability, Australia ranges on place 40 among the 43 countries considered.

In terms of the aftercare expenditures of the welfare state, Australia is on place 29 of the 43 countries considered. As a result of the economically liberal welfare logic, Australia also ranges at the end of the midfield as to its large income poverty. Australia's share of total educational spending in terms of GDP is on place 21,5 among the 43 countries considered. Australia's overall educational expenditures for prevention are thus roughly in the international average. This then also applies to the overall index of the equality of participation in education and income. According to the PISA measurements, the education system of Australia is successful. There is a below-average proportion of risk-readers, and with regard to the students' reading competency, Australia belongs to the first third. In the objective capability of the population to autonomy, Australia is at the end of the first third. Taking into account the high level of satisfaction of the population with the freedom of choice of the way of life, Australia reaches place 8 among the 43 countries considered in the overall index of objective and subjective autonomy.

Figure 5-3: The performance profile of Australia



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

With regard to the representation of women in parliament and to the proportion of female students, Australia belongs to the upper midfield each. In the women's employment quotient, it ranges in the first third and in women's income quotient on place 2. In the overall index of women-friendliness, Australia thus reaches place 5 among the 43 countries considered. In terms of migrant-friendliness, Australia scores best of all 43 countries considered. Australia, together with Luxembourg and Switzerland, has the highest proportion of migrants and, unlike the other two countries, belongs also to the top with regard to the participation of migrants in the education system and on the labour market. This is why in the overall index of migrant-friendliness, Australia is slightly ahead of New Zealand and Canada and ranks at the very top of the 43 countries considered. – Furthermore, the participation of the indigenous population of the Maori shall be improved by appropriate measures.

In view of the integration of the entire population into the employment system and into the labour market, Australia belongs to the first third each. In terms of integration in civil society, Australia is in the lower midfield, but it belongs to the top as to the integration into personal support networks. Hence Australia ranks among the first third of the 43 countries considered in the overall index of social integration.

New Zealand

Type and development trend

New Zealand is to be characterized as an economically liberal welfare state. While the country had a well-functioning welfare system before 1984, this changed fundamentally with the reforms of the 1980s and 1990s. This change of course, in response to a recession and high public spending, has created growing social inequality, which has not been markedly reduced by the withdrawal of some measures by the Labour government (1999-2008). It can be described as a path change from a comprehensive to an economically liberal social system.

New Zealand was hit hard by the global economic crisis of 2008/2009 because of its export dependency. The severe earthquake in Christchurch in 2011 also hit the country hard; reconstruction and compensation for those affected required billions of extra expenditures.

While New Zealand has hardly any problems with poverty and unemployment in times of full employment, things are different today. Although unemployment has fallen again since the 1990s, work has become more precarious since the 1980s due to the deregulation of the labour market, and in some cases the wage no longer allows to live on it without additional payment, which has led to the phenomenon of "working poor".

While workers' rights have been curtailed, New Zealand is open to migrants, but on closer inspection this is especially true of the well-qualified. This selective migrant-friendliness follows the same market logic, which explains the decline of the concept of "citizen" behind that of "labour", according to which people are mainly defined. Educational and co-operation programs with business shall help to bring unemployed people back into the labour market.

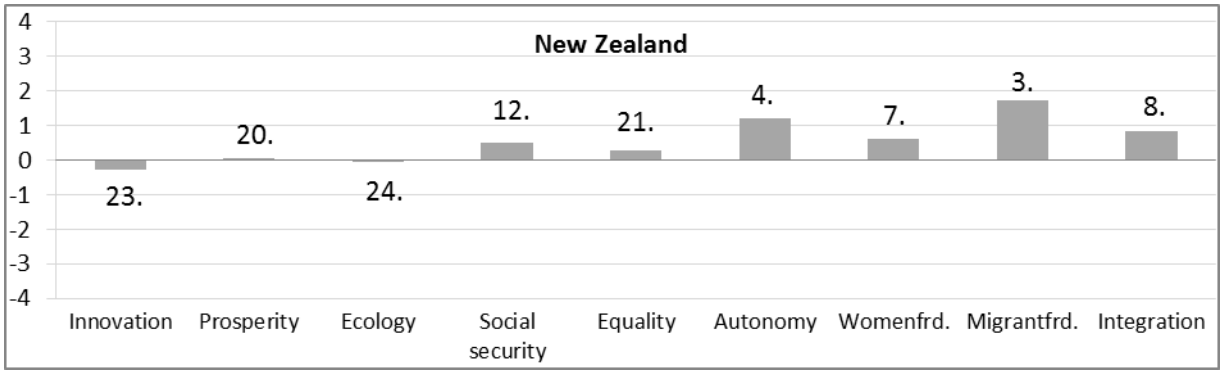
Under the new Labour government (from October 2017 onwards), however, another course is to be expected: the minimum wage shall be raised and child poverty shall be reduced.

The performance profile of New Zealand

New Zealand's private and public spending on research and development is in the lower midfield, the spread of internet use is above average and with regard to important patents New Zealand is roughly in the international average. The

latter also applies to the overall index of innovative capacity. In terms of average prosperity, New Zealand is also about in the international average. With regard to the ecological burden, New Zealand is roughly in the international average, whereby it renounces the risk of nuclear energy technology. In terms of relief efforts, New Zealand is slightly above the international average, with New Zealand ranking 6th in the use of renewable energies. In the overall index of ecological sustainability, New Zealand is thus about in the average of the 43 countries considered.

Figure 5-4: The performance profile of New Zealand



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

With regard to the expenditures of the welfare state, New Zealand is on place 24 among the 43 countries considered. In terms of social spending, New Zealand is thus roughly in the international average, which also applies to the income poverty rate and to income inequality. On the other hand, New Zealand invests heavily in prevention through education. With regard to total spending on education New Zealand reaches place 9 among the 43 countries considered. Hence it has comparatively few risk readers in the sense of PISA. With regard to the equality of participation in education and income, New Zealand is thus roughly in the international average. On the basis of the high investments in education, New Zealand achieves a higher than average proportion of tertiary degrees; and it ranks 8th in the average reading competency according to PISA and 3rd in terms of the share of top readers. Altogether, New Zealand ranks fifth in terms of the objective capability of the population to autonomy. Taking into account the high level of satisfaction of the population with the freedom of choice of the way of life, New Zealand reaches place 4 among the 43 countries considered in the overall index of objective and subjective autonomy.

As to the representation of women in parliament, New Zealand belongs to the first third. With regard to the proportion of female students and to the employment quotient, it ranks sixth each. In the overall index of women-friendliness, New Zealand thus reaches place 7 among the 43 countries considered. With

regard to the admission of migrants, New Zealand belongs to the top. In the participation of the migrants in the education system and on the labour market, it is among the top five each. Thus New Zealand reaches place 3 in the overall index of migrant-friendliness (behind Australia and Canada).

In terms of economic integration, New Zealand ranks among the top ten. With regard to the participation in civil society, it is roughly in the international average. Because the personal support networks are well developed, New Zealand reaches place 8 among the 43 countries considered in the overall index of social integration.

United Kingdom

Type and development trend

In the United Kingdom, different trends emerged in the twentieth century: on the one hand, there was a strong belief in individual responsibility, a residual welfare state, and means-tested benefits, which covered only the bare necessities. On the other hand, there were universal, comprehensive and non-contributory benefits, with particular emphasis on health and education, in line with the idea of preventive care before aftercare. Because of this heterogeneous spectrum, the UK formed a mixed welfare state containing both social-democratic and economically liberal elements.

From the 1980s, however, the economically liberal welfare logic prevailed. Benefits were cut, institutions outsourced by the state, partially privatized and handed over to the market. Access to the allocation of benefits to the needy has been made more difficult, the central idea is that of "activation". This development continued with the "Third Way" of the labour government in 1997-2010, although isolated initiatives were undertaken in line with their social-democratic tradition (such as childcare services). The situation of the needy has worsened again in 2010 with the savings decided by the conservative-liberal government. The education sector is also affected by this; the increase in tuition fees will hamper social advancement for low-income high school graduates.

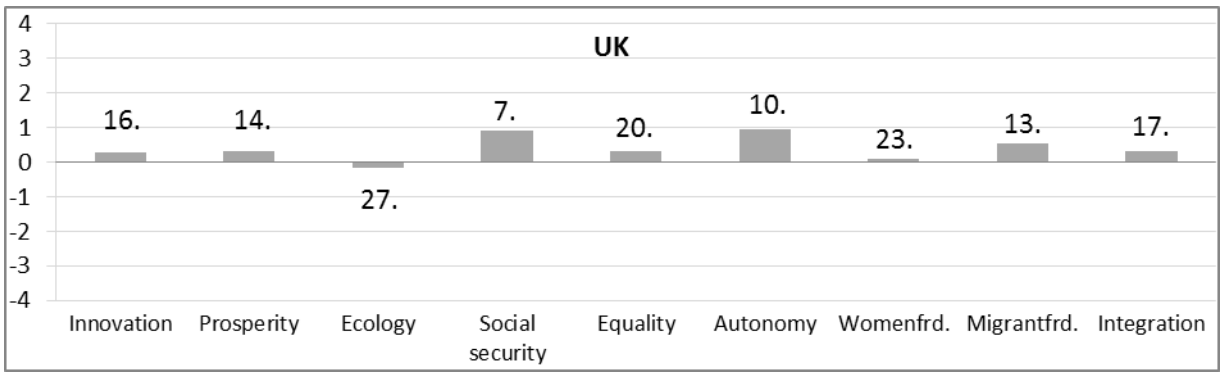
The beginning of the economic recovery from 2014 reduced unemployment and contributed to the alleviation of social problems. The new prime minister, Theresa May, who has been in office since July 2016, pledged to mitigate the policy of budget consolidation, but there is still no sign of a turnaround in welfare policy. In addition, negotiations with the EU on the modalities of "Brexit" will absorb a lot of energy.

The performance profile of the United Kingdom

With regard to private and public spending on research and development, the UK is in the upper midfield of the 43 countries considered. In terms of the spread of internet use and of key patents, the United Kingdom belongs to the

first third each. In the overall index of innovation capacity, the UK is leading the upper midfield. This then also applies to the average prosperity achieved. As a backside of the prosperity level, Great Britain belongs to the lower midfield with regard to the ecological burden. The UK uses little renewable energy and ranges also in the lower midfield in terms of the relief efforts and in the overall index of ecological sustainability.

Figure 5-5: The performance profile of the United Kingdom



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

In view of welfare state spending, the UK is on place 20 among the 43 countries considered. In terms of social welfare expenditures, the UK is thus in the upper midfield, and this also applies to the income poverty rate and income inequality. In terms of the share of overall educational spending in GDP, the UK reaches place 4 among the 43 countries considered. With regard to prevention through investments in education, the UK thus belongs to the first ten. With the below-average share of risk readers according to PISA, the UK is in the upper midfield, this then also applies to the overall equality of participation in income and education. As to the satisfaction of the population with the freedom of choice of the way of life, the United Kingdom belongs to the first third. Together with the good objective capability of the population to autonomy, the UK ranks also in the first third with regard to the overall index of objective and subjective autonomy.

With regard to the representation of women in parliament and to the employment quotient, the UK is slightly above the international average and in terms of the income quotient below the average. In the overall index of women-friendliness, the United Kingdom is thus roughly in the international average. In terms of openness for migrants, Great Britain is in the upper midfield. In terms of the participation of the migrants both in the education system and on the labour market, the United Kingdom counts to the first third, and this then also applies to the overall index of migrant-friendliness.

In terms of economic integration, the United Kingdom now belongs to the first third of the 43 countries considered. Britain is in the upper midfield in terms of integration in civil society, and this then also applies to the overall index of social integration.

Ireland

Type and development trend

Politics in Ireland are dominated by two conservative parties. The social-democratic party has no marked influence. Politics is shaped by corporatist partnerships. Although the proportion of working women has risen sharply since 1995, caring and care responsibilities continue to be largely taken over as informal arrangements between women within and between families. Social services are partly outsourced from the state to private providers, whereby the state only funds them. The principle of subsidiarity plays a major role.

Until the social cuts in the 1980s, social benefits had a redistributive effect. Not all parts of the population benefited from the economic boom, which hit the Irish economy in the 1990s. The social differences continued to grow. The Irish economy today is dominated by a liberal logic, although not as comprehensive changes have been made to the welfare state as in the UK. However, based on the development of the past 20 years, the Irish model seems to shift from the conservative-liberal type towards an even more economically liberal welfare state. This is evidenced by the fact, that in recent years it has been increasingly geared towards activation, more need-testing has been used and altogether benefits are at a low level.

The coalition government of the conservative Fine Gael with the Labour Party from 2011 continued the policy of fiscal consolidation. In the parliamentary elections in February 2016, the coalition of the conservative prime minister Enda Kenny (Fine Gael) lost the government majority because of the unpopular austerity policy. As of May 2016, Enda Kenny formed a minority government in consultation with seven independent MPs. In June 2017, Kenny handed over governance to party colleague Leo Varadkar, who became the new prime minister and, as a half-Indian, also symbolizes Ireland's openness for migration. The government continues to focus on strengthening the economy, which already has high growth rates, on reducing unemployment and on cutting public debt.

Culturally, Ireland is rather conservative, as shown in particular in the gender roles. But overall, the economically liberal welfare logic dominates, with speculation by private banks leading to the crisis. The public debt due to the bank rescue had to be carried by the citizens.

The performance profile of Ireland

With regard to private spending on research and development, Ireland is in the upper midfield; this also applies to the spread of internet use and to the important patents, and finally, to the overall index of innovation capacity. In terms of average prosperity, Ireland, as the "Celtic tiger", was one of the climbers of the last decade, with very low corporate taxation of 12,5 %, attracting large companies and thereby promoting growth. Due to the unsuccessful oversized speculation of the private banks, the state was forced to rescue the systemic banks, which caused the state itself heavily indebted. With the support of the IMF and the EU, Ireland has managed to emerge from the crisis. In terms of average prosperity, Ireland is now in second place among the 43 countries considered, due to the contributions of multinational enterprises. As a back side of high prosperity, Ireland is on the other hand only in the international average in terms of ecological burden, as it performs poorly in terms of waste and CO2-emissions, but refrains from using the risk technology of nuclear power. Ireland is in the upper midfield in terms of relief efforts, and this also applies to the overall index of ecological sustainability.

Figure 5-6: The performance profile of Ireland

Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

In view of the total welfare state expenditures, Ireland reaches place 23 among the 43 countries considered. In terms of social welfare spending Ireland is thus in the international average. With regard to income poverty and the extent of income inequality, Ireland is overall in the upper midfield. According to the economically liberal welfare logic, the priority is correspondingly stronger in precaution and empowerment. As to the share of total educational expenditures in GDP, Ireland reaches place 12 among the 43 countries considered. Thus, Ireland's spending on education belongs to the first third. As a result, this leads to low educational poverty (place 3), which is why Ireland ranks on place 7 among the 43 countries in terms of the equality of participation in education and income. With its high proportion of tertiary degrees and good reading compe-

tency according to PISA, Ireland is among the first ten with regard to the objective capability of the population to autonomy. This also applies to the subjective assessment of the freedom of choice of the way of life by the population. In the overall index of objective and subjective autonomy, Ireland reaches place 7 among the 43 countries considered. Hence, the priority lies in the prevention through education, corresponding to the economically liberal welfare logic.

As a Catholic country, traditional gender roles still dominate in Ireland, while the liberal economic system is modern, creating pressure to change. In terms of the representation of women in parliament, of the share of female students and of women's income quotient, Ireland ranges in the last third each. This then also applies to the overall index of women-friendliness. In terms of openness for migrants, Ireland is among the first ten. As to the participation of the migrants in the education system and on the labour market, Ireland counts to the first third in each case. In the overall index of migrant-friendliness, Ireland ranks seventh among the 43 countries considered.

With regard to the integration into both the employment system and into the labour market, Ireland belongs to the lower midfield, but as to the participation in politics and trade unions, it is in the first third. In the overall index of social integration, Ireland thus belongs to the upper midfield.

5.3 Performance of the economically liberal Anglo-Saxon countries

In the following, an attempt is made to attribute the performance of the countries with economically liberal welfare type (see Table 5-1) partly to the welfare logic of the regime type, the guiding principles of the policies, and the correspondingly designed institutions.

The logic of the production and distribution of welfare in the economically liberal welfare regime is based ideally on the guiding principles of the individual's responsibility as well as the effectiveness of competition and markets. This "harsh climate" favours the labour market integration of the whole population, since there is no alternative, and by the competition also a relatively high average prosperity, which, however, is distributed very unevenly, since the state should ideally intervene as little as possible in the markets. But in reality, e.g. the US governments are pragmatic enough to pursue a forced growth policy in order to limit the unemployment of potential voters. In the education system, economic liberalism ideally relies on the universalism of equal opportunities and competition, although too little account is taken of the unequal starting conditions. As a result, the universalism of the economically liberal education systems, according to the PISA measurements, proves to be more successful than the logic of the "talent suited" educational programs of the status-conserving welfare regime. The gender neutrality of the economically liberal

logic leads to better outcomes in terms of gender equality than the logic of the gendered division of labor of the conservative and of the familistic welfare regime. One of the strong points of the economically liberal logic is its openness for migration, since, ideally, competition is to be restricted as little as possible and the benefits of diversity for innovation and growth are recognized. However, migration is by meanwhile regulated in terms of the skills and labour required for the local economy, so there is no pure market logic. But in the admission and in the participation of the migrants admitted, the economically liberal countries are in the lead.

Table 5-1: Performance profiles of the countries of the economically liberal welfare type

Country	Innovation	Prosperity	Ecological sustainability	Social security	Equality of participation	Autonomy	Women-friendliness	Migrant-friendliness	Social integration
Australia	0,28	0,67	-1,55	-0,19	0,19	1,02	1,08	2,29	0,58
	15	8	40	27	23	8	5	1	13
UK	0,28	0,31	-0,16	0,91	0,31	0,94	0,09	0,54	0,32
	16	14	27	7	20	10	23	13	17
Ireland	0,00	1,84	0,11	0,42	0,77	1,09	-0,43	0,93	0,21
	19	2	20	14	7	7	36	7	18
Canada	0,01	0,52	-2,07	-0,21	0,66	1,42	0,53	1,87	0,95
	18	12	42	28	10	1	9	2	6
New Zealand	-0,27	0,00	-0,05	0,51	0,29	1,20	0,61	1,71	0,84
	23	20	24	12	21	4	7	3	8
USA	1,02	1,15	-2,24	0,16	-0,28	0,64	0,11	0,79	0,65
	9	5	43	18	33	16	21	8	10

Indicated are the z values (top line) and rank places (bottom line) of the countries for the examined performance criteria.

With regard to innovation capacity, the countries with economically liberal welfare logic are predominantly in the upper midfield; but New Zealand is only in the international average, while the USA performs best with place 9. In terms of average prosperity, some of the economically liberal countries are doing even better: The US achieves a good fifth place with its world power status and its key currency of world trade. Australia in eighth place has come well through the global financial crisis, especially because of trade with Asia. Canada, with its well-regulated banking system without a rescue program, has come unscathed by the global financial crisis, finishing twelfth. Due to the relocation of multinational companies to Ireland, it is, as a special case, in second place in average prosperity, according to IMF data, behind Luxembourg and just ahead of Norway. Great Britain is in the upper midfield in terms of average prosperity

as well as of innovation. New Zealand's prosperity and innovation capacity are in the international average. All in all, countries with economically liberal welfare logic do well in terms of average prosperity, but there is a great inequality in the distribution of prosperity.

As backside of high prosperity, the United States, with its great ecological burden, ranges at the very end and Canada second to last, Australia fifth to last. With regard to relief efforts, the United States, Canada and Australia are among the last ten of the 43 countries considered. In the overall index of ecological sustainability, among the economically liberal countries only New Zealand and Ireland are roughly in the international average, while the USA ranges at the end of all 43 countries considered, Canada as second to last and Australia as fourth to last. The priority on economic growth without much regard for the environment is thus very clear in these economically liberal countries.

In terms of social protection, the economically liberal countries all have a priority for prevention through investing in education and training rather than aftercare by the welfare state. The USA, Canada, the United Kingdom and New Zealand are all better at providing precautionary education than aftercare by ca. 15 rank places. The largest investments in education are to be found in the UK (rank 4), New Zealand (9), Ireland (12) and the USA (13). With regard to the aftercare of the welfare state, the USA, Canada and Australia range markedly below the international average. In all countries with economically liberal welfare logic, there is a preference for prevention through education instead of aftercare by the welfare state.

Accordingly, one finds rather less educational poverty in the economically liberal countries than income poverty. The most pertinent case is Canada, which, with its high income poverty, ranges markedly above the international average, but achieves a good third place with little educational poverty on the basis of few risk readers in the sense of PISA. A similar pattern applies to the USA and Australia. In the UK and Ireland, the European influence can be seen in that income poverty is there also below the international average. The objective capability to autonomy and the subjective assessment of the freedom of choice of the way of life are strong points of the economically liberal countries. In terms of objective autonomy, all economically liberal countries belong to the first third, with Canada even leading the list of all 43 countries considered. Canada ranks at the very top in terms of both the average reading competency according to PISA and the proportion of top readers. In the overall index of objective and subjective autonomy, Canada, New Zealand, Ireland, Australia and the UK belong to the first ten and the USA to the upper midfield. Autonomy is thus strongly developed in all economically liberal countries.

Corresponding to the economically liberal welfare logic, the state is neutral in terms of gender roles, the state shall not intervene. As a result, Australia, Canada and New Zealand belong to the first ten in the overall index of women-

friendliness, and the US as well as the UK roughly in the international average; only Catholic Ireland is a runaway down and ranges in the last third, because the Catholic confession is even more important for the model of gender roles than the economically liberal welfare logic.

One of the strong points of the economically liberal countries is the migrant-friendliness. As countries of immigration, the Anglo-Saxon nations have developed in many years of learning the reception and treatment of migrants, whereby English as the most important international communication language was surely helpful. In the overall index of migrant friendliness, Australia, Canada and New Zealand rank at the very top of the 43 countries considered. They are at the forefront in terms of openness for migrants and also perform well as to the participation of the migrants. Ireland, the United States and the United Kingdom also belong to the first third of the countries with regard to migrant-friendliness.

In the overall index of social integration, the Anglo-Saxon countries are all above the international average. Ireland is lagging behind in terms of economic integration due to the economic crisis, while the other economically liberal countries are all well above the international average. With regard to the integration into personal support networks, New Zealand, Australia and Canada belong to the top.

Overall, the countries with economically liberal welfare logic also form a clearly recognizable group in terms of performance: the high level of prosperity is accompanied by high ecological burdens. The population is well enabled to autonomy and is content with the freedom of choice of the way of life. Last but not least, the Anglo-Saxon countries are above average open to the world, as shown by the admission of migrants.

6. The familistic welfare regime of Southern Europe

6.1 Commonalities and particularities of the familistic countries

Commonalities

Many similarities between the countries of the familistic welfare type can be explained by a similar historical development. All Southern European countries have in common that, compared with other European states, they are still very young states, either forming after a dictatorship or becoming independent after a period of colonialization. The dictatorship hindered the development of a rational administration. The lack of a bureaucratic organization, which favors the development of a "welfare patronage" (see Ferrera 1996, p.10), is one of the causes of the difficult development and implementation of a welfare system.

In addition to the political regime, the Church, as a further institution, has a great influence on the values and political activities of these nations, with a more stable and far-reaching scope than policy. In all Southern countries, the Church has a great influence on the family model and the distribution of roles between men and women, as well as on political decisions. This influence, however, is currently being pushed back more and more.

In the economy, predominantly there is a trend towards economic liberalism, with similar problems occurring in all familistic countries. The export weakness and the large shadow economy in these countries could not be eliminated so far. High expenditures on the social insurance systems are also a major problem. They can only be partially covered by the contributions and must therefore be co-financed by state subsidies, which leads to high debt levels in many countries of Southern Europe.

Further similarities can be seen in the family image and the gender roles assigned. The "male-breadwinner model" dominates all the nations of Southern Europe, characterized by a low female employment rate (with the exception of Portugal, which as poor country generally requires dual earners) and the lack of support for childcare. Although the families have many responsibilities for care work, public expenditures on families are below the international average. This has resulted in the most marked declines in birth rates since around 1960 in international comparison.

In the social insurance systems of the familistic countries, there is a strong discrepancy between persons integrated into the labour market and those who are outside the regular labour market, which points to a dualistic character. This is particularly evident when comparing the generous pensions and the only rudimentary protection of unemployed persons. These poor safeguards are reflected in the comparatively high poverty rates in these nations. In order to gain a balance with the dualistic security system, the families play a very strong role in the welfare sector of the countries of the South, which is strongly supported by the values promoted by the church and politics.

The similarities in the structure of the social security systems can be summarized in four aspects: Firstly, in the case of income security, one finds a highly fragmented and corporatist system, whereat a distinction is made between different professional groups. The second feature involves the efforts to make the health system universal, but which is complemented by private security because of the lack of funding. A third common feature is the relatively weak role of state intervention in the social security systems and the heterogeneity of the actors involved, especially in the health systems. The fourth point relates to the continuing clientelistic structures and the patronage systems which differ in their strengths in the familistic countries, but are present in all (Ferrera 1996). This leads to differences in the amount of the transfer among the different groups of insured persons, so the social systems are very particularistic.

In contrast to the economically liberal welfare regime, private expenditures on education are below the international average. Public expenditures on education are below average in both welfare regimes.

Particularities

One characteristics of **Italy** is its very unstable politics. Over the past sixty years, there have been more than fifty parliaments, as well as changing and unstable coalitions. The governmental alliances are often been dissolved early. Such circumstances complicate a continuous policy, which is why the orientation of social policy is constantly changing. Italy must reduce regional disparities between the developed north and the less developed south. Another problem is the strong clientelistic structures and the extensive patronage systems.

A peculiarity of the **Spanish** welfare system is its strong decentralization, in which some national competences have been handed over to regional governments. This can be attributed to the strong autonomy aspirations of the individual regions such as Catalonia, the Basque Country and Andalusia. The current dispute over autonomy rights in Catalonia shows that the distribution of competences has not yet been negotiated well enough.

Portugal has an exceptional position in terms of female employment within the southern European countries. The extent and continuity of female employment differ significantly from those of the other states. The high proportion of women in employment results from the economic necessity in relatively poor Portugal.

In no other southern European country has the church such a large influence on politics as in **Greece**. The discrepancy between the rights of women and men appear to be especially great in Greece. The adherence to the "male-breadwinner model" by the church hitherto prevented an independent protection of the individual and strengthened the dependence of the family members on the income recipient. The financial effort to meet the Maastricht criteria for the European Monetary Union left little resources for the development of public benefits, which was only partially offset by EU programs. Social protection is also too strongly focused on aftercare by the welfare state rather than on provision by educational investments. The actual extent of Greece's over-indebtedness has only become public over time. EU and IMF financial assistance has been linked to comprehensive restructuring requirements.

The division of **Cyprus** and the resulting special political situation prevented Cyprus' governments from adopting a unified social policy. (In our analysis, only the Greek part of Cyprus is taken into account.) The debate over the national question pushed social policy into the background.

On the one hand, **Malta**'s welfare system is strongly influenced by the British colonial era. Above all, the health care system is designed according to the

British National Health Service. On the other hand, Malta is heavily influenced by the Catholic Church and has the lowest female employment rate among the familial countries.

6.2 Case studies on the individual countries

Italy

Type and development trend

In Italy, care work is thought to be the responsibility of the women in the families ("familistic"), but at the same time there is very little state support for families. This contributes to a low female employment rate and a low birth rate.

There is a strong insider/outsider problem in the area of employment. The social security systems are status-conserving at a rudimentary level. The main focus of expenditures is on pensions, the enabling by education is comparatively less supported. The administrations are rather weak, clientelism and patronage are widespread.

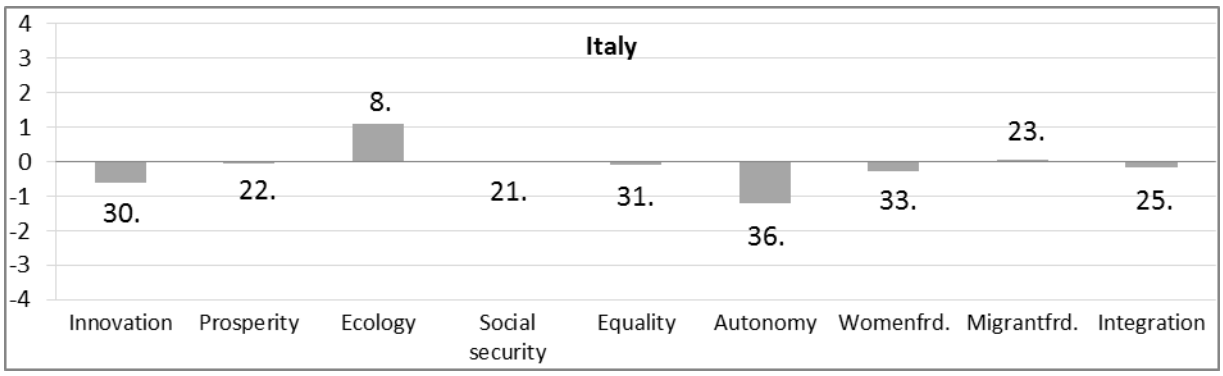
After the new elections in February 2013, the first large coalition in Italy, led by the social-democrat Enrico Latta, came, then from February 2014 by the social-democrat Matteo Renzi. The new government was composed of 50% female and male ministers each. The government strived for the creation of jobs as well as the streamlining of the bloated political and administrative system. The social protection systems also belonged to the comprehensive modernization program of the new government. Since December 2016, this program has been continued by Renzi`s party friend Paolo Gentiloni as prime minister. In March 2018, the next parliamentary elections will take place.

The performance profile of Italy

With regard to the private and public expenditures on research and development, Italy belongs to the lower midfield each. In terms of output in the form of the spread of internet use, Italy ranges in the last third of the 43 countries considered. This also applies to the capability to innovate as a whole. With its average prosperity, Italy places itself better, namely in the international average, among other things on account of tourism. The North of Italy is much more prosperous than the South. – In Italy, the last nuclear reactors were shut down in 1990 (see World Nuclear Association). From 2008, the government tried to revise these decisions, but these attempts ended with a negative referendum after the nuclear disaster in Japan in 2011. Italy, therefore, refrains from nuclear energy and belongs to the first third in terms of overall ecological burden. In the relief efforts, Italy has improved to place 7 of the countries considered. In the overall index of ecological sustainability, Italy thus attains place 8 among the 43 countries considered.

Italy is one of the top ten in social security spending, but spending is too much concentrated on pensions. Therefore, with its high poverty rate and its great income inequality, Italy is slightly worse off than the international average. With regard to overall educational expenditures, Italy ranges in the last third of the countries. As a result, Italy belongs to the last third in terms of total educational poverty. In the overall index of the equality of participation in terms of education and income as a whole, Italy then also ranges only in the last third. With regard to the objective capability of the population to autonomy as a whole, Italy also counts only to the last third. The satisfaction with the freedom of choice of the way of life is still somewhat worse, so that in the overall index of objective and subjective autonomy Italy is one of the last ten of the 43 countries considered.

Figure 6-1: The performance profile of Italy



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

With regard to the representation of women in parliament and to the proportion of female students, Italy ranks above the international average. But with its low female employment quotient and women's income quotient, Italy ranges among the last five each. In terms of women-friendliness, Italy, with its traditional gender roles, therefore belongs to the last third of the 43 countries considered. With regard to the openness for migrants, Italy has improved to the international average. In terms of the participation of the migrants in the education system and on the labour market, Italy is about in the international average too. This then also applies to the overall index of migrant-friendliness.

In terms of integration into the employment system, Italy belongs to the last third because of its traditional gender roles. This also applies to the labour market and to economic integration as a whole. Participation in politics and in trade unions is better developed; as to the integration in civil society, Italy counts to the first third. With regard to the overall index of social integration, Italy is therefore roughly in the international average.

Spain

Type and development trend

Through its membership in the EU and the Monetary Union, Spain has experienced an economic boom after 40 years of dictatorship. But real estate speculation has brought the Spanish banks in a crisis, which puts also pressure on the Spanish national budget. The status-conserving social security systems in Bismarckian tradition, but on a rudimentary level, are increasingly complemented by private services.

Since the 1986 law by the then socialist government, the health system has been developed in a more universalist way. The financing of the Spanish social welfare system is shifting from contributions to taxes.

Women in the family are given the responsibility for care work ("familistic"). At the same time, the financial benefits of the state are very low for families. In 2007, however, a social-democratic government implemented a gender equality law that promoted the modernization process in gender roles.

Overall, Spain is part of the familistic welfare regime, with the social services increasingly being supplemented by private services. In the financial and economic crisis, inequality in Spain has risen particularly strongly in international comparison.

Since November 2011, the conservative governments, under prime minister Mariano Rajoy, try to overcome the economic crisis with benefit cuts and tax increases. Thanks to tourism and the internationally improved conditions, Spain experienced an economic upturn in 2015 and 2016.

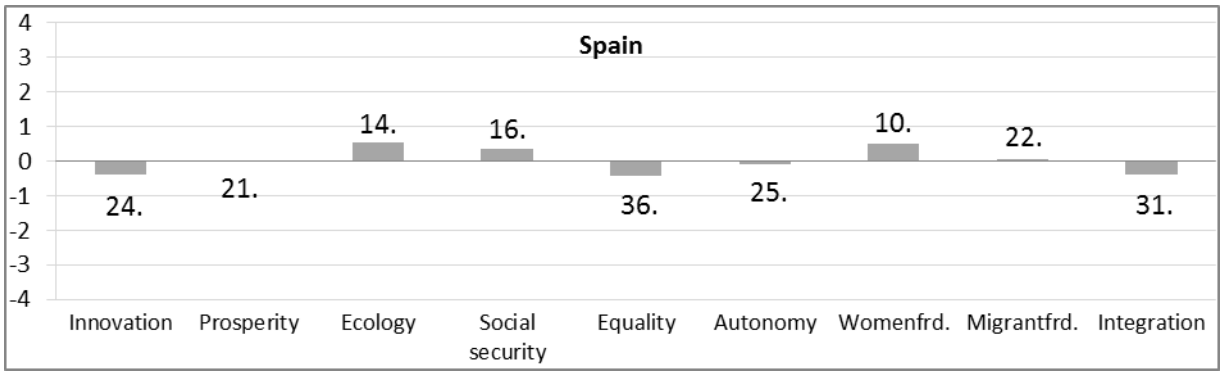
The performance profile of Spain

In view of private and public expenditures on research and development, Spain is roughly on the international average each. This also applies to the output in the form of the spread of internet use and the important patents. In the overall index of innovation, Spain is also on the international average. In terms of prosperity, Spain is then somewhat above the international average because of the tourism. In Spain, the first nuclear power station was put into operation in 1968, and in 2012 the conservative government allowed the continuation of the old nuclear power plants by at least 2030 by law. With its high exposure to nuclear technology, Spain ranges in the last third of the 43 countries considered. The environmental impacts of Spain are slightly lower than the international average, which is also lower than expected from prosperity. Spain is among the best third in its efforts to reduce the ecological burden. With regard to the overall index of ecological sustainability, Spain is then also among the first third of the 43 countries considered.

As to the expenditures of the welfare state, Spain belongs to the first third of the countries, but the social security systems are so ineffective that Spain, with its

great income inequality and its high income poverty rate as a whole, ranges in the last third of the countries considered. This also applies to the high proportion of early school leavers. With regard to the overall index of equality of participation in education and income, Spain also belongs to the last third of the 43 countries considered.

Figure 6-2: The performance profile of Spain



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

With regard to the share of total expenditures on education in GDP, Spain is slightly below the international average. In terms of the share of tertiary qualifications and the average reading competency according to PISA, Spain is roughly in the international average. This also applies to the objective capability of the population to autonomy as well as to the overall index of objective and subjective autonomy.

In the representation of women in parliament, Spain is among the top ten countries in the countries considered. In the employment quotient, Catholic Spain is only in the international average. With regard to the overall index of women-friendliness, Spain then belongs to the first third of the 43 countries considered. In terms of the openness for migrants, Spain is about in the international average; this also applies to the overall participation of the migrants in the education system and on the labour market. With regard to the overall index of migrant-friendliness, Spain is therefore also placed in the international average.

Spain belongs to the last five in terms of the integration into the labour market and in overall economic integration. In terms of integration in civil society, Spain is about in the international average. With regard to the overall index of social integration, Spain then ranges in the last third of the 43 countries considered.

Portugal

Type and development trend

After 40 years of dictatorship, Portugal began a process of democratization and modernization, which was supported by the EU membership from 1986 onwards. Despite an economic upturn with above-average growth rates, Portugal remained the poorest member of the EU until about 2011 (Greece fell behind Portugal).

The pension insurance and the unemployment insurance follow the contributory, status-conserving welfare logic. The rudimentary system of health care is universalistic.

Women's employment is, in particular because of economic necessity, the highest in the familistic countries of Southern Europe. Nevertheless, responsibility for care work remains the responsibility of women in the families. Overall, Portugal belongs to the countries with familistic welfare logic (see also Tavora 2012).

Under pressure from the dismantling of the high public debt, there is little scope for the expansion of the residual welfare state. In November 2015, however, a minority government of the Socialist Party under Prime Minister António Costa took over the government. With the communist leftist block and a green communist list, António Costa had previously negotiated a toleration, for which he had to implement a series of shared social improvements, including the raising of the minimum wage and an increase in pensions.

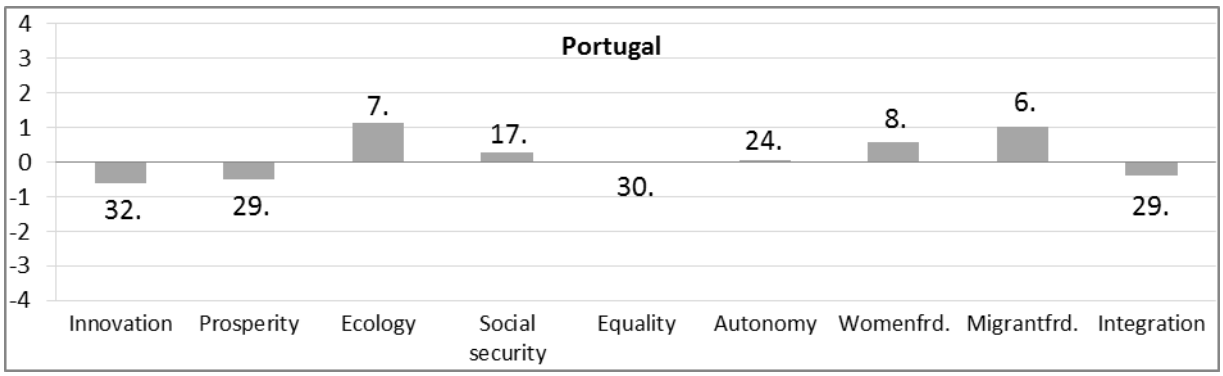
The performance profile of Portugal

With regard to public and private investments in research and development, Portugal is about in the international average. However, it is below average for the spread of internet use and in the last third in terms of the important patents. In the overall index of innovation capacity, Portugal is then also in the last third of the 43 countries considered. Portugal is the second-poorest country of the EU's old members (in standard of living, it has overtaken Greece in 2011) and it ranges in terms of average prosperity at the end of the midfield. As a downside to low prosperity, Portugal has a relatively small ecological burden. Portugal is one of the top ten with regard to energy efficiency as well as in renewable energies. And this also applies to the overall relief efforts. In the overall index of ecological sustainability, Portugal attains place 7 among the 43 countries considered.

Portugal is in the first third in terms of social spending, but the social security system is so ineffective that Portugal, with its high poverty risk and its great income inequality, ranges in the lower midfield. Portugal's share of total educational expenditures in GDP belongs to the lower midfield. This also applies to the high proportion of early school leavers. In the overall index of the

equality of participation in education and income, Portugal ranges at the beginning of the last third of the 43 countries considered. With regard to the average reading competency according to PISA and to the share of top readers, Portugal is about in the international average. In the overall index of objective and subjective autonomy, Portugal is also about in the average of the 43 countries considered.

Figure 6-3: The performance profile of Portugal



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

Portugal belongs to the first third with regard to the female representation in parliament, it is worse off in the proportion of female students, but it is among the top ten in the employment quotient and in the income quotient. In the overall index of women-friendliness, Portugal thus attains the place 8 among the 43 countries considered. – With regard to the openness for migrants, Portugal belongs to the first ten of the countries considered, in terms of the participation of the migrants in the education system and on the labour market as well. In the overall index of migrant-friendliness, Portugal thus attains place 6 among the 43 countries considered.

In terms of the integration into the labour market and in economic integration as a whole, Portugal belongs to the last third. With regard to the participation in civil society, it is in the lower midfield. In the overall index of social integration, Portugal then ranges at the end of the midfield of the 43 countries considered.

Greece

Type and development trend

After a military dictatorship, Greece has been a democracy again since 1974, which was consolidated by the membership in the European Community from 1981 onwards.

The social insurances are status-conserving on the basis of contributions and on a rudimentary level, whereby the administration is relatively intransparent.

The influence of the Greek Orthodox Church is high. The gender roles are very traditional. In terms of women's employment quotient, Greece belongs to the weakest of the 43 countries considered.

The state administration and the economy are very inefficient, i. a. because offices and positions are often politically allocated. In the hardness test of the financial crisis, it emerged in 2009 that the Greek state was much more indebted than in the previous official reports. According to the IMF, the main causes of the high deficit were the excessive increases in wages and, in particular in pensions in the Eurozone context. The tax administration is another problem. Many wealthy people can escape taxation.

Only with international financial assistance, Greece could be protected from state bankruptcy. Finally, in September 2017, the EU could close its excessive deficit procedure against Greece because of its improved financial situation.

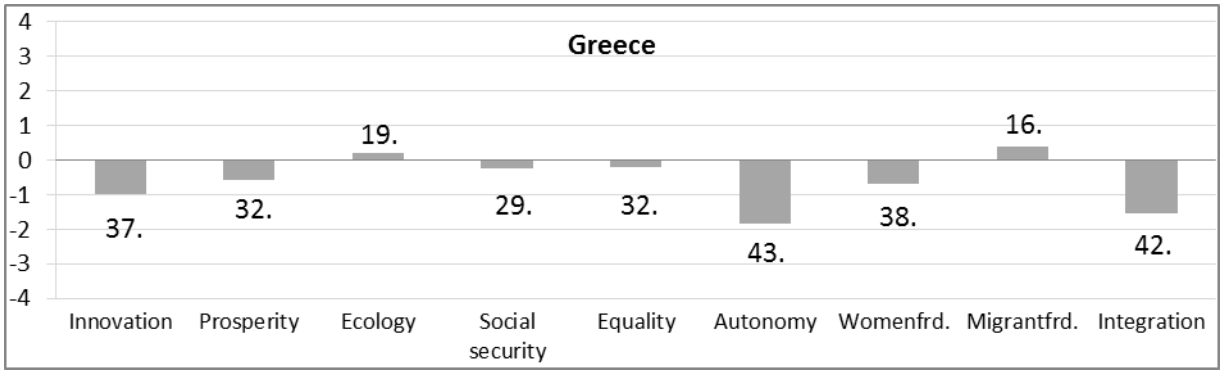
The performance profile of Greece

Greece ranges in the last third with regard to public and private spending on research and development, to the spread of internet use and to the most important patents. Accordingly, in the overall index of innovation capacity, Greece also belongs to the last third of the countries. I.a. because of the tourism sector, the average prosperity is somewhat better, but the average standard of living of Greece also counts to the last third of the 43 countries considered. Greece is the poorest country among the old members of the EU, after falling behind Portugal in 2011. – Greece renounces the risk of nuclear technology and is among the best third of the countries in terms of ecological burden. With regard to the relief efforts, Greece ranges in the lower midfield. In the overall index of ecological sustainability, Greece then ranks in the upper midfield of the 43 countries considered.

Greece belongs to the first third in terms of social expenditures, but the social security system is so ineffective, that the poverty rate of Greece ranges in the last third. In terms of total expenditures on education, Greece ranges in the last third. Accordingly, with its high proportion of risk-readers in the sense of PISA, Greece also counts to the last third. With regard to the equality of participation in education and income as a whole, Greece also belongs to the last third. Greece ranges in the last third in terms of the total educational expenditures, and accordingly, with its high proportion of risk-readers in the sense of PISA, Greece also belongs to the last third. With regard to the equality of participation in education and income as a whole, Greece ranges also in the last third. With its low total educational expenditures, Greece achieves only a sub-average share of tertiary degrees and belongs to the last third in terms of average reading competency as well as in the proportion of top readers according to PISA. With

regard to the objective ability of the population to autonomy as a whole, Greece also belongs to the last third of the 43 countries considered.

Figure 6-4: The performance profile of Greece



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

Due to the influence of the Orthodox Church, Greece has very traditional gender roles. With regard to the proportion of students as well as to the income quotient, Greece ranges among the last third and in terms of the employment quotient, it counts to the last ten. In the overall index of women-friendliness, Greece is thus one of the last ten of the 43 countries considered.

With regard to the openness for migrants, Greece ranks in the first third, because the new government has facilitated naturalization in 2015. In terms of the participation of the migrants in the education system and on the labour market, Greece belongs to the upper midfield. In the overall index of migrant-friendliness, Greece is therefore also in the upper midfield of the countries considered.

In terms of the integration into the employment system, Greece belongs to the last five because of the traditional gender roles; this also holds true for the integration into the labour market and for overall economic integration. In terms of the integration in civil society, Greece is among the last ten. In the overall index of social integration, Greece thus ranges on the penultimate place of the 43 countries considered.

Cyprus

Cyprus is a country that is still strongly influenced by its historical development. Due to its central position in the Mediterranean, the rule in Cyprus changed to the respective centuries until it was under the rule of the Ottoman Empire from the 16th century. Due to the weakening of the Turkish government in the 19th century, Turkey leased Cyprus to Great Britain, which annexed the island in World War I and made it a British colony in 1925. At the insistence of the Greek

and Turkish Cypriot people on independence (the Greek population also wanted to join Greece), treaties were signed between the United Kingdom, Greece and Turkey, with which the Republic of Cyprus was released into independence in August 1960. This was followed by repeated disputes between the Greek and Turkish Cypriots with regard to political decisions that led to bloody uprisings of both ethnic groups, which had to be ended by the United Nations.

In response to a Greek coup attempt in 1974, an invasion of Turkish troops followed. The result was a bipartition of Cyprus. Finally, in 1983, the northern part of Cyprus was declared an independent state under the name of the Turkish Republic of Northern Cyprus. Since then, one can speak of an island consisting of two states. Entry into the EU also led to difficulties, but the Republic of Cyprus (i.e. the Greek part) was admitted to the EU in 2004 following a referendum, led by UN Secretary-General Kofi Annan.

The following analysis refers to the Republic of Cyprus, i.e. the Greek part.

Type and development trend

As a former British colony, Cyprus became independent in 1960. After a failed Greek military coup in 1974, Turkey intervened, resulting in a division into a Greek southern part and a Turkish northern part. The Republic of Cyprus (i.e. the Greek part) joined the EU in 2004. Out of this complicated history some of the peculiarities of the institutions can be explained.

As in Greece, in the Republic of Cyprus social security is contributory and status-conserving. The care work is in the responsibility of the women in the families, the gender roles are still very traditional.

The education system has a late primary selection and a noteworthy proportion of private schools.

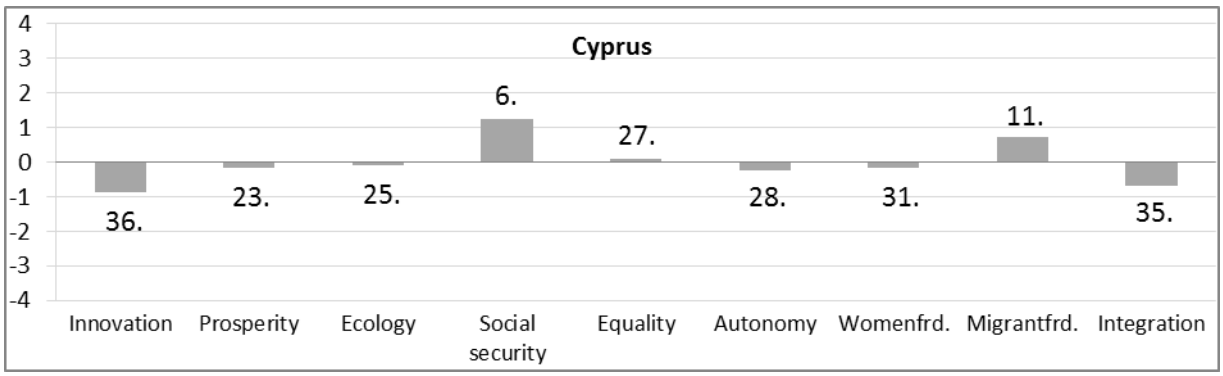
As of 2008, the presidential republic was led by a moderate communist president, who in December 2011 initially protected Cyprus from the requirements of the European Financial Stability Facility with a Russian loan. However, in June 2012, Cyprus had to apply for financial assistance from the EU and the IMF. In February 2013, the conservative candidate Nicos Anastasiades won the presidential election. In April 2013, the Euro group and IMF granted a 10 billion € loan linked to a comprehensive consolidation program. At the end of March 2016, Cyprus successfully completed the aid program.

Behind the unresolved national question, other political and social discussions – especially on the welfare system – have all too often to step back. Since Cyprus belongs to the economic crisis states of Southern Europe since 2011, no expansion of the welfare state is to be expected in the near future. The familistic welfare logic is likely to remain dominant.

The performance profile of Cyprus

With regard to both private and public spending on research and development, Cyprus belongs to the last ten of the countries considered. In terms of the spread of internet use, Cyprus ranges at the end of the midfield. In the overall index of innovation capacity, Cyprus counts to the last ten of the 43 countries considered. I.a. due to the business model of the "tax haven" and the tourism industry, Cyprus performs better in terms of standard of living, with Cyprus at about the international average. As backside of prosperity, the ecological burden of Cyprus is also about in the international average. With regard to the relief efforts, Cyprus is also about in the international average. This then also applies to the overall index of ecological sustainability.

Figure 6-5: The performance profile of Cyprus



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

The social expenditures of Cyprus amount to 22,3 % of GDP, putting Cyprus in 17th place among the 43 countries considered. In terms of income poverty risk, Cyprus then belongs to the first third. But i.a. because of the "citizenship for land ownership" program for rich applicants, especially from Russia and China, the high income inequality of Cyprus ranges in the last third of the countries. According to the proportion of risk-readers in the sense of PISA, Cyprus also counts to the last third. In the overall index of equality of participation in education and income, Cyprus also ranges in the last third of the 43 countries considered. In terms of total expenditures on education, Cyprus ranks second among the 43 countries considered. The proportion of tertiary degrees is in the first third of the countries but in the evaluation of the reading competency under PISA, Cyprus ranges only in the last third. With regard to the objective capability of the population to autonomy, Cyprus is still about in the international average. However, taking into account the low level of satisfaction of the population with the freedom of choice of the way of life, Cyprus ranges at the end of the midfield of the 43 countries considered in the overall index of objective and subjective autonomy.

The influence of the Orthodox Church supports the dissemination of traditional gender roles. Cyprus is among the last five with regard to the representation of women in parliament. As to the proportion of female students, Cyprus performs better, but in the women's employment quotient and in women's income quotient, Cyprus ranges in the lower midfield. In the overall index of women-friendliness, Cyprus belongs to the last third of the 43 countries considered. As to migrant-friendliness, Cyprus performs well, probably i.a. because there are many migrants from Greece. Cyprus is ranked 7th in terms of the admission of migrants; as to naturalizations, it is about in the international average. Cyprus belongs to the first ten in terms of the participation of the migrants both in the education system and on the labour market. This puts Cyprus in 11th place among the 43 countries considered in the overall index of migrant-friendliness.

With regard to the integration in civil society, Cyprus is above the international average. But in terms of both economic integration and integration into personal networks, Cyprus ranges among the last ten. Thus, Cyprus is also one of the last ten of the 43 countries considered in the overall index of social integration.

Malta

Type and development trend

Due to the influence of the Catholic Church, the model of the "male-breadwinner model" dominates in Malta. Care work is in the responsibility of the women in the families. In the representation of women in parliament, Malta is among the last ten of the 43 countries considered. Changes are most likely to be expected from the EU context. In terms of female employment, Malta is on the third-last place of the 43 countries considered.

As a former British colony, there is a proportion of private sponsorship in the school system, in addition to a share of Catholic-sponsored schools; these two types of schools are visited by ca. one third of the students. The focus of social protection in Malta is clearly on precautionary investment in education rather than on aftercare social expenditures.

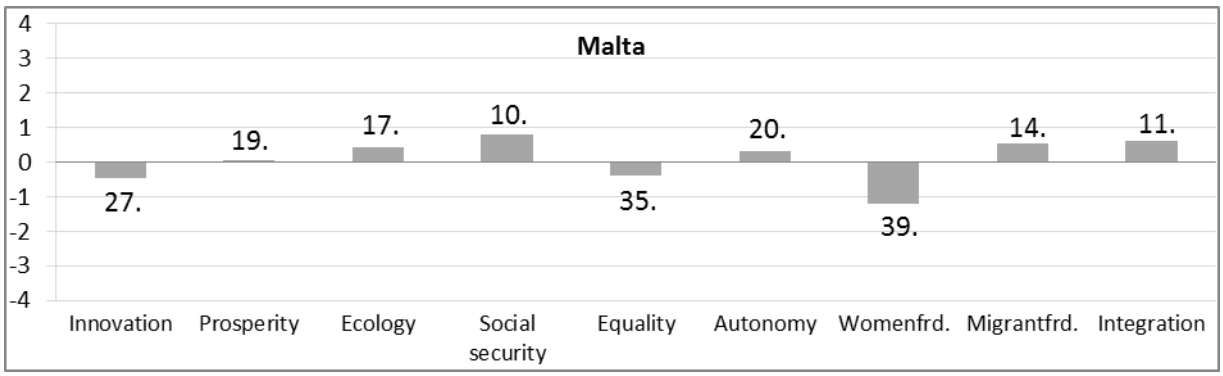
In summary, Catholic Malta tends to be a familistic society of the South, which, in continuity with British influence, also has some economically liberal components.

After the parliamentary elections in March 2013, the social-democratic Malta Labour Party under prime minister Joseph Muscat took over the government, with the priority to create new jobs. Following allegations of corruption against members of the government and his spouse, prime minister Joseph Muscat scheduled early parliamentary elections in June 2017, which he won with reference to high economic growth and low unemployment in Malta.

The performance profile of Malta

In view of the investments in research and development, Malta ranges in the last third; in the spread of internet use as output, it is in the lower midfield. In the overall innovation index, Malta then also ranges in the lower midfield of the 43 countries considered. In terms of average prosperity, Malta performs better, i.a. because of the tourism industry, and is slightly above the international average. With regard to the ecological burden, Malta belongs to the upper midfield; it renounces on nuclear technology and does not have that high CO_2-emissions. However, on the other hand, little renewable energy is used. But the energy is used efficiently. This places Malta in the upper midfield of the 43 countries considered in terms of the overall index of ecological sustainability.

Figure 6-6: The performance profile of Malta



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

With regard to the social expenditures of the welfare state, Malta is on place 30 among the 43 countries considered. Because of the strong unions, however, the income poverty risk and the income inequality are overall in the upper midfield. Malta's share of total education expenditures in GDP belongs to the top. But the educational opportunities are very unevenly distributed; there is a very high proportion of risk-readers in the sense of PISA. In the overall index of equality of participation in education and income Malta ranges among the last ten of the 43 countries considered. In terms of total expenditures on education, Malta ranks third among the 43 countries considered. But the educational opportunities are very unevenly distributed; there is a very high proportion of risk-readers in the sense of PISA. In the overall index of equality of participation in education and income, Malta then ranges among the last ten. In terms of overall reading competency according to PISA, Malta is at the beginning of the last third overall. In the objective capability of the population to autonomy, it lies at the end of the midfield. Taking into account the above-average satisfaction of the population with the freedom of choice of the way of life, Malta is about in the international average in the overall index of objective and subjective autonomy.

Due to the influence of the Catholic Church, Malta has very traditional gender roles. With regard to the representation of women in parliament, to the women's employment quotient and to the women's income quotient, Malta ranges among the last five each. In the overall index of women-friendliness, Malta thus also belongs to the last five of the 43 countries considered. With regard to both the admission of migrants and to naturalizations, Malta is about in the international average. In terms of the participation of the migrants in the education system, Malta is in the lead, and in the participation on the labour market in the first third. This puts Malta in 14th place among the 43 countries considered in the overall index of migrant-friendliness.

Because of its high economic growth, Malta has improved in terms of economic integration and is now above the international average. With regard to the integration into personal support networks and to the integration in civil society, Malta belongs to the first third each. In the overall index of social integration, Malta then ranks 11th among the 43 countries considered.

6.3 Performance of the familistic countries of Southern Europe

In the following, an attempt is made to attribute the performance of the familistic countries of Southern Europe (see table 6-1) partly to the welfare logic of the regime type, the guiding principles of the policies and the correspondingly designed institutions.

The familistic countries of Southern Europe are dominated by traditional guiding principles. Accordingly, the capacity for innovation and competitiveness is rather low. I. a. because of the tourism industry, the prosperity is slightly higher than would be expected according to the innovation capacity. As a backside of low wealth, the ecological burden is rather low, but also the relief efforts for environmental sustainability. The social security systems of the European South are rather residual, the family is given the task of caring, but at the same time families receive very little support from the state. The term "familistic" is therefore a euphemism; the very low birth rates are an indication of the excessive demands on women in the families, who are given many tasks without being supported. The weakness of the administrations also affects the aftercare security systems. Preventive education systems are also relatively weak, so that equal opportunities are rather low and poverty rates as well as income inequality are rather high. Due to the influence of the Catholic or Orthodox Church, gender roles are traditional and the women-friendliness is low. Because of traditional gender roles, integration into the employment system is rather weak. The integration into the labour market is also poor, where youth unemployment is disproportionately high due to the strong protection of the "insiders" and has to be partially absorbed by the families. The beautiful holiday countries of the European South could be socio-politically shaped much better.

In terms of innovation capacity, Spain and Malta are in the lower midfield, the remaining familistic countries range in the last third, Greece and Cyprus are even among the last ten of the 43 countries considered. In terms of wealth, Malta, Spain, Italy and Cyprus are about in the international average, with Portugal in the lower midfield and Greece in the last third. Because of tourism, prosperity is higher in all countries of Southern Europe than to be expected according to innovation capacity.

Table 6-1: Performance profiles of the familististic countries

Country	Inno-vation	Pro-sperity	Eco-logical sustain-ability	Social security	Equali-ty of partici-pation	Auto-nomy	Women friend-liness	Mig-rant-friend-liness	Social integra-tion
Greece	-0,97	-0,58	0,21	-0,25	-0,21	-1,84	-0,68	0,40	-1,56
	37	32	19	29	32	43	38	16	42
Italy	-0,60	-0,04	1,09	-0,03	-0,11	-1,21	-0,28	0,03	-0,16
	30	22	8	21	31	36	33	23	25
Malta	-0,47	0,05	0,42	0,79	-0,41	0,30	-1,21	0,53	0,60
	27	19	17	10	35	20	39	14	11
Portugal	-0,62	-0,49	1,12	0,27	-0,03	0,06	0,58	1,01	-0,38
	32	29	7	17	30	24	8	6	29
Spain	-0,41	-0,04	0,52	0,35	-0,42	-0,08	0,51	0,05	-0,39
	24	21	14	16	36	25	10	22	31
Cyprus	-0,87	-0,15	-0,10	1,26	0,08	-0,23	-0,18	0,72	-0,70
	36	23	25	6	27	28	31	11	35

Indicated are the z values (top line) and rank places (bottom line) of the countries for the examined performance criteria.

With the exception of Spain, all familistic countries of Southern Europe are renouncing nuclear technology as a risk technology. In terms of ecological burden level, all familistic countries are better than the international average or average, with Portugal having the lowest ecological burden (11th place). In terms of relief efforts, Malta and Cyprus spend far too little on renewable energies. But overall, relief efforts are better than the international average or about average for all familistic countries. Italy (with a relatively high share of

organic agriculture) and Portugal (with a strong use of renewable energies) are the best performers in terms of overall relief efforts (places 7 and 8). In the overall index of ecological sustainability, Cyprus is slightly below the international average, but the other countries of Southern Europe are all above the international average, with Portugal leading the way (7th place).

In the aftercare expenditures of the welfare state, Italy, Spain, Portugal and Greece belong to the first third, but the funds are disproportionately used for pensions. Italy and Greece are among the last ten in terms of preventive expenditures on educations, Spain and Portugal are in the lower midfield. Italy, Spain, Portugal and Greece have a clear focus on aftercare, with at least 16 ranking places better on welfare state aftercare than on investments in education. Malta and Cyprus are more likely to focus on financial services and on investments in education. In Malta and Cyprus, setting priorities in social protection is similar to economically liberal Anglo-Saxon countries.

However, social insurances are so ineffective, that Spain, Portugal, Greece and Cyprus rank I the lower midfield with regard to income inequality. In terms of income poverty, Spain and Greece belong to the last third. As to educational poverty, Italy, Spain, Cyprus and Malta range in the last third. In the index of equality of participation in education and income, five of the southern European countries are in the last third; Cyprus is in the lower midfield. With regard to the objective capability of the population to autonomy (especially through the education systems), all Southern European countries range in the lower midfield or in the last third of the 43 countries considered.

With regard to the representation of women in parliament, Spain and Portugal are in the first third, but Cyprus and Malta are among the last ten. In terms of women's employment quotient, Italy, Malta and Greece are among the last ten, while poor Portugal has a clearly higher female employment quotient. In the overall index of women-friendliness, Greece and Malta range among the last six of the 43 countries considered. Italy and Cyprus count to the last ten. Portugal and Spain, on the other hand, belong to the first third of the 43 countries considered in the overall index of women-friendliness.

In view of the openness for migrants, Portugal and Greece belong to the first third. With regard to the participation of the migrants in the education system and on the labour market, the countries of Southern Europe are all at least in the international average. In the overall index of migrant-friendliness Portugal reaches the good sixth place. Cyprus is a special case insofar as many of the migrants originate from Greece and the problems of integration are therefore less. As a result, Cyprus belongs to the first third with regard to migrant-friendliness. All countries of Southern Europe rank at least in the international average in the overall index of migrant-friendliness.

In terms of economic integration, Greece, Spain, Italy, Cyprus and Portugal are among the last ten of the 43 countries considered; only Malta with its low real

corporate taxation is above the international average. Participation in civil society is at least about in the international average in the southern European countries, with only Greece in the last third. With regard to the overall index of social integration, Malta is in the first third, Italy and Portugal in the lower midfield and Spain in the last third. Cyprus is among the last ten in terms of social integration and Greece is penultimate (followed only by India). In Southern Europe, Greece has the greatest integration problems after the global financial crisis and after the Euro crisis.

7. The differentiation of the post-socialist welfare regime of Eastern Europe

7.1 Commonalities and particularities of the post-socialist countries Länder

The greatest commonality of the Eastern European countries is that they were all state socialist societies before 1989/90. But even in this commonality, there are gradual differences.

The developments of the 1920s in the Soviet Union and after the Second World War in the other Eastern and Central European states in the direction of state socialism went hand in hand with the emergence of a welfare system that differed fundamentally from the systems of Western societies (see Zimmermann 2001). The state-socialist welfare regime aspired to guarantee material security and all-inclusive care for its citizens.

The state socialist welfare system was based on three main pillars: first, the implementation of a "right to work", mostly in connection with full employment; secondly, a wide-ranging state social security system with a variety of support programs and, finally, informal, state-directed economic measures (i.a. a very detailed price subsidy system). Basically, social benefits were not linked to citizenship but to the status of employment (mostly full employment) – in addition to the right to work, there was a duty to work, which was also anchored in the respective constitutions.

The right to work enshrined in the constitutions of the respective countries, combined with a – also fixed – "duty to work" formed the foundation of the state socialist welfare system and guaranteed a regular income. Open unemployment and the associated risks, e.g. the question of livelihood, did not matter. As a result of these peculiarities of the socialist system, there were significantly higher employment rates than in the Western industrialized countries and a widespread employment of women.

In connection with the employment of large parts of the population, the enterprises played a special role in the social security of their workers and employees. Apart from the general state functions such as free health care,

pensions, education and housing, they had further socio-political functions: in addition to the guaranteed job security already mentioned, the companies were responsible for occupational safety measures, for various wage replacement benefits, but also for the separate provision of housing and the entertainment of children's or recreational facilities (see Götting 1998, pp. 70 f.). Looking at the variety of these social benefits, another feature of the socialist welfare system becomes clear: most of the benefits were linked to employment status, and citizenship alone was not enough.

The price subsidy system served as another social policy instrument. The subsidization of everyday necessities (mainly staple foods, medicines, energy, housing, public transport) ensured that even low-income households could make a living. "Luxury goods", on the other hand, were heavily taxed and were thus unaffordable for many.

Götting (1998) contrasts the "state-paternalistic welfare regime" with the three regimes developed by Esping-Andersen (1990) and, like other authors (e.g. Ferge 1992), concludes that the pattern of social protection in Central and Eastern European countries can not be assigned to any of the three types of regimes. She therefore proposes that the welfare type of the Central and Eastern European States should be regarded as autonomous and that the Esping-Andersen typology should be extended to include this fourth type, which is characterized by (1) the incorporation of socio-political functions directly into the employment system, which leads to an almost complete suspension of the market mechanism; (2) the authoritarian restriction of social protection to the "working people"; (3) the universal claim of the state (see Götting 1998, p. 83).

Some similarities between the state socialist and social-democratic welfare regimes creep in: the values or ideals of work – solidarity, equality through redistribution – play an important role in both regimes. The dual-earner model serves as a model for gender roles, although the relatively low wages and the desire to increase living standards through double income were probably the main motivations for the employees. The high level of female employment, which is almost universally still evident in the Eastern European countries studied, can be attributed to these developments. Dominant in terms of social security was the (welfare) state, the extent of social benefits was, if one was employed, comprehensive. In the financing of benefits, however, was not only resorting to the welfare state, but also on paid contributions to social security, so that one finds here also some features of the occupational ideal type. Need and contributions entitled to the use of benefits.

Similarities to the familistic ideal type can be found in the state coordination of the economy and the care work by the families (but not by the church, with Catholic Poland being an exception).

The political and social changes since 1985 in the USSR and since 1989 also in the other states covered not only the economy but also the existing socio-

political structures. The adaptation of the institutions to new tasks and requirements was unavoidable; the first priority was the change of the legal and economic conditions, not the transformation of the social system. It was assumed that the new economic system could adopt a functioning social security system (see Wagener 2001, p. 7).

However, the basic problems after the collapse were that the existing system was confronted with new, previously unknown risks such as unemployment and poverty, and that a reorientation of social protection aimed at supporting the needy had to take place. It was necessary to adapt financing, organization and management to the new conditions. The main points of reform were – also a commonality – (1) the introduction of unemployment insurance, (2) the reform of the existing pension system, (3) the provision of support for families, (4) the establishment of a subsistence level and (5) the restructuring of the health service (see Götting 1993, p. 2).

In the following, we will try to subdivide the group of post-socialist countries of Eastern Europe according to the dominant welfare logics into subgroups and to highlight the particuliarities of the respective group of countries.

Slovenia

In the course of developments in recent years, Slovenia moved more in the direction of a universalist welfare regime. The country's development was marked by the maintenance of social cohesion and by reforms, initiated and implemented in consensus among the major political forces and in tripartite coordination. The generous welfare system is essentially regulated by the state, and all have equal access to welfare state benefits. In this combination, Slovenia is alone in the post-socialist group of countries, but the current banking crisis has also put Slovenia under pressure.

Czech Republic, Slovakia, Hungary, Poland

The welfare systems in these countries tend to be more in the direction of economic liberalism, but in some areas social-democratic and corporatist elements in the welfare logic can also be observed. Although the benefits of the welfare state have been markedly reduced compared to socialist times, the level of social support is very extensive compared to "pure" economically liberal welfare systems. Much of the social benefits are financed through taxes. Measured against the economic indicators, these countries are more likely to be associated with an economically liberal "camp". Hallmarks of this group of countries are frequently changing governments belonging to different political camps. As a result of this, and also because of the lack of a common strategy, it is also difficult in social policy to detect a uniform direction of development.

Compared to the more economically liberal Baltic states, the countries of the Visegrád Group (Czech Republic, Slovakia, Hungary, Poland) offer their inhabitants more social protection and a better developed welfare system.

Estonia, Latvia, Lithuania

The Baltic states tend more clearly than the Visegrád group towards economic liberalism. At the same time, however, these countries are examples of the juxtaposition of elements in the social security system, which can be assigned to different welfare logics in their design.

Looking at the direction of economic policy, this is clearly a liberal direction. The liberal market structures are accompanied by a reduced welfare state, but in comparison with e.g. the United States or Great Britain, in some areas nearly social-democratic traits can be observed. This is mainly due to the adoption of welfare state institutions from the socialist past, but also due to the orientation towards the social-democratic Scandinavian neighbours.

Bulgaria, Romania

Bulgaria and Romania have a lower level of economic development, measured in terms of GDP per capita, than the other EU members from Central and Eastern Europe. Related conditions are also the main reason why Bulgaria and Romania are latecomers to EU membership. The late reforms in these two countries received stronger support from EU accession.

Croatia, Serbia

Croatia and Serbia have been strongly set back by post-Yugoslav succession wars in socio-economic development. Croatia's EU membership since July 2013 supports the economic and social catching-up process. Serbia is also supported by the EU in the socio-economic development process, since 2007 through pre-accession assistance and since January 2014 in the context of EU accession negotiations.

Russia

Russia, outside of the three types of Esping-Andersen, is more associated with a state capitalist welfare type – a mix of capitalist economic order and remnants of a socialist welfare system, but the latter is becoming more and more rudimentary. All of this is still in transition – but it is to be expected that the welfare system will be more in the current direction. Characteristics of this state capitalist regime type are a rather liberal economic policy, but at the same time the state tries to maintain or strengthen its dominant role.

In the following, the countries, which were just only presented as overviews, are described in detail.

7.2 Case studies on the individual countries

Slovenia

Type and development trend

Since independence was established in 1991, the Republic of Slovenia has developed its own path of development, making it today one of the most successful post-socialist countries in the European Union (see Buchen 2007, p. 65 ff.).

The welfare state still largely rests on the common development path of Yugoslavia with the corresponding basic principles. Thus, the social system is financed from contributions and is therefore income-dependent. At the same time, there are many types of benefits, which are equally secured, as well as the concept of universalist basic services, which are accessible to all. In recent years, the subsidiarity principle has been increasingly emphasized with reforms in various areas of social protection in order to relieve the state budget after the world financial and banking crisis. Hence, the family plays an important role in the general protection (Kolarič /Kopač /Rakar 2008, p. 569 ff.).

Women are formally equated, but there is still a patriarchal division of roles in Slovenian society, whereby the tasks of household and education are attributed to the women.

Although Slovenia is open to the EU, the political focus is on domestic policy. Employees and employers have central co-operation opportunities. In the European harmonization process, Slovenia is able to keep up with the EU average in many areas, or even surpass it, such as low income inequality and poverty.

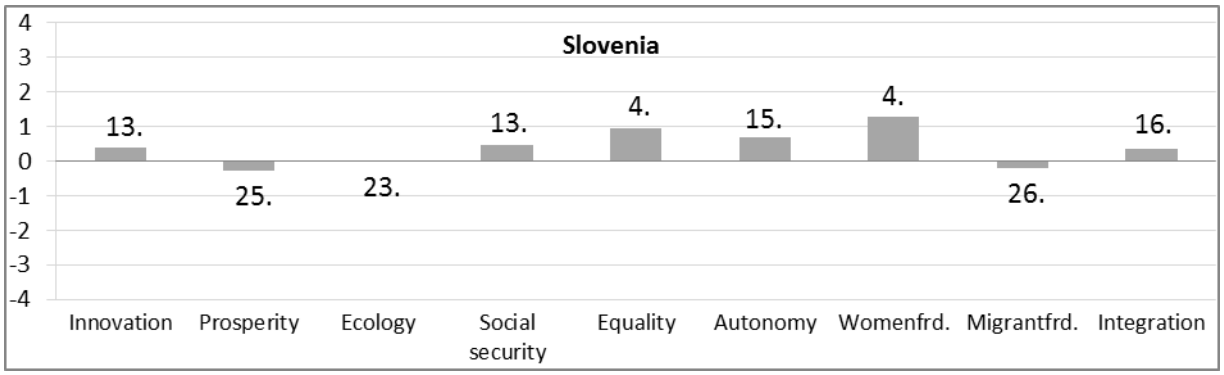
However, the bank's indebtedness led to a rising public debt in the global financial crisis, which the center-right government (since January 2012) sought to reduce with savings programs. In response to the two economic crises savings have been made in pensions and families. Because of these unpopular savings programs, the government moved to middle-left in March 2013 and to a new center-left government under the professor of law Miro Cerar after the elections in July 2014. As the first country in Europe, the Cerar government anchored the right to drinking water in the constitution, which the state now needs to ensure.

The performance profile of Slovenia

In terms of public and private expenditures on research and development, Slovenia ranks overall in the first third, while in the output of these investments, for example in the form of patents, it ranges only in the lower midfield. In the overall index of innovation capacity, Slovenia then belongs to the first third of the 43 countries considered. As a result of the banking crisis, the average prosperity of Slovenia is currently only about in the international average. The

ecological burden ranges in the lower midfield, mainly due to the focus on nuclear technology. In terms of relief efforts, Slovenia still belongs to the first third, i.a. because of the high share of regenerative energy. With regard to the overall index of ecological sustainability, Slovenia then is in the international average.

Figure 7-1: The performance profile of Slovenia



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

With regard to the social expenditures of the welfare system in the event of risk, Slovenia is in the first third of the 43 countries considered, achieving that the small poverty rate is in the first third and the low income inequality even on second place among the 43 countries considered, a hint to the relatively solidary character of the remuneration structure. As to the entire educational expenditures, Slovenia also belongs to the first third, thus achieving a very small proportion of early school leavers and a small proportion of risk-readers in the sense of PISA. With regard to the equality of participation in terms of education and income as a whole, Slovenia is in fourth place of the 43 countries considered. The evaluations of the PISA studies show that the Slovenian education system has improved. In average reading competency, Slovenia now belongs to the first third. In terms of the objective capability of the population to autonomy, Slovenia is then in the upper midfield. The subjective assessment of the freedom of choice of the way of life by the population ranks in the first third. With regard to the overall index of autonomy, Slovenia also belongs to the first third.

Slovenia is predominantly Catholic. In the case of the representation of women in the parliament and in the employment quotient, however, it belongs nevertheless to the top ten each. In the proportion of female students and in women's income coefficient, Slovenia is even among the top five. With regard to the overall index of women-friendliness, Slovenia also belongs to the top five of the 43 countries considered. In terms of openness for migrants, Slovenia ranges in the lower midfield, immigrant participation in the education system and on the labour market are altogether in the international average. In the overall index of migrant-friendliness, Slovenia is thus in the lower midfield. – In January

2017, however, Slovenia has significantly tightened its right of asylum, asylum seekers can be sent back at the border immediately.

In view of the integration into the employment system and into the labour market, Slovenia is overall about in the international average. As to the integration in civil society, Slovenia ranges in the lower midfield. With regard to the personal support networks, on the micro-level of social integration, Slovenia performs best from all 43 countries considered. Slovenia thus ranks in the upper midfield in the overall index of social integration.

Czech Republic

Type and development trend

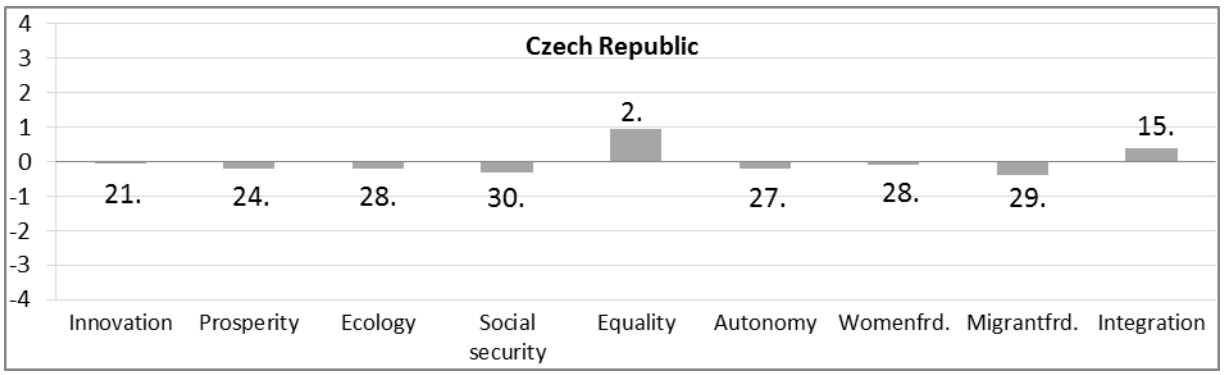
In the welfare logic, the Czech Republic attaches to the conservative Bismarckian tradition of the pre-war phase. In family policy, e.g. one finds even today conservative elements. The Czech Republic is to be settled between the social-democratic model and the economically liberal model. As a communist legacy, it has taken on the expectations of many people to a functioning social state, which is reflected in the protection of workers' rights and a strong role of trade unions. Since the change in system, representatives of economic liberalism have been pursuing a course towards a more open market, more privatization and the breaking up of the old monopoly of the state. Their efforts have led to a development towards "European capitalism", particularly in the context of the accession to the European Union. Overall, efforts are being made to build a bridge between (efficient) welfare state and economic liberalization. There is a slight tendency from the universalist heritage to the economically liberal welfare logic.

The performance profile of the Czech Republic

The Czech Republic, Slovakia, Hungary and Poland come less close to a universalist welfare regime than Slovenia.

The Czech Republic is in the upper midfield as to private and public investments in research and development, with the results in form of the dissemination of internet use and the important patents altogether in the international average. In the overall index of innovation capacity, the Czech Republic therefore belongs to the upper midfield of the 43 countries considered. On this basis, prosperity is roughly in the international average. In the case of ecological burden, the Czech Republic is performing poorly in the lower midfield, particularly due to the strong use of nuclear technology and the high CO_2 emissions. As a result of the increased share of renewable energies, the Czech Republic is slightly better in the relief efforts and ranks in the upper midfield. However, with regard to the overall index of ecological sustainability, the Czech Republic ranges in the lower midfield.

Figure 7-2: The performance profile of the Czech Republic



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

With regard to social welfare expenditure, the Czech Republic is about in the international average. The solidarity of the Czech Republic is demonstrated by the fact that it is one of the best five in terms of income inequality and is at the top of all 43 countries considered with its low rate of relative poverty. With regard to the share of total education expenditures on GDP, the Czech Republic ranks 32th among the 43 countries considered, so the Czech Republic is placing its priority less on precaution than in aftercare. In terms of educational poverty, the Czech Republic is in the upper midfield. In the overall index of the equality of participation with regard to education and income, the Czech Republic ranks second (behind Norway and before Finland and Slovenia). In terms of total investments in the education system, the Czech Republic belongs to the last third of the 43 countries considered. The Czech Republic places its priority on prevention rather aftercare. In the evaluation of the education systems by the PISA studies, the average reading competence and the share of top readers are roughly in the international average.

In the representation of women in parliament and in the income quotient, the Czech Republic is in the lower midfield. At the employment quotient, the Czech Republic is slightly worse off. As a country with a Catholic tradition, the Czech Republic shows relatively traditional gender roles and ranges in the lower midfield of the 43 countries considered with regard to the overall index of women-friendliness. In terms of openness for migrants, the Czech Republic belongs to the last third. However, with the participation of the (few) migrants in the education system and on the labour market, the Czech Republic is in the upper midfield each. In the overall index of migrant-friendliness, the Czech Republic then ranges at the end of the midfield.

The Czech Republic has improved with regard to its integration into the employment system and into the labour market and is now among the top ten in terms of economic integration. When it comes to integration in civil society, the Czech Republic is below the international average and with regard to the integration into personal networks above the international average. The Czech

Republic is thus at the end of the first third in the overall index of social integration.

Slovakia

Type and development trend

A double transformation process was initiated in Slovakia in the early 1990s. In 1989, the USSR largely lost its political and economic influence on the then Czechoslovakia, and a new orientation towards the European Community was set in motion. In 1993 – with the division of the country into the Czech Republic and the Slovak Republic – further problems such as mass unemployment and rising long-term unemployment rates arise, which result, among other things, from the unequal distribution of industry in former Czechoslovakia. These processes result in a reconstruction of the welfare state from a universalist model to a residual one, which above all promotes the reduction of public spending, thus reducing the financial burden of the state.

The inclusion in the EU is not only to be seen in the context of the common development and harmonization efforts, but there are criticisms from various sides that social policy has been subordinated to the economic objectives. Slovakia is already considered to be in the market economy. It has moved away from a regime of the collective-egalitarian type. A lack of state-owned services must be complemented by private networks, with the citizens' own responsibility being strengthened.

The inclusion in the EU is not only to be seen in the context of the common development and harmonization efforts, but there are criticisms from various sides that social policy has been subordinated to the economic objectives. Slovakia has moved away from a regime of the collective-egalitarian type. A lack of state-owned services must be complemented by private networks, with the citizens' own responsibility being strengthened.

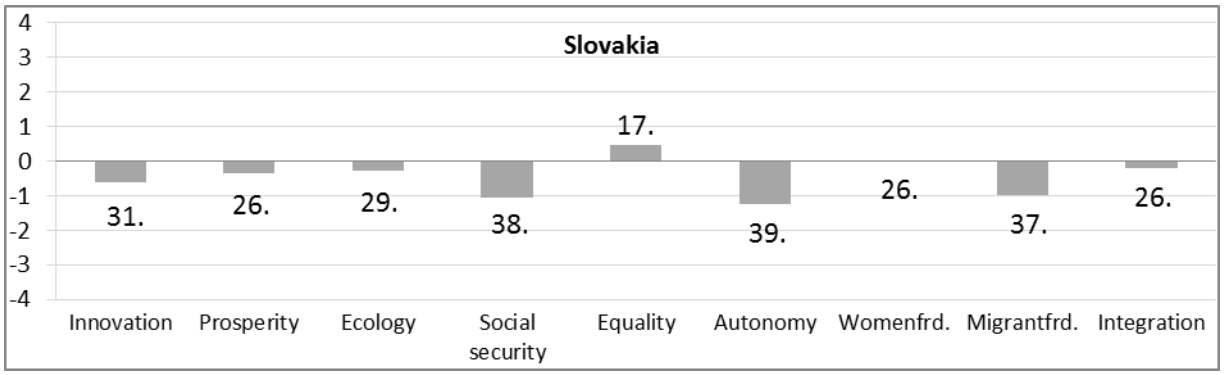
The performance profile of Slovakia

In view of public and private research and development spending, Slovakia altogether belongs to the first third. As to the output in the form of the spread of internet use and the important patents, Slovakia ranges overall in the lower midfield. With regard to the overall index of innovation capacity, Slovakia ranges in the last third of the 43 countries considered. Because of foreign direct investment on the basis of a low taxation of the enterprises, the average prosperity is somewhat better, namely in the lower midfield.

With regard to social spending, Slovakia is on place 31 of the 43 countries considered. Nevertheless, the income policy achieves that income inequality is low and the poverty rate small. Slovakia is also in the last third in terms of the total expenditure on education, but manages to release as few as possible into

the knowledge society without graduation. However, the stricter evaluations of the PISA studies reveal the weaknesses of the Slovakian education system: the proportion of the risk-readers and the educational poverty in total also count to the last third. Corresponding to the low spending on education, the average reading competence according to PISA and the proportion of top readers also belong to the last third of the 43 countries considered. The low percentage of tertiary graduates is also among the last third. With regard to the overall index of autonomy, Slovakia belongs to the last ten of the 43 countries considered. The Slovakian education system is too one-sided: almost all of them have a school leaving certificate, but the average level of competence according to PISA ranges in the last third of the 43 countries considered.

Figure 7-3: The performance profile of Slovakia



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

The gender roles are still traditional. In the income quotient, Slovakia ranges in the lower midfield. In the proportion of female students, it is better off, in the representation of women in parliament and in the employment rate worse (in each case last third of the countries). With regard to the overall index of women-friendliness, Slovakia then belongs to the lower midfield of the 43 countries considered. In terms of openness for migrants, Slovakia ranges in the last third. With regard to the participation of the (few) migrants in the education system and on the labour market, Slovakia is altogether in the lower midfield. In the overall index of migrant-friendliness, Slovakia thus ranges in the last third of the 43 countries considered. – In the current refugee debate, the left-populist Robert Fico acts particularly restrictive.

In terms of economic integration as well as in the integration in civil society, Slovakia belongs to the last third. On the other side, Slovakia is in the first third as to the integration into personal networks. In the overall index of social integration, Slovakia then ranges in the lower midfield of the 43 countries considered.

Hungary

Type and development trend

Tausz (2007) notes that, according to the typology of the welfare regime of Esping-Andersen, in Hungary there is a hybrid form between economically liberal, conservative and social-democratic regime (see Tausz 2007, p. 329; Ferge-Eotvos 2006, p.616). The various measures and arrangements presented here reflect the ideologies and interests of different governments. And these are the main reason for Hungary's hybrid character.

Hungary is characterized by a frequent change in the direction, in which the welfare system developed, which is mainly due to the changes of the majorities between the different parties. In summary, it can be said that "[...] the conservative right-wing forces have weakened the bases of the newly won freedoms and democratic institutions" (Ferge /Tausz 2002, p.198).

The elections in April 2010 brought the right-wing Orbán government to power, which was confirmed in the elections in April 2014. The considerable public debt does not offer much room for an expansion of the welfare state in the near future. The welfare logic is now mostly conservative with some economically liberal elements such as the high private share of health expenditures.

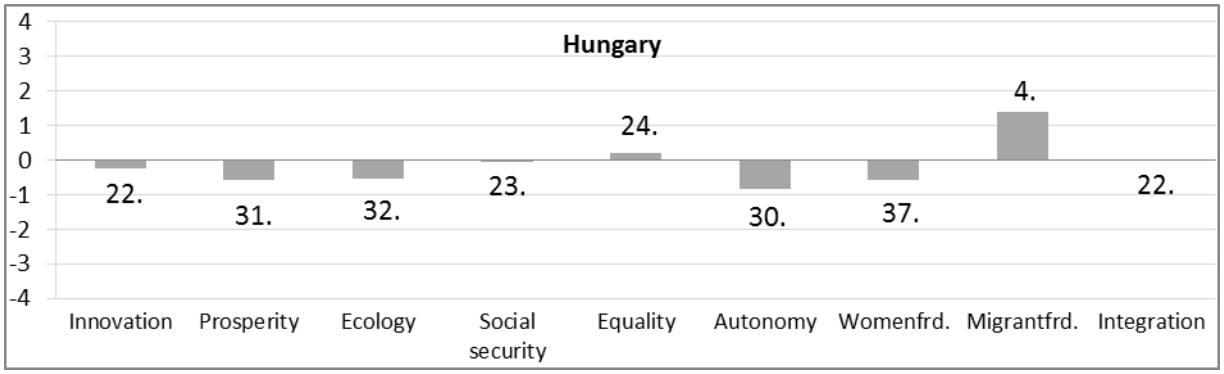
The performance profile of Hungary

Hungary's investment in research and development as a share of GDP has overall improved to the international average. The output of these investments, in the form of the spread of internet use and the important patents, is slightly below the international average. In the overall index of innovation capacity, Hungary has thus improved from the last third to the international average. The average prosperity is at the beginning of the last third, and is expected to improve according to the current growth rates. In terms of ecological burden, Hungary counts to the lower midfield, because it places too much emphasis on nuclear technology. In relief efforts, Hungary ranges in the last third, because it uses little renewable energy. With regard to the overall index of ecological sustainability, Hungary thus belongs to the last third of the 43 countries considered.

In terms of social expenditures of the welfare system, Hungary is placed in the upper midfield, and Hungary thus achieves a low income inequality and a small poverty rate, which belong to the first third each. In terms of income, Hungary is an egalitarian society. As to educational opportunities, the situation is much worse. The total educational expenditures of Hungary range only in the lower midfield of the countries considered. Hungary ranges in the last third with its high share of risk-readers in the sense of PISA. In the overall index of the equality of participation in education and income, Hungary is thus about in the international average. The entire educational expenditures of Hungary range only in the lower midfield. With regard to the share of risk-readers in the sense

of PISA, Hungary belongs to the last third. In the overall index of the equality of participation in education and income, Hungary is thus about in the international average. According to the low educational expenditures, in the share of tertiary degrees, in the average reading competency in the sense of PISA and in the share of top readers, Hungary belongs to the last third each. This then also applies to the overall objective capability of the population to autonomy. In the subjective assessment of the freedom of choice of the way of life by the population, Hungary also belongs to the last third of the 43 countries considered.

Figure 7-4: The performance profile of Hungary



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

It will be the catholic influence, that the gender roles in Hungary are still relatively traditional. In terms of share of women in parliament, Hungary is third to last of the countries. Hungary ranges in the last third as to the employment quotient. With regard to the overall index of women-friendliness, Hungary then ranges among the last ten of the 43 countries considered. As to the share of migrants, Hungary ranges in the last third. The information base from the international surveys is too small for statements on migrant-friendliness. – In the current refugee debate, prime minister Viktor Orbán acts particularly restrictive.

With regard to economic integration, Hungary has improved from the last third of the 43 countries to the international average because of the improved labour market. Hungary belongs to the first third with regard to the personal networks. In terms of integration in civil society, Hungary ranges in the last third. In the overall index of social integration, Hungary is then in the average of the 43 countries considered.

Poland

Type and development trend

The focus in supporting the needy population is placed in Poland on financial support instead of social services. The support of the poor as well as of the

unemployed is inadequate and there is a lack of long-term successful approaches to resolving urgent problems as well as an efficient active labour market policy. The financial support provided is on a rudimentary level due to the tight budget. Poverty especially affects young women (up to 40 years). One reason for the low budget for welfare benefits are the low tax revenues. Too low a share of the population pays taxes at all. Exempt from taxation are, for example, well-organized and influential interest groups such as farmers or miners (see Siemienska /Domaradzka 2007, p. 522 f).

Within the framework of the reforms of the welfare state since the turn of 1989/90, citizens' own responsibility has become more important and redistribution elements have been reduced. Proximity to economic liberalism can be seen in the introduction of a capital funded pillar in the pension insurance system, the sole financing of workers' health contributions and the residual financial benefits in the event of unemployment. Similarly, the share of private institutions in tertiary education is relatively high. The Polish social system is a mixture of a status-preserving contributory insurance system and economically liberal elements.

The most important providers of welfare services are the central government as well as the regional and local administrative units. Private providers are only active in the areas of child care and care for the elderly, and since pension reform, they are also active in the field of old-age insurance. The churches in Poland have traditionally taken an important role for helping the poor and the homeless (see Siemienska /Domaradzka 2007, p. 506 f.).

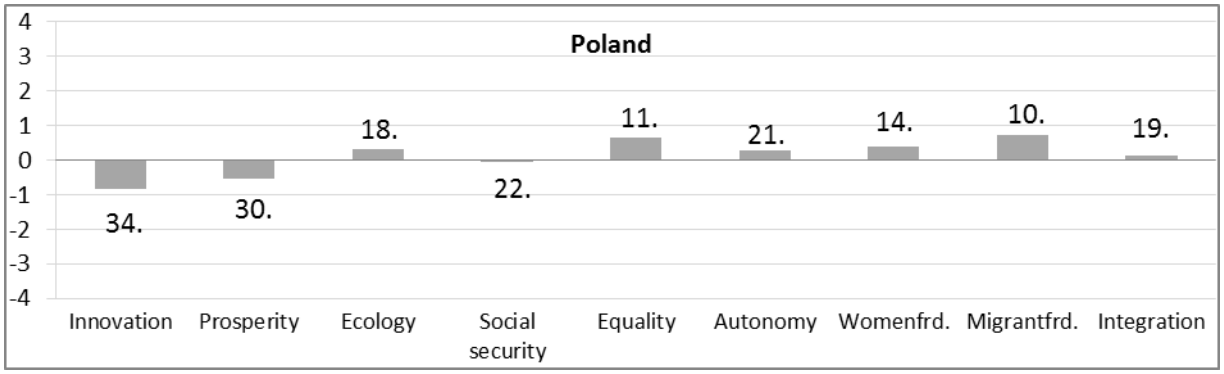
Since the elections in 2007 and October 2011, a conservative-liberal coalition, headed by Donald Tusk and since September 2014 by Prime Minister Ewa Kopacz, because Tusk changed to the head of the European Council, governed. Since the parliamentary elections in October 2015, the national conservative Party of Law and Justice (PiS) rules with absolute majority, at first under prime minister Beata Szydło. In December 2017, Szydło was replaced by the former minister of economy and finance, Mateusz Morawiecki, as the new prime minister, who intends to strengthen Poland's economy by investing strongly in technology and innovation.

The performance profile of Poland

Poland belongs to the last third with regard to private and public investments in research and development. In terms of output in the form of the dissemination of internet use and of the important patents, it also ranges overall in the last third. As to the overall index of innovation capacity, Poland is also in the last third of the countries considered. Accordingly, Poland also belongs to the last third of the 43 countries considered with regard to average prosperity. Parallel to the relatively low prosperity, the ecological burden of Poland is also relatively low (place 10), because it i.a. abstains from the nuclear technology. In the relief efforts Poland ranks in the lower midfield. With regard to the overall index of

ecological sustainability, Poland therefore belongs to the upper midfield of the 43 countries considered.

Figure 7-5: The performance profile of Poland



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

In the aftercare expenditures of the welfare state for the event of risk, Poland is about in the international average. This also applies to the resulting income inequality and the poverty rate. The performance of the education system is a strong point of Poland. With the low proportion of early school leavers as well as with the low proportion of risk-readers in the sense of PISA, Poland belongs to the top ten. In terms of the equality of participation in terms of education and income as a whole, Poland thus ranks 11th among the 43 countries considered. Poland's average reading competency according to PISA ranks in the first third and its share of top readers in the upper midfield. However, the share of tertiary qualifications is below the international average. With regard to objective autonomy as well as to the overall index of objective and subjective autonomy, Poland ranks in the average of the 43 countries considered.

Due to its Catholic character, Poland has more traditional gender roles. At the same time, Poland is increasingly investing in education, which should lead to a modernization. Poland is at the end of the midfield at the employment quotient. In the representation of women in parliament and in the income quotient, Poland ranks in the upper midfield. In the student share, Poland finished well with 5th place. With regard to the overall index of women-friendliness, Poland is thus in the first third of the 43 countries considered. With regard to the share of migrants, Poland belongs to the last ten, while it performs well in the naturalization of the (few) migrants (over 40 % of the migrants come from Ukraine). In the case of the participation of the (few) migrants in the labour market, Poland is in the international average. Although Poland participated in the PISA evaluations, there is no information on the difference between migrants and other pupils. – In the current refugee crisis, the new national conservative government acts particularly restrictively.

With regard to the integration into the employment system and into the labour market, Poland ranges altogether in the lower midfield. When it comes to integration in civil society, it belongs to the last third. But with regard to the integration into personal networks, Poland performs well, which is why Poland ranks in the upper midfield of the 43 countries considered in the overall index of social integration.

All in all, the Czech Republic, Slovakia, Hungary and Poland have characteristics that can be explained by the combination of the conservative Bismarck social insurance tradition, the universalist socialist phase, and economically liberal reforms.

Estonia

Type and development trend

The Estonian welfare system after the reconstruction according to the Western model is shaped by various influences and exhibits both economically liberal as well as post-socialist elements.

The economically liberal policy of the right-wing parties since 1992 has resulted in Estonia in a trend towards a minimal state, in which there is strong confidence in market mechanisms and little emphasis is placed on active social policy. This is clearly shown by the low proportion of unemployed people covered by the unemployment insurance scheme, insufficient unemployment benefits and the low financial resources provided for an active labour market policy (see Saar/Lindemann 2008, pp. 151 ff.). In addition, pension payments are comparatively low. On the other hand, from the old system of comprehensive social security during the Soviet Union's time remained on the one hand the attitudes of the citizens towards the state task of securing the livelihood and equality of the population. And secondly, some elements have been preserved in the current system. These include the high social insurance contributions of the employers and the childcare system, which is well developed compared to other countries. Other factors influencing the system include the proximity to the Scandinavian welfare states as well as the requirements of the European Union and other supranational organizations (see Trumm/Ainsaar 2007, pp. 187 f.).

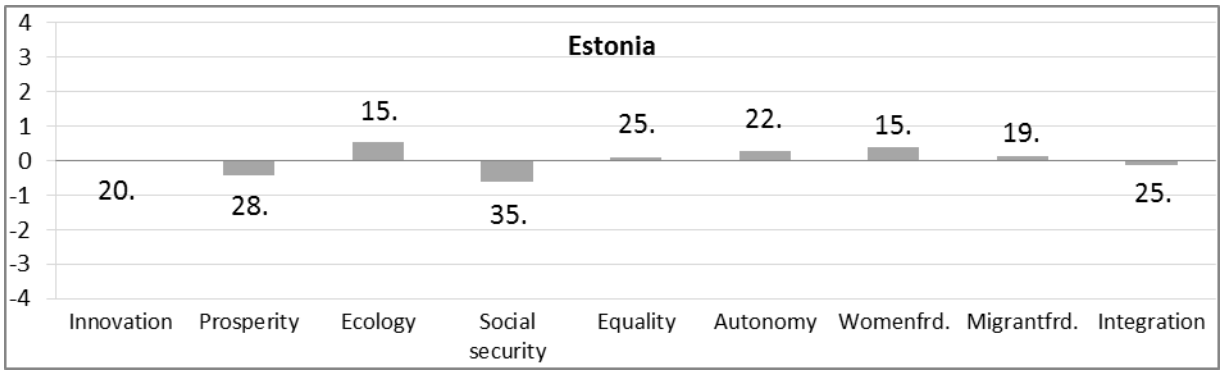
Considering the low level of coverage and of benefits together with the increasing importance of privately organized services, the reforms in Estonia have so far led to a development of the former state socialist system of social protection towards the economically liberal welfare logic.

The performance profile of Estonia

The Baltic states of Estonia, Latvia and Lithuania have so far followed a development towards an economically liberal welfare logic.

Altogether, Estonia's investments in research and development are slightly above the international average; the overall output in the form of the spread of internet use and important patents is at around the international average. In terms of the overall index of innovative capacity, Estonia also places itself at about the international average. In terms of average living standard, Estonia ranges only at the end of the midfield as a result of the real socialist heritage, but it is on the rise. As a back side of the relatively low prosperity, Estonia is in the upper midfield with regard to the ecological burden. In terms of relief efforts, Estonia is even among the top ten. This puts Estonia at the end of the first third of the 43 countries considered in the overall index of ecological sustainability.

Figure 7-6: The performance profile of Estonia



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

In total, spending by the welfare state is at 16,3 % of GDP (in 2014 according to OECD 2016), putting Estonia on place 34 among the 43 countries considered. In terms of the welfare state's aftercare expenditures for the risk case, Estonia thus belongs to the last third of the 43 countries considered, corresponding to the economically liberal welfare logic. In line with the economically liberal logic, it is more heavily invested in total education spending. In terms of total expenditures on education, Estonia ranks 29th among the 43 countries considered. As a result, the proportion of risk-readers as defined by PISA is very low. In the overall index of equality of participation in education and income, Estonia is thus at about the international average. With its investments in education, Estonia achieves a high proportion of tertiary graduates and, according to the reading competency in the PISA evaluations, overall a place in the first third. With regard to the objective capability of the population to autonomy, Estonia belongs then also to the first third of the 43 countries considered. Taking into account the below-average satisfaction of the population with the freedom of choice of the way of life, Estonia is in the international average in the overall index of objective and subjective autonomy.

With regard to the representation of women in parliament, Estonia is in the international average. However, when it comes to women's employment quotient and women's income quotient, Estonia is at the beginning of the midfield each. In the overall index of women-friendliness, Estonia also places itself at the beginning of the midfield of the 43 countries considered. With regard to the admission of migrants, Estonia belongs to the first third. But in naturalization Estonia ranges only at the end of the midfield. When it comes to the participation of the migrants in the education system and on the labour market, it is at the beginning of the midfield each. However, the specific problem of Estonia is in the Russian-speaking minority, which comprises about 25 % of the population. In 2014, 7 % of citizens were naturalized ethnic Russians, 8 % were still stateless and 9 % had a Russian passport (see Foreign Office). The policy towards ethnic Russians is so far too restrictive. This could change with the new government.

In terms of the integration into the employment system and into the labour market, Estonia belongs to the first third each. In terms of integration in civil society, however, it ranges in the last third. This puts Estonia in the overall index of social integration at about the average of the 43 countries considered.

Latvia

Type and development trend

The introduction of a new social security system at the beginning of Latvia's independence was necessary for a number of reasons. On the one hand, the welfare system was to adapt to the new market-oriented economic system and, on the other hand, due to Latvia's decline in economic efficiency in the context of transformation processes, it was necessary to secure certain population groups. In addition, economically liberal principles dominated political decisions at this time, which is why market solutions and a greater importance of private providers were politically desired. Latvian workers' weakly organized employee interest representation was not enough to counter balance. The pension scheme was developed without public debate, with advice from the World Bank from representatives of the Ministry of Welfare and experts from Sweden (see Rajevska 2007, p. 435).

The full conversion of the social protection system can be judged to be successful in terms of its goals. The pension system also appears to be financially sustainable in the long term, the share of the black economy has fallen and participation in tax payments has increased. However, despite its long-term, more equitable design, in the transitional period pension reform is a burden on older generations. For example, the proportion of pensioners, whose pension is below the subsistence level, is at 80 % (see Rajevska 2007, 439 f.).

As part of its preparations for accession to the European Union, Latvia committed to fighting poverty and social exclusion. The area of social work has gained in attention and the staffing has increased. Although in the capital Riga around half of the services are provided by municipal institutions, cooperation with non-governmental organizations, which provide at least 44% of services, and private institutions is very good (see Rajevska 2007, p. 435 ff.). The unequal distribution of income is very high in Latvia. Relatively many people are affected by poverty or at risk of poverty. The proportion of people, who are considered poor despite work, is above average. Meanwhile, poverty is seen as a structural problem in Latvian society and the prevailing injustice in the country is blamed for it (see Rajevska 2007, p. 437 ff.).

In addition to global contributory social security, the Latvian social security system also consists of tax-financed elements. The healthcare system is largely funded by taxes and basically has a universal claim, but it does not reach this because of high private co-payments. The pay-as-you-go system of pension insurance was supplemented by an economically liberal capital-financed element to make a stronger emphasis on individual personal responsibility. Although the contributory unemployment insurance is constructed according to the Bismarckian model, its status-conserving character is lacking because of the low level and of the short duration of the financial benefits (see Baum-Ceisig et al. 2008, p. 193).

In the pension system, the focus shall be shifted from the first pay-as-you-go pillar to the second capital-funded pillar in the coming years, which will further advance privatization in this area. Also in other areas of social welfare, such as health and housing, the private sector will become more important in the provision, financing and performance control in the coming years. The economically liberal welfare logic is therefore overall gaining in importance in Latvia.

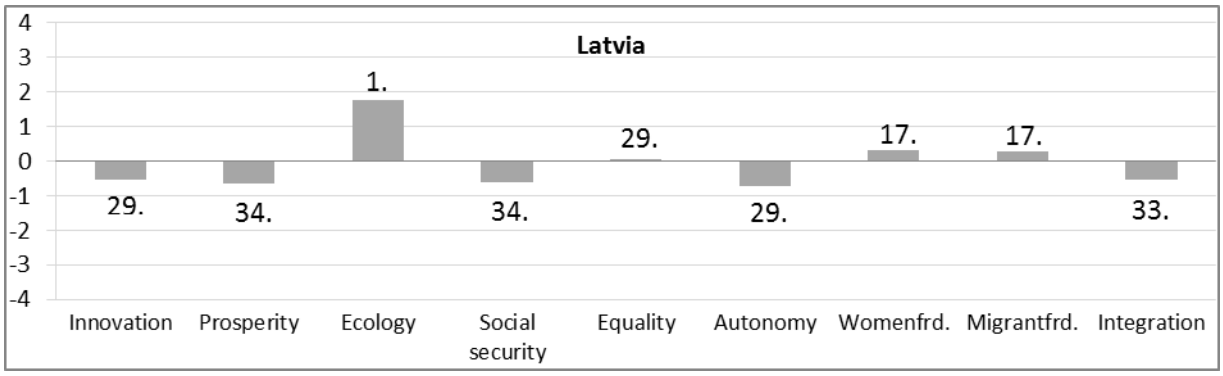
The performance profile of Latvia

With regard to the private and public investments in research and development, Latvia ranges overall among the last ten. The output in the form of the spread of internet use is in the lower midfield. This puts Latvia at the end of the midfield in the overall index of innovation capacity. In terms of average prosperity, Latvia belongs to the last third of the 43 countries considered, but after the deep slump in the crisis year 2009, Latvia is again on a good growth course. The ecological burden of Latvia is very low. Also in the relief efforts, it belongs to the top, because it i.a. relies heavily on renewable energy. That's why Latvia even holds the top position in the overall index of ecological sustainability among all 43 countries considered.

According to the economically liberal course, Latvia ranges in the last third in terms of the welfare state's aftercare expenditures for the risk case. This also applies to the resulting high income inequality. In terms of overall education

expenditures, Latvia ranks in the international average. With regard to the share of risk-readers in the sense of PISA and to the share of early school leavers altogether, Latvia is also in the international average. In the overall index of equality of participation in education and income, Latvia thus ranges at the end of the midfield. In the objective capability of the population to autonomy, Latvia belongs to the lower midfield. Taking into account the low level of satisfaction of the population with the freedom of choice of the way of life, Latvia ranges at the end of the midfield of the 43 countries considered in the overall index of objective and subjective autonomy.

Figure 7-7: The performance profile of Latvia



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

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In parliament, women in Latvia are not well represented. But in terms of the proportion of female students, in women's employment quotient and in women's income quotient, Latvia is above the international average each. This puts Latvia in the upper midfield in the overall index of women-friendliness. With regard to the admission of migrants, Latvia is in the upper midfield, but as to naturalizations only in the last third. Because the participation of the migrants in the education system and on the labour market belongs overall to the first third, Latvia is in the upper midfield in the overall index of migrant-friendliness. However, the specific problem of Latvia is the ethnically Russian minority, which comprises about 25 % of the population. Only about half of this Russian minority has adopted Latvian citizenship, the others have as "non-citizens" e.g. no suffrage (see Foreign Office 2017). This as yet unresolved division is a weak point of Latvian society.

In terms of economic integration, Latvia is about in the international average. But Latvia ranges in the last third with respect to both integration into personal support networks and integration in civil society. In the overall index of social integration, Latvia also belongs to the last third of the 43 countries considered.

Lithuania

Type and development trend

The participation of women in gainful employment is well developed in Lithuania in the socialist tradition. Women are also well represented in the tertiary education sector.

One problem in Lithuania is that many young people move abroad because of low wages, about half of them to the UK.

In the political landscape so far dominated center-right governments, from 2012 to 2016, however, there was in the meantime a social-democratic coalition government.

The economic system can undoubtedly be characterized as liberal, but the social security system is essentially guaranteed by the state in the socialist tradition, despite the reforms carried out. At the same time, some areas (such as the healthcare system) are increasingly subject to individual responsibility. Overall, the economically liberal welfare logic in Lithuania has gained importance.

The performance profile of Lithuania

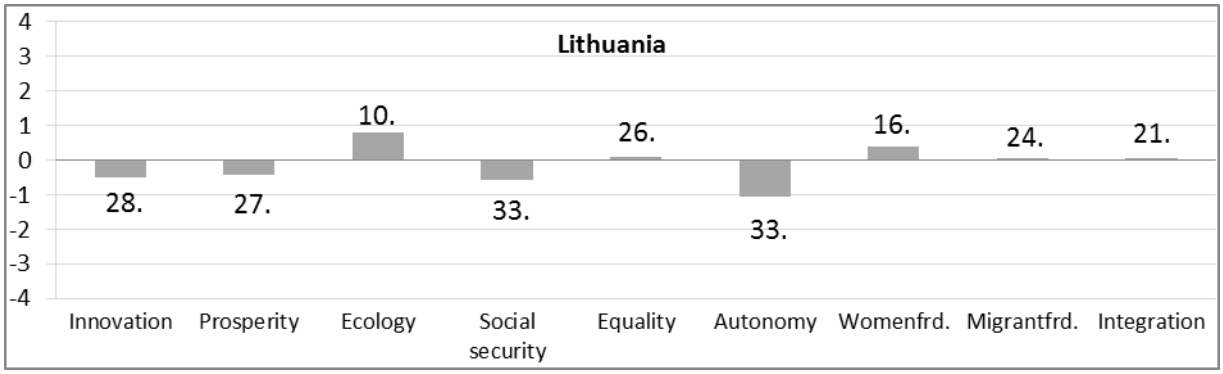
In view of private and public investments in research and development as well as in the output of these investments in the form of the spread of internet use, Lithuania ranges at the bottom of the midfield each. This then also applies to the overall index of innovation capacitiy. In terms of average prosperity, Lithuania performs accordingly and ranges in the lower midfield. As a backside of its low average prosperity, Lithuania, with its low ecological burden, is among the top ten of the countries considered. It dispenses e.g. on nuclear power and has relatively low CO_2-emissions. The relief efforts also belong still to the first third. In the overall index of ecological sustainability, Lithuania thus attaines place 10 among the 43 countries considered.

In total, spending by the social state amounts to 15,3 % of GDP (in 2013 according to Eurostat 2016), putting Lithuania on place 36 among the 43 countries considered. With regard to total expenditures on education, Lithuania is on place 25 among the 43 countries considered. The proportion of risk-readers in the sense of PISA ranges at the end of the midfield. In the overall index of equality of participation in education and income, Lithuania thus counts to the lower midfield. As to the average reading competency according to PISA and the share of top readers, Lithuania ranges at the beginning of the last third each. Taking into account the very low satisfaction of the population with the freedom of choice of the way of life, Lithuania belongs to the last third of the 43 countries considered in the overall index of objective and subjective autonomy.

Although Lithuania ranks only in the international average with regard to the representation of women in parliament, its share of female students and its

female income quotient is in the upper midfield each. In the overall index of women-friendliness, Lithuania then also belongs to the upper midfield.

Figure 7-8: The performance profile of Lithuania



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

With regard to the admission of migrants, Lithuania ranges in the last third, as to naturalizations at the end of the midfield. But in the participation of the (relatively few) migrants in the education system and on the labour market, Lithuania belongs to the first ten each. In the overall index of migrant-friendliness, Lithuania is still about in the international average. The specific problem of the Baltic states is the Russian-speaking minority. While Latvia has 25-29 % ethnic Russians and Estonia 23-25 %, in Lithuania there are only 6-9 %. The citizenship policy of the three Baltic countries reflects the scale of the problems: Latvia has introduced restrictive admission tests and, consequently, almost half of the ethnic Russians are stateless. Estonia has somewhat eased such tests and therefore has a slightly lower proportion of stateless persons among the ethnic Russians. Lithuania, on the other hand, with its lower proportion of ethnic Russians, passed a law on citizenship on November 3, 1989, which regulates a right to citizenship. Accordingly, there is no significant proportion of stateless persons among the ethnic Russians. The Lithuanian society has thus already largely overcome this challenge.

In terms of economic integration, Lithuania has improved to the international average. As to the integration in civil society, Lithuania belongs to the last third of the countries considered, but with regard to the integration into personal support networks to the first third. In the overall index of social integration, Lithuania is thus about in the international average.

In the following, the post-socialist countries **Bulgaria** and **Romania**, **Croatia** and **Serbia** as well as **Russia** shall be analysed. Russia tends towards a state-capitalist regime type, while Bulgaria and Romania as well as Croatia and Serbia are laggards in EU membership and are supported by the EU in their socio-economic catching-up process.

Bulgaria

Type and development trend

As part of EU accession, there was a change in Bulgarian social policy. From the passive policy it moved away in favour of an active. The focus is now on tackling the causes of unemployment and poverty instead of providing financial resources in the event of a life-threatening situation. In addition, the socio-political institutions should help the needy people to find their way back to an independent life (see Groot /Pavlova 2006, p. 82). In the opinion of Groot and Pavlova, the fight against poverty and social exclusion will continue to be a central topic of social policy in Bulgaria in the future. However, long-term poverty alleviation strategies must also be accompanied by an increase in social security benefits and, in particular, by a viable reform of pension insurance, if the number of poor pensioners is to be reduced. In order to reduce poverty, Bulgaria, the poorest country in the EU, also needs financial support from the EU.

The welfare system of the "latecomer" Bulgaria, influenced by the post-socialist past, still has universalistic elements, which are, however, increasingly supplemented by economically liberal elements. This trend is e.g. visible in health care, where the private share of funding has strongly increased. The introduction of income-related insurance contributions and benefits gives Bulgaria's welfare system also a status-conserving character. The conservative elements are associated with low-level benefits, unlike the familistic regime in pensions too.

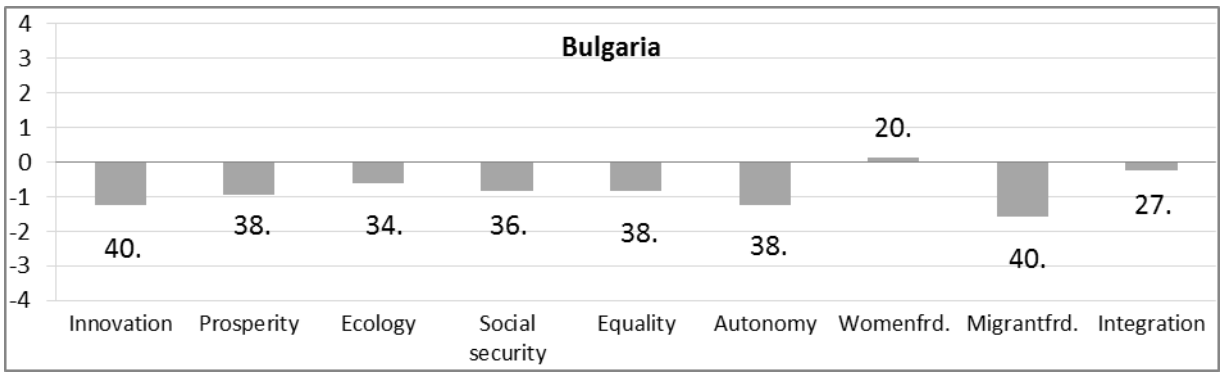
The performance profile of Bulgaria

Bulgaria ranges among the last ten of the 43 countries considered, both in the investments in research and development and in the output in the form of the spread of internet use. This then also applies to the overall index of innovation capacity. As a result, average prosperity is on place 38 and lowest in the EU (Romania is slightly ahead on place 36 among the 43 countries considered). The ecological burden in Bulgaria is higher than expected according to the low level of prosperity. Bulgaria relies e.g. too strong on the risk technology of nuclear power. In terms of relief efforts, it belongs to the last ten, especially because of the very low energy efficiency. This puts Bulgaria among the last ten of the 43 countries considered in the overall index of ecologica sustainability.

As to the welfare state's aftercare in the case of risk, Bulgaria belongs to the last third. This also applies to the resulting great income inequality and to the high income poverty risk. In terms of overall educational spending for provision, Bulgaria counts to the last ten. On this basis, Bulgaria, with its high proportion of risk readers in the sense of PISA, is also among the last ten. In the overall index of equality of participation in education and income, Bulgaria then also belongs to the last ten. Based on its low overall educational expenditures,

Bulgaria is among the last ten in the average reading competency according to PISA. Both in terms of the objective capability of the population to autonomy and in the subjective assessment of the freedom of choice of the way of life by the population, Bulgaria ranges among the last ten of the 43 countries considered. In the development of prosperity and social security, Bulgaria is a laggard in the EU.

Figure 7-9: The performance profile of Bulgaria



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

With regard to the representation of women in parliament and to the proportion of female students, Bulgaria is slightly below the international average each, while the employment quotient and the income quotient are above the international average. In the overall index of women-friendliness, Bulgaria is then about in the international average. With regard to the admission of migrants, Bulgaria ranges among the last five of the countries, as to naturalizations about in the international average. In the participation of the migrants in the education system, Bulgaria counts to the last ten. In the overall index of migrant-friendliness, Bulgaria ranges on the third to last place of the 43 countries considered.

In view of the integration into the employment system and into the labour market, Bulgaria belongs overall to the lower midfield. As to the integration in the civil society, it ranges in the lower midfield too. In the overall index of social integration, Bulgaria then also belongs to the lower midfield.

Romania

Type and development trend

In Romania, it is difficult to assign its institutions to one of the well-known welfare types. After overcoming the crisis triggered by the collapse of the Eastern Bloc and its institutions as well as subsequent disorientation in the early

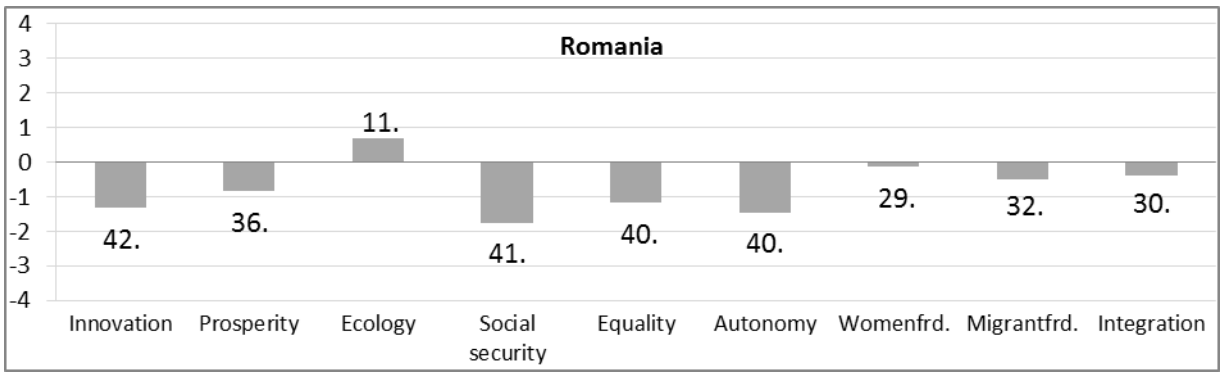
1990s, the country has found a new reference model in the European Union and its welfare institutions. Initial steps towards social protection for the population have already been taken in the context of EU accession, but the financial resources are at such low levels, that they are not comparable with Northern and Western European countries.

Romania is still institutionally characterized as a post-socialist welfare state. There are also elements of the familistic welfare logic recognizable, in that social security would not be possible without family support. In contrast to the familistic welfare regime, in Romania also spending on pensions is below the international average. The social security systems, and in particular also the investments in education as provision, are only rudimentarily developed in Romania.

The performance profile of Romania

Romania ranges second to last as to the private investments in research and development and on the last place as to the public investments. With regard to the output of these investments in the form of the spread of internet use and of important patents, it belongs to the last ten each. In the overall index of innovation capacity, Bulgaria ranges second to last among the 43 countries considered. In particular because of its abundance of raw materials, Romania scores slightly better in terms of average prosperity, namely on place 36. According to the low prosperity, the environmental burden of Romania is rather low, but it relies too heavily on the risk technology of nuclear power. Romania's relief efforts are in the international average. In the overall index of ecological sustainability, Romania thus still belongs to the first third.

Figure 7-10: The performance profile of Romania



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

In view of the welfare state's aftercare expenditures for the risk case, Romania is among the last ten. Romania ranges at the very end in terms of the overall educational expenditures. With its high proportion of risk readers in the sense

PISA, Romania is among the last ten. In the overall index of the equality of participation in education and income, Romania ranges on the fourth to last place, followed only by Turkey, Brazil and South Africa. Because of the very low educational expenditures, the average reading competency according to PISA and the share of the top readers are on the 37th and 38th places of the 43 countries considered. In terms of its objective capability to autonomy, Romania then ranges third to last, followed only by India and China.

With regard to the representation of women in parliament, Romania ranges among the last ten, but as to the proportion of female students and to the income-quotient, it is above the international average each. In the overall index of women-friendliness, Romania then ranges at the end of the midfield. With regard to the admission of migrants, Romania is on the fourth to last place, followed only by India, Brazil and China. More precise statements can only be made on this problem area, if more reliable information is available than until now.

In terms of economic integration and of integration in civil society, Romania ranges in the lower midfield each. As to the integration into personal support networks, Romania belongs to the last third of the 43 countries considered. This then also applies to the overall index of social integration.

Croatia

Type and development trend

The social security systems of Croatia have historically been developed in Bismarckian tradition and then transformed into the Communist phase according to the Soviet model.

According to Bartlett (2007), Croatia belongs to the group of early reformers in the Western Balkans. Privatization began immediately after the fall of the Berlin Wall, mainly by government-close managers.

After the turn of 1989/90, reforms of the pension system and of the health care system were based on the three-pillar model of the World Bank, whereby private providers gained increasing importance.

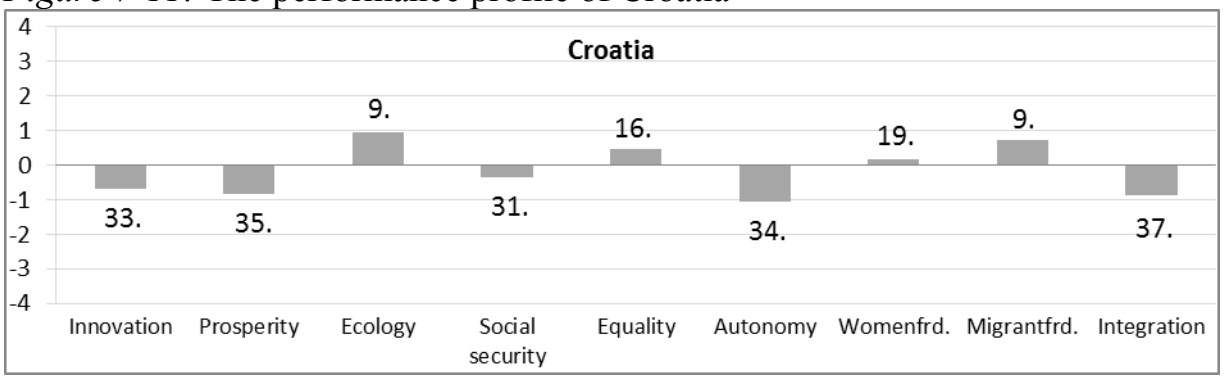
On the basis of low prosperity and the burden of treating the consequences of war, Croatia is one of the laggards in the EU in socioeconomic development. Also the welfare system of Croatia is therefore not adequately equipped.

The performance profile of Croatia

With regard to the investments in research and development, Croatia belongs to the last third. This also applies to the output of these investments in the form of the spread of internet use. In the overall index of innovation capacity, Croatia ranges also in the last third. Croatia's average prosperity is at the beginning of

the last ten. As downside of low prosperity, the ecological burden of Croatia is also low, here Croatia is among the top ten. With regard to regenerative energies and relief efforts as a whole, Croatia has improved and belongs now to the first third. In the overall index of ecological sustainability, Croatia is then one of the top ten countries in the 43 countries considered.

Figure 7-11: The performance profile of Croatia



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

In terms of the social expenditures of the welfare state, Croatia ranks roughly in the international average, and this holds also with regard to the equality of participation in income. In Croatia, there is the smallest proportion of early school-leavers, but in the internationally better-comparable share of risk-readers, Croatia is only in the international average. Croatia is among the top ten in terms of equality of participation in education. In the overall index of the equality of participation in education and income, Croatia ranks thus at the beginning of the midfield of the 43 countries considered. With regard to the share of total education expenditures in GDP, Croatia belongs to the last ten of the 43 countries considered. In terms of the average reading competency according to PISA and the share of top readers, Croatia ranges in the lower midfield. The share of tertiary qualifications and the objective capability of the population to autonomy as a whole belong to the last third. In the subjective assessment of the freedom of choice of the way of life by the population, Croatia is the fifth to last, and with regard to the overall index of objective and subjective autonomy, Croatia is the tenth to last.

With regard to the representation of women in parliament and in the employment quotient, Croatia is below the average of the countries considered. In terms of the share of female students and in the income quotient, Croatia is clearly better than the average. In the overall index of women-friendliness, Croatia thus ranks slightly above the average of the 43 countries considered. In the share of migrants, Croatia is among the first third, with regard to the participation of the migrants in the education system and on the labour market overall as well.

Croatia is among the top ten in the overall index of migrant-friendliness. Citizenship is, however, ethno-national.

Croatia is among the top ten in terms of economic integration. In terms of integration in civil society, Croatia is about in the average of the countries considered. When it comes to integration into personal networks, Croatia ranges in the last third. In the overall index of social integration, Croatia is among the last ten of the 43 countries considered.

Serbia

Type and development trend

The welfare logic of Serbia is characterized by its different development phases. The first law on social insurance was introduced in 1922 in the context of the Kingdom of Serbs, Croats and Slovenes in the Bismarckian tradition. In the socialist phase, the companies assumed a central role for social security, but they gave it back after the turn of 1989/90.

According to Bartlett (2007), Serbia belonged to the group of late reformers in the Western Balkans, who had the lowest share of private-sector activities. The informal sector is large and in the formal sector the insiders of the labour market are strongly protected. The health and education system is underfunded due to the problems of public budgets.

Because of the serious war damages, there are many problems to be dealt with, but little financial resources. Since 2007, Serbia has already been supported by the EU with pre-accession aid. Since January 2014, Serbia is conducting negotiations with the EU. EU support should help to improve the under-funded social security systems of Serbia, which is a socio-economic latecomer compared to the old members of the EU.

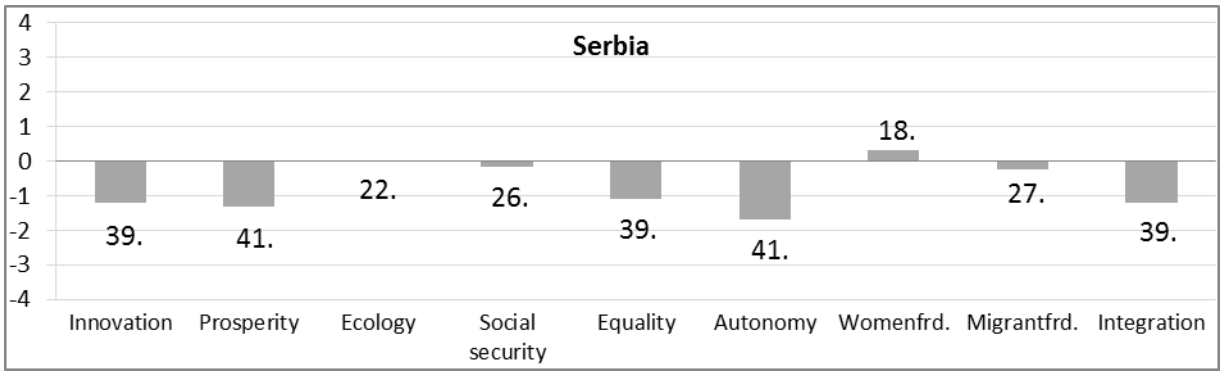
The performance profile of Serbia

Serbia is one of the last five in terms of private investments in research and development as well as in the output of these investments in the form of the spread of internet use. This then also applies to the overall index of innovation capacity. With regard to average prosperity, Serbia is third to last of the 43 countries considered (only followed by China and India). As downside of the very low prosperity, the ecological burden of Serbia is also low. But in the relief efforts it ranges among the last ten. With regard to the overall index of ecological sustainability, Serbia is thus about in the international average.

Serbia is in the upper midfield in terms of social spending. However, income inequality has risen sharply and now ranges among the last ten, which also applies to the high income poverty risk. With regard to the entire educational expenditures as precaution, Serbia belongs to the last third, with the high share

of risk-readers in the sense of PISA likewise. In the overall index of equality of participation in education and income, Serbia ranges among the last five of the 43 countries considered. Corresponding to the low educational expenditures, Serbia belongs to the last ten of the countries in terms of tertiary education as well as in terms of the average reading competency according to PISA and in the share of top readers. With regard to the objective capability for autonomy, Serbia is sixth to last of the countries. Taking into account the very low satisfaction of the population with the freedom of choice of the way of life, Serbia is third to last among the 43 countries considered with regard to the total overall index of objective and subjective autonomy, followed only by Turkey and Greece.

Figure 7-7: The performance profile of Serbia



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

Although Serbia is in the first third as to the representation of women in parliament and to the income quotient, it ranges among the last ten in terms of employment quotient. With regard to the share of female students and to the overall index of women-friendliness, Serbia is about in the average of the 43 countries considered. With regard to the share of migrants, Serbia ranges in the lower midfield. On the whole, the information base is still too small for further statements on migrant-friendliness.

In terms of integration in the civil society and integration into personal networks, Serbia is about in the international average. However, when it comes to integration into paid employment, Serbia ranges at the very end of the 43 countries considered. And as to the integration in the labour market, Serbia is fifth to last. With regard to the overall index of social integration, Serbia is then in the fifth to last place (followed only by China, Turkey, Greece, and at the very end by India).

Russia

Type and development trend

Russia is still not a completely democratic state. The power structures are to a large extent informal rather than by state-run institutions. The political leadership is not based on party competition, but on leading forces from the economy and the bureaucracy.

Even after the end of state socialism, the state in Russia dominates the distribution of social benefits. In the new Russian social model, the market is becoming increasingly important. According to Davidova/Manning (2009, p. 207), the interaction between these two welfare systems leads to tensions.

The political system of Russia is currently strongly linked to the people Medvedev and especially Putin. Due to the economic upswing and the national pride – based on the oil and gas exports at high prices – as well as through the support of the media, they received great approval in Russia. This economic model, however, at the same time leads to a high vulnerability of Russia towards the world market.

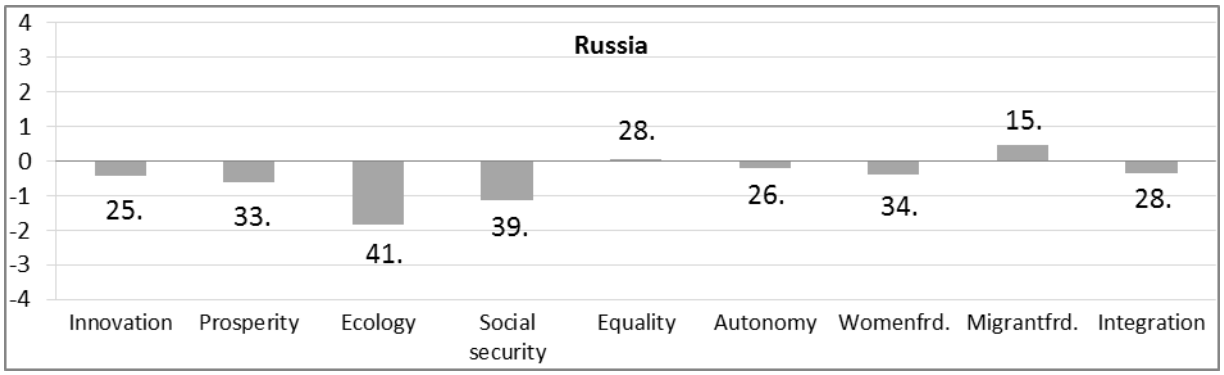
Medvedev's meeting with critics of the Russian regime pointed to an intensified liberalization of his policy. Indicators of a tendency towards development in the direction of constitutionalism were a legal facilitation for the establishment of parties as well as the change in their importance in the political system and the pursuit of an independent judiciary (see Mommsen 2010, p. 473 f.). Since the renewed presidency of Vladimir Putin from May 2012, however, the authoritarian tendencies have increased again (see Foreign Office 2017).

Russia's welfare regime is also referred to as state capitalism. This concept means the existence of private property in means of production, which, however, does not exclude state intervention in property rights.

The performance profile of Russia

With regard to private and public investments in research and development, Russia is in the international average. However, in terms of the output of these investments in the form of the spread of internet use and of the important patents, it belongs altogether to the last third. In the overall index of innovation capacity, Russia then ranges in the lower midfield. The average prosperity of Russia belongs to the last third of the 43 countries considered. The ecological burden is higher than to be expected according to the low prosperity. The CO_2 emissions as well as the overall ecological burden range among the last ten. With regard to the relief efforts, Russia is the worst performer from all 43 countries considered. The energy is used the least efficiently – probably because it is so abundantly available. In the overall index of ecological sustainability, Russia is third to last (only followed by Canada and finally by the United States).

Figure 7-13: The performance profile of Russia



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

In view of social spending of the welfare state, Russia is among the last ten, and this is also true for the great inequality of income. As to the overall educational expenditures on precaution, Russia belongs to the last third, but Russia has improved in the share of risk-readers in the sense of PISA and is now in the first third. With regard to the equality of participation in education and income, Russia ranges in the lower midfield. As to the average reading competency according to PISA and the share of top readers, Russia has improved to the international average each. With regard to the objective capability of the population to autonomy and the overall index of objective and subjective autonomy, Russia has thus also improved to the international average.

With regard to the women's employment quotient, Russia is still in the international average, but in terms of women's representation in the parliament and of the female income quotient, it is among the last third each. In the overall index of women-friendliness, Russia then also belongs to the last third of the 43 countries considered. With regard to the admission of migrants (especially from the former Soviet Republics), Russia is in the lower midfield. In terms of the participation of the migrants in the education system, it counts to the first third. In the overall index of migrant-friendliness, Russia therefore also belongs to the first third of the 43 countries considered.

In terms of integration into the employment system and into the labour market, Russia ranges overall in the lower midfield. In addition to unemployment, ineffective employment is also a problem in Russia. With regard to the integration in civil society, it belongs to the last third. In the overall index of social integration, Russia then ranges in the lower midfield of the 43 countries considered.

7.3 Performance of the post-socialist countries of Eastern Europe

In the following, an attempt is made to explain the performance of the post-socialist countries (see table 7-1) in part by the welfare logic of the regime type, the guiding principles of the policies and the correspondingly designed institutions of the countries.

The logic of the production and distribution of welfare in Eastern Europe is characterized by the state socialist heritage: the lack of effectiveness of the communist planned economy with too little use of market mechanisms, e.g. market prices show in the starting position that the post-socialist countries start with the lowest average prosperity. However, as some of the Eastern European countries are more innovative than some Southern countries, there is already a process of recovery and overhaul in prosperity. Because priority is given to economic growth, the welfare state's aftercare spending for the risk case is largely weak. In terms of investment in the education system, Poland and the Baltic countries are more proactive. Equality of participation is more pronounced in Slovenia and the Visegrád countries, because the development was not dominated by the economically liberal direction; the division of power tends to be more balanced. In the capability of the population to autonomy on the basis of a high level of education, the post-socialist countries are in general back, as the priority is too one-sided on economic growth. In terms of women-friendliness, the Baltic states are the closest to the egalitarian heritage, while in the Central European countries traditional gender roles are again emerging due to confessional traditions, but the general trend towards modernization applies to all countries. Eastern Europe admits hardly any migrants, because it is absorbed by its own problems and little open to the "foreign".

In view of innovation capacity, the tripartite coordinated development path of Slovenia has so far produced the best overall result among the post-socialist countries (place 13 among the 43 countries considered). Estonia and the Czech Republic are close to the international average; the laggards Serbia, Bulgaria and Romania range at the bottom. With regard to living standards, Slovenia, the Czech Republic and Slovakia have improved to the international average, while the latecomers Serbia, Bulgaria and Romania are again at the bottom.

With its very low ecological burden and its large relief efforts, Latvia ranks at the top of all 43 countries considered with regard to the overall index of ecological sustainability. Lithuania and Estonia also belong still to the top third in the overall index. Russia is the outlier in ecology; it is one of the last ten in terms of the ecological burden, and at the very end in terms of energy efficiency – probably because of its resource wealth – and in the overall relief efforts. In the overall index of ecological sustainability, Russia ranges third to last, followed only by Canada and the United States.

Table 7-1: Performance profiles of the post-socialist countries

Country	Innovation	Prosperity	Ecological sustainability	Social security	Equality of participation	Autonomy	Women-friendliness	Migrant-friendliness	Social integration
Bulgaria	-1,25	-0,97	-0,63	-0,84	-0,84	-1,24	0,12	-1,58	-0,22
	40	38	34	36	38	38	20	40	27
Estland	-0,03	-0,43	0,52	-0,62	0,10	0,29	0,38	0,14	-0,13
	20	28	15	35	25	22	15	19	24
Croatia	-0,67	-0,83	0,96	-0,36	0,48	-1,06	0,15	0,73	-0,87
	33	35	9	31	16	34	19	9	37
Latvia	-0,53	-0,65	1,78	-0,62	0,01	-0,72	0,31	0,27	-0,55
	29	34	1	34	29	29	17	17	33
Lithuania	-0,49	-0,41	0,81	-0,58	0,10	-1,05	0,37	0,02	0,01
	28	27	10	33	26	33	16	24	21
Poland	-0,83	-0,53	0,31	-0,04	0,65	0,30	0,39	0,72	0,12
	34	30	18	22	11	21	14	10	19
Romania	-1,34	-0,84	0,67	-1,75	-1,18	-1,46	-0,12	-0,49	-0,38
	42	36	11	41	40	40	29	32	30
Russia	-0,43	-0,62	-1,85	-1,13	0,03	-0,21	-0,40	0,47	-0,34
	25	33	41	39	28	26	34	15	28
Serbia	-1,22	-1,30	-0,02	-0,17	-1,09	-1,68	0,31	-0,25	-1,21
	39	41	22	26	39	41	18	27	39
Slovakia	-0,62	-0,34	-0,29	-1,05	0,46	-1,26	-0,01	-0,97	-0,21
	31	26	29	38	17	39	26	37	26
Slovenia	0,39	-0,29	-0,03	0,45	0,94	0,67	1,29	-0,21	0,36
	13	25	23	13	4	15	4	26	16
Czech Republic	-0,06	-0,22	-0,22	-0,33	0,96	-0,22	-0,08	-0,38	0,38
	21	24	28	30	2	27	28	29	15
Hungary	-0,23	-0,56	-0,53	-0,05	0,19	-0,83	-0,59	1,40	-0,03
	22	31	32	23	24	30	37	4	22

Indicated are the z values (top line) and rank places (bottom line) of the countries for the examined performance criteria.

Of the post-socialist states, only Slovenia belongs to the first third both in the prevention by education and in the aftercare by the welfare state (place 13 in the overall index of social security). Like the continental European countries, the Visegrád countries focus more on the aftercare by the welfare state than on prevention by education, whereby Poland already invests relatively more in education. The Baltic states, like economically liberal countries, prefer priority to prevention by education rather than to the aftercare of the welfare state. The latecomers Romania and Bulgaria, as well as Croatia and Serbia, are among the last eleven of the 43 countries considered with regard to the prevention through education.

As to the equality of participation, the Czech Republic and Slovenia are overall in second and fourth place, the Czech Republic has the lowest income poverty rate and Slovenia the second lowest income inequality. The Visegrád states have less income poverty than educational poverty, with Poland investing more in prevention through education and performing relatively better there. The Baltic countries have relatively less educational poverty than income poverty – such as economically liberal countries –, because the development of the welfare state is not a priority. The latecomers Romania and Bulgaria as well as Serbia belong to the last six in the equality of participation in education and income. Russia ranges among the last ten of the 43 countries considered both in terms of welfare state expenditures and of income poverty.

In terms of the objective capability of the population for autonomy and the subjective assessment of the freedom of choice of the way of life by the population, Slovenia again performs best among the post-socialist countries (place 15). It is followed by the Visegrád states and the Baltic countries. In the overall index of objective and subjective autonomy, the latecomers Serbia, Romania and Bulgaria as well as Croatia belong to the last ten of the 43 countries considered.

In the overall index of women-friendliness, Slovenia again performs best among the post-socialist countries (place 4). It is followed by the Baltic states, where women have an above-average participation in education and employment. With more traditional gender roles, the Visegrád countries of the Czech Republic, Slovakia and Hungary range behind the Baltic countries in the overall index of women-friendliness.

In Eastern Europe, there are few migrants in the narrower sense. Rather, due to the political upheaval, there is the problem of Russian-speaking minorities in the Baltic countries, which has been best handled in Lithuania through more open naturalization rules, whereby the minority in Lithuania is below 10%, and in Estonia and Latvia, on the other hand, at ca. 25-30%. There is also the problem of resettlement as a result of past armed conflicts, especially in Serbia and Croatia. In the current admission of refugees, the Eastern European countries are very restrictive.

In terms of integration into the employment system and into the labour market, the laggards Serbia and Croatia are among the last six of the 43 countries considered. When it comes to the participation in civil society, the three Baltic states – alongside Russia, Slovakia and Hungary – are among the last ten. In the overall index of social integration, only the Czech Republic and Slovenia are at the end of the first third, the rest of the countries are all inferior. The latecomers Croatia and Serbia belong to the last seven of the 43 countries considered. In particular, civil society is still poorly developed in the post-socialist countries.

As subgroups or development paths crystallize: The tripartistically coordinated development of Slovenia, which led to balanced investments in prevention

through education and in aftercare by the welfare state as well as to a high equality of participation in education and income. The Visegrád countries Czech Republic, Slovakia and Hungary invest relatively more in aftercare by the welfare state than in prevention through education and thus achieve relatively less income poverty than educational poverty. For Poland, on the other hand, it is the same as for the Baltic states, which, like the economically liberal countries, invest more in prevention through education and thus achieve relatively less educational poverty than income poverty. The Visegrád countries Czech Republic, Slovakia and Hungary are below average in the overall index of women-friendliness, while Poland, like the Baltic countries, is above the average. Russia and the socio-economic laggards Romania and Bulgaria, as well as Croatia and Serbia, are among the last eleven of the 43 countries considered to be investing in prevention through education. The political contexts of these developments include tripartite coordination in Slovenia, the dominance of economically liberal parties in the Baltic countries and the frequent political changes in the Visegrád states.

8. Case study on Turkey

Type and development trend

Turkey can be attributed to traditional and patriarchal welfare logics, with social security not only dependent on belonging to a family clan. Since modern, Western and democratic elements are opposed to traditional values and Turkish nationalism, Turkey cannot be seen as a prototype of patriarchal welfare regimes. There are parallels with the familistic welfare type. There is also a growing trend towards economic liberalism as part of efforts to join the EU.

For many, the family remains the central body of social protection, even if it can no longer provide the same degree of protection for the family members as in the past. The risk of poverty is particularly high among large families and has already led to the dominance of core families in urban regions. As in most Western countries, a future challenge for social security will be demographic change, even if Turkey has so far the youngest population in Europe (see Grütjen 2008, p. 3 ff.).

In medium term, a gradual modernization of the patriarchal welfare regime is to be expected, although at the moment setbacks dominate.

The performance profile of Turkey

In the following, an attempt is made to explain the performance of Turkey (see Table 8-1) in part by the welfare logic, by the guiding concepts of the policies and by the correspondingly developed institutions.

The logic of production and distribution of welfare in Turkey is formed by traditional values. The national state and the patriarchal families are the central

welfare institutions. The tension between the secular state and religious traditions still carries conflicts. So far, the political priorities have been geared to economic growth, the social state has remained rudimentary. As a result, the provision of care work remains in major part the task of the families.

Table 8-1: The performance profile of Turkey

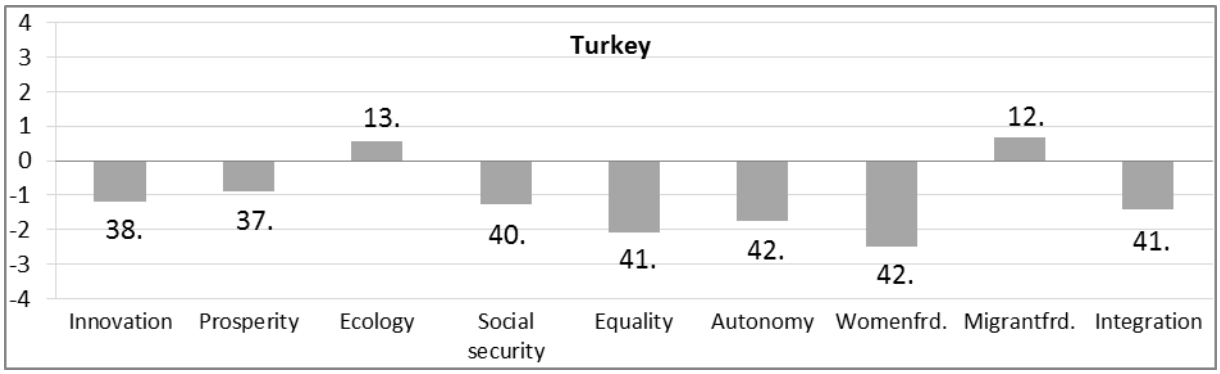
Country	Inno-vation	Pro-sperity	Ecological sustain-ability	Social security	Equality of parti-cipation	Auto-nomy	Wo-men-friend-liness	Mig-rant-friend-liness	Social integra-tion
Turkey	-1,17	-0,91	0,55	-1,28	-2,08	-1,74	-2,48	0,66	-1,43
	38	37	13	40	41	42	42	12	41

Indicated are the z values (top line) and rank places (bottom line) of the country for the examined performance criteria.

In view of private and public investments in research and development, Turkey is among the last ten of the countries considered. It is also among the last ten in terms of output in the form of the dissemination of internet use and in the important patents. In the overall index of innovation capacity, Turkey is also among the last ten countries of the 43 countries considered. This also applies to the average prosperity. As a downside of low prosperity, environmental pollution is also low. In terms of relief efforts, Turkey is slightly below the international average. But for the overall index of ecological sustainability, Turkey is among the first third of the 43 countries considered because of the low environmental burden.

With regard to aftercare social expenditure, Turkey belongs to the last ten of the 43 countries considered, and this is also true for the large income inequality and the high income poverty risk. Turkey is also among the last ten in terms of total educational expenditure as precaution. This also applies to the high proportion of risk-readers in the sense of PISA. In the overall index of the equality of participation in terms of educational opportunities and income, Turkey is in third to last place, followed only by Brazil and at the very end by South Africa. With the average reading competency according to PISA and the share of top readers, Turkey belongs to the last five. This also applies to the objective capability of the population for autonomy. Taking into account the very low level of satisfaction of the population with the freedom of choice, Turkey ranges on the penultimate place in the overall index of objective and subjective autonomy among the 43 countries considered (only followed by Greece).

Figure 8-1: The performance profile of Turkey



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

According to the religious tradition, Turkey ranks among the last five in the women's employment quotient and in the female income quotient. In the overall index of women-friendliness, Turkey then ranks in the penultimate position, only followed by India. As to the share of migrants, Turkey is only in the last third, but Turkey is in the first third with regard to naturalizations as well as in the participation of the (few) migrants in the education system and on the labour market. In the overall index of migrant-friendliness, Turkey thus belongs to the first third of the 43 countries considered. – The fact is also worth noting that Turkey has admitted about 2,9 million refugees from Syria, which in part has not yet been taken into account in international statistics. Since August 2016, a law stipulates that work permits are assigned according to a point system.

In terms of integration into the employment system, Turkey is among the last five because of the traditional gender roles, and this also holds for the integration in civil society. In the overall index of social integration, Turkey is then in the third to last place of the 43 countries considered (followed only by Greece and India).

9. The productivist welfare regime of East Asia

9.1 Commonalities and particularities of the productivist countries

Ian Gough, following Holliday (2000), describes the distinctive feature of productivist welfare regimes with privatized welfare as an organization of social policy in which it is not a separate area of politics, but is subordinated to the growth objectives of economic policy (see Gough 2004, p 183). Social policy is mainly used to ensure employability, in order to strengthen productivity and competitiveness. Public social spending, and thus the level of social welfare, is very low, but efforts are being made to support community cohesion in order to maintain social protection in family networks. The state is predominantly

limited to a regulatory role rather than providing all the necessary welfare services (see Gough 2004, p. 182 ff.).

Amable (2003) and Lane (2007) see an additional peculiarity of the East Asian region in the dependency of the welfare system on the large enterprises and the privatization of tertiary education. Public expenditures on higher education are relatively low, although education plays an important role in the East Asian region. Private universities with high study fees make up the bulk of the university's offerings (see Amable 2003, p 174; Lane et al 2007, p 19ff.).

The East Asian states are usually counted among the productivist welfare regimes. In the following, Japan and South Korea are considered in more detail.

The East Asian states have an economy oriented towards growth as well as innovation and have experienced a dynamic development towards capitalist market economies. The financial system is centralized. In cooperation with the government, large enterprises dominate the domestic market, which is protected against foreign investors. Strong work discipline and identification with the enterprises are widespread, particularly in Japan and South Korea.

Rapidly rising incomes allow for a high savings rate and a rapidly increasing private financing of welfare. A low tax burden and little state welfare benefits intensify this. Enterprises play a crucial role in social security (see Gough 2004, p. 184). Especially larger enterprises offer their employees special insurances. These were initially supported by the government to reduce public spending in the long term. In Japan, enterprises have traditionally played an even more important role in social security than in South Korea. Numerous large Japanese enterprises offer their employees not only lifelong employment but also company health insurance and retirement provision. Although many enterprises are now turning away from the model of lifelong employment due to economic pressure and want to take on less social security tasks in the future. South Korea, which once adopted this model from Japan, put it already back in the financial crisis in 1997 due to a lack of flexibility and a financial burden on enterprises.

The "male-breadwinner model" is widespread, supported by the policy of the enterprises. The wages of working men are intended for the whole family, preserving the old structures. The overall inequality of the income is reduced by the distribution of income within the family to the wife and the parents. This family system is being strengthened by the lack of involvement of women and young adults in the labour market (see Gough 2004, p. 184). Nevertheless, the traditional role of women emerging from Confucianism is slowly being pushed back. The number of women in employment is growing steadily. The role of the family as a social network of reciprocal aid to compensate for the lack of state services is markedly declining.

Family structures have changed, especially in Japan. Smaller families and other alternative family forms displace the traditional family form. Although many

older people still live with their children under one roof, the proportion of three-generation families is declining (see Gough 2004, p. 184).

The economic success of the East Asian states led to an expansion of state social policy, which is, however, still relatively rudimentary. Social policy focuses on education and health care. Due to the rudimentary public security, there is a need for citizens to secure themselves through family networks and the market (see Gough 2004, p. 190 f.).

Government expenditure on health care is relatively low. Although hospitals and health centers are often provided by the state, a large part of the costs have to be paid by the patients. The coverage of public health insurance is insufficient.

Also the public insurances for unemployment as well as pension are only insufficiently covering the corresponding risks with their low level of benefits. The insurances concerning old age, illness and work accident are financed by contributions of employees and employers as well as the government.

Great importance is attached to the education sector, with regard to economic development and competitiveness, especially in comparison with other Asian countries. Specifically in primary education, universal education is an important asset. The education systems are relatively well developed, very competitive, and are characterized by strict authority. A selection takes place only after nine common school years. Life-long learning also plays an important role outside the enterprises.

9.2 Case studies on the individual countries

Japan

Type and development trend

Japan is one of the productivist welfare regimes with status preserving elements and privatized tertiary education.

In view of the dominant conservative political orientation, no change in direction can be expected in the near future. The existing difficulties will be maintained. Through too little action during the Asian financial crisis in 1997, Japan lost in esteem within the region, especially in comparison to China.

After fifty years of government, the liberal-democratic party was voted out of office in 2009. The electoral victory of the Democratic Party can be partially explained by the economic stagnation that has been going on for years. The orientation towards the USA should be reduced in favor of a stronger cooperation with the Asian neighbors of China and South Korea.

Other targets included an increase in child allowances, a reduction in previously raised health insurance contributions, a minimum income for farmers and the introduction of a minimum pension. However, the implementation of these

objectives has been sluggish due to the high level of debt and the sustained implementation by the bureaucracy.

Since the earthquake and nuclear disaster of March 2011, Japan had to change its political priorities. The focus is now shifted to the reconstruction of the country. The government debt, which was already above 200 % of GDP before the nuclear disaster, must be reduced, which is a difficult situation.

Since the Liberal Democrats took over the government in December 2012 and the recent confirmation in the elections in October 2017, stimulus programs and export promotion through the devaluation of the yen have focused on economic growth. The productivist orientation towards the world market remains dominant.

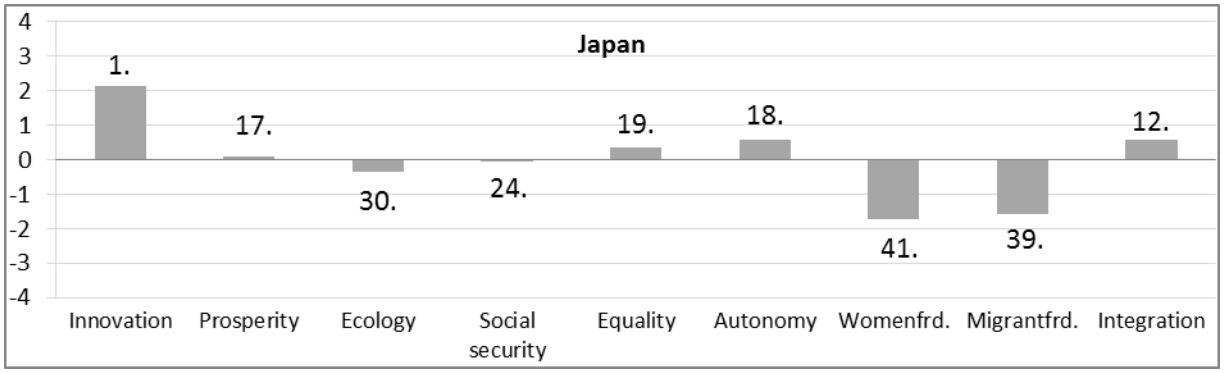
The performance profile of Japan

Japan is at the forefront of the ability to innovate, corresponding to the productivist welfare logic, which focuses on competitiveness on the world market and on export efficiency. In Japan's private spending on research and development, Japan ranks second (behind South Korea). In terms of the dissemination of internet use, Japan ranks eighth. Economic profit is the goal, correspondingly Japan is second as to the most important patents and at the top with regard to the overall index of innovation. Japan's average prosperity is in the upper midfield, since economic growth in Japan, with its aging population and very low immigration, has been moderate since the bursting of the real estate bubble. The government debt, which is attributable to the economic stimulus programs, was already 200 % of GDP before the earthquake disaster of March 2011. Since, according to the productivist welfare logic economic growth in Japan has absolute priority, the aspects of environmental sustainability are treated as subordinate. In the strong use of nuclear power technology, Japan counted to the last third before the nuclear disaster of 2011; it has reduced nuclear power plants in the meantime, but plans to reenter. In the relief efforts Japan ranks in the last third. In the overall index of environmental sustainability, Japan also belongs to the last third of the 43 countries considered.

With regard to the aftercare social security spending, Japan ranks in the upper midfield. Due to the strong segmentation in core employees, marginal employees and suppliers, Japan has too high relative poverty, with Japan being among the last third of the 43 countries considered. On the other hand, the population is also oriented towards productivist logic by investing heavily in the education of their children. With its low proportion of risk-readers, Japan is at the forefront. While income poverty is high, educational poverty is low. Thus Japan is slightly above the international average in the overall index of equality of participation in education and income. In terms of the share of total education expenditure in GDP, Japan ranges below the international average. On the other hand, the population is also oriented towards the productivist logic by investing heavily in

the education of their children. With its low proportion of risk-readers, Japan is at the forefront. While income poverty is high, educational poverty is low, so that Japan is slightly above the international average in the overall index of equality of participation in education and income. Japan is below the international average for all educational expenditures. But education is so important in the Japanese tradition that the families finance the tuition, if required, to promote school success. As a result, the Japanese educational system, which is operating at a high competitive pressure, is very successful. The investments in the education of children are reflected in a good place both in the average reading competency according to PISA as well as in the share of the top readers. If, in addition to the good objective capability to autonomy, the average satisfaction of the population with the freedom of choice is taken into account, with regard to the total index of autonomy Japan is in the upper midfield of the 43 countries considered.

Figure 9-1: The performance profile of Japan



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

In the representation of women in parliament, Japan, with its very traditional gender roles, ranges at the very end. Japan is one of the last ten in the proportion of female students, in the employment quotient and in the income quotient. Japan is the third last in the overall index of women-friendliness among the 43 countries considered (followed only by Turkey and India). As to the admission of migrants, Japan has a share of 1,6 % and ranges among the last ten of the 43 countries considered. In the participation of the (few) migrants in the education system, Japan belongs to the last third according to the difference in reading competence between pupils with an immigration background and the other pupils. Thus, Japan is one of the last five of the 43 countries observed in the overall index of migrant-friendliness.

As to economic integration, Japan has improved to third place in recent years as a result of the reconstruction measures. Integration in civil society is slightly below the international average, and the integration into the personal relation-

ship networks counts to the first third. In the overall index of social integration, Japan then also belongs to the first third of the 43 countries considered. The good integration of the locals in their families, in the enterprises and in the nation is an important characteristic of Japanese society.

South Korea

Type and development trend

Before the economic crisis in 1997/98, three characteristics suggested a proximity to the conservative welfare regime. On the one hand, the welfare structure, a compulsory insurance system with public support for the poor, and the important role of the family as a welfare provider. Both the Catholic Church and the Confucian tradition ascribe a central role to the family with regard to social welfare. The third indicator is the tendency to maintain the current situation instead of a change.

Despite the similarities with the conservative system, the South Korean welfare system has specific characteristics. Thus the political tensions between employers and workers, unlike in the European conservative states, had little effect on social policy. Instead, the authoritarian governments have evoked a development that ended in a fragmented welfare system that favored the state elite and industrial workers. The redistribution elements strengthened existing inequalities and just the vulnerable part of the population was not protected to the same extent as the workers.

With its most important characteristics, Korea belongs to the productivist East Asian welfare model. Dynamic economic growth and low social spending, while maintaining social cohesion, are characteristic of the East Asian states (see Kwon 2006, p. 733 f.).

Since in South Korea social policy has still the task of ensuring productivity as well as social security, and social protection is largely organized through the market, South Korea can be attributed to the productivist welfare regime. This is also matched by the extreme performance orientation in the education system, which led to top places in the PISA evaluations.

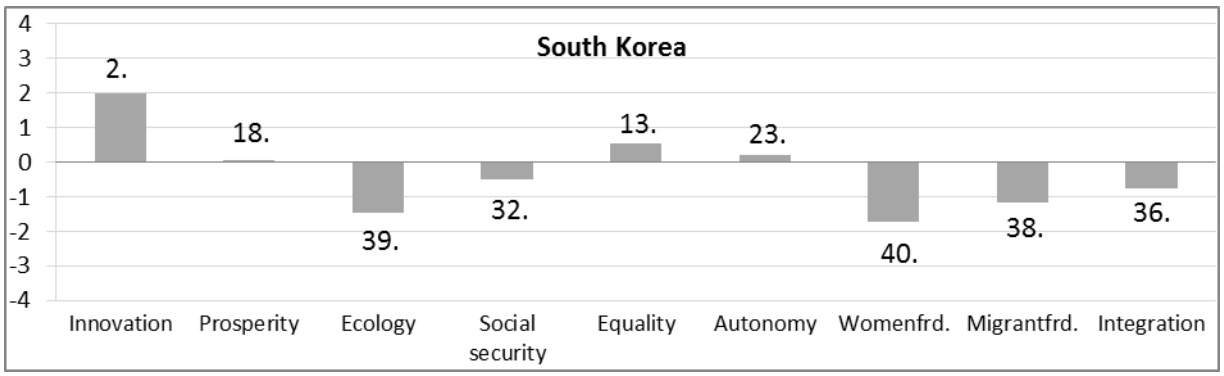
Although many reforms have led to a more comprehensive social policy under the Kim government, further steps towards a welfare state are needed. Government spending on social protection is still not at a sufficient level and the high share of self-participation in health insurance is too great a burden on citizens. In international comparison, South Korea has relatively low expenditures in the area of social welfare, while above-average expenditures on economic development.

The new, social-liberal president Moon, who has been in office since May 2017, is seeking a policy of deténte with North Korea.

The performance profile of South Korea

South Korea has reached the top rank of all 43 countries in terms of private sector investment in research and development. With regard to public investment, it is second. Considering as well the output, South Korea also ranks on second place as to the overall index of innovation capacity. In average prosperity, South Korea ranks still at the beginning of midfield, but it is on the rise. South Korea is clearly focusing its attention on economic growth so that it belongs to the last third with regard to environmental pollution. It is one of the last five in the relief efforts, and this also applies to the overall index of ecological sustainability. In the use of renewable energies, South Korea ranges even at the very end of the 43 countries considered.

Figure 9-2: The performance profile of South Korea



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

With regard to the aftercare social security spending, South Korea ranges because of the economically liberal politics on the 40th place of the 43 countries considered. A strong point in South Korea, on the other hand, is the high investment in the education system to promote the human capital needed for the export-oriented growth model. Accordingly, South Korea is ranked only in the lower midfield as to the income poverty rate, but with its low proportion of risk-readers in the sense of PISA, South Korea belongs to the top. In the overall index of the equality of participation in education and income, South Korea ranks thus in the first third of the countries. With its high education investments, South Korea is among the top performers both in terms of average reading competency according to PISA and in the share of top readers. With regard to the objective capability of the population to autonomy, South Korea reaches third place, hence, the educational system is very powerful. On the other hand, the high performance pressure is accompanied by a low level of satisfaction of the population with the freedom of choice of the way of life; in this respect South Korea is among the last ten of the 43 countries considered. Altogether, South Korea has a very striking productivist profile. In the overall index of

objective and subjective autonomy, South Korea is then in the international average.

The gender roles are still very traditional. In the proportion of female students, South Korea is in the third to last place, in the employment ratio as well as in the income ratio it belongs to the last five. In the overall index of women-friendliness, South Korea then ranges on the fourth to last place, followed only by Japan, Turkey and at the very end of India. With regard to the openness for migrants, South Korea is among the last ten of the 43 countries considered. For the participation of the (few) migrants in the education system and in the labour market, there is no information on South Korea in the international surveys.

In terms of economic integration, South Korea is in the upper midfield. But when it comes to integration in civil society, South Korea ranks in the last third. In the integration into personal networks, South Korea counts to the last five. With regard to the overall index of social integration, this makes South Korea one of the last ten countries of the 43 countries considered.

9.3 Performance of the productivist countries of East Asia

In the following, an attempt is made to explain the performance of the productivist countries in part by the welfare logic, the guiding concepts of the policies and the corresponding institutions.

The welfare logic of East Asia has been developed by Japan, it aims at success on the world market and has therefore been characterized as "productivist" (Holliday 2000). By systematic and coordinated technology development the competitiveness on the world market shall be increased. Issues of social protection are subordinated to this goal, social protection is left to the large enterprises and the care work to the women in the family. In Japan, the strong breadwinner model still dominates, but as in all countries a modernization process is taking place in gender roles.

Table 9-2: Performance profiles of the productivist countries of East Asia

Country	Innovation	Prosperity	Ecological sustainability	Social security	Equality of participation	Autonomy	Women-friendliness	Migrant-friendliness	Social integration
Japan	2,13	0,10	-0,34	-0,07	0,36	0,57	-1,72	-1,57	0,59
	1	17	30	24	19	18	41	39	12
South Korea	1,99	0,05	-1,45	-0,51	0,54	0,21	-1,72	-1,18	-0,76
	2	18	39	32	13	23	40	38	36

Indicated are the z values (top line) and rank places (bottom line) of the countries for the examined performance criteria.

Japan and South Korea are together at the forefront of innovation capacity, corresponding to the productivist welfare logic, which focuses on competitiveness on the world market and on export efficiency. Japan and South Korea are on the first two places with respect to private spending on research and development. The economic advantage is the goal, so Japan reaches the second rank (behind Switzerland) in the important patents. In the overall index of innovation capacity, Japan has improved to the first place. South Korea is ahead of Japan in public investment in research and development and has risen to second place (behind Japan) in the overall innovation index. Among others because of the better patent balance, with regard to prosperity Japan ranks in the upper midfield ahead of South Korea.

In the strong use of nuclear technology, before the nuclear disaster of 2011, Japan ranged in the last third, in the meantime in the international average, but plans to reenter. South Korea also places its priority so clearly on economic growth that it is the last third with regard to the environmental burden. In the relief efforts, Japan was among the last five before the nuclear disaster, now due to the shutdown of nuclear power plants in the last third. In the overall index of ecological sustainability, Japan ranks at the beginning of the last third due to the weak relief efforts. South Korea is even less involved in relief efforts, it counts to the last three. For instance in the use of regenerative energies, Japan is ranked 41th and South Korea even in the last place. In the overall index of environmental sustainability, South Korea is thus one of the last five of the 43 countries considered.

As far as social security is concerned, Japan and South Korea clearly place their priority on education rather than aftercare by the welfare state, with South Korea being even more extreme in terms of investment in education (rank 11), but ranking only 40th in aftercare social security spending. Accordingly, South Korea is ranked 1 and Japan 2 in attaining low educational poverty, while both are below average in income poverty. The population is also oriented towards the productivist welfare logic by investing heavily in the education of their children. As a result, the productivist education systems, which are operating with high competitive pressure, perform very well. The investments in the education of children are reflected in top positions both in the average reading competency according to PISA as well as in the share of top readers. If one considers, in addition to the objective capability for autonomy, the sub-average satisfaction of the population with the freedom of choice, Japan is in the upper midfield as to the overall index of autonomy, because it belongs to the first third as to the objective capability for autonomy and in the international average as to subjective autonomy. In the overall index of autonomy, South Korea ranks in the international average, because it counts to the top five as to the objective capability for autonomy, but ranges in the last third of the 43 countries considered with respect to subjective autonomy.

The gender roles in Japan and South Korea are still very traditional. In the employment quotient, both countries are among the top ten. Japan is in the last place in the representation of women in parliament. In the overall index of women-friendliness, South Korea and Japan are then in places 40 and 41, only followed by Turkey and at the very end by India.

With regard to the openness for migrants, Japan and South Korea belong to the last third. In the case of the participation of the (few) migrants in the education system, Japan ranks in the last third (there is no information on South Korea in the usual surveys). In the overall index of migrant-friendliness, South Korea and Japan thus rank in places 38 and 39 of the 43 countries considered.

In view of economic integration, Japan has improved to the third place in the context of the reconstruction measures, whereas South Korea ranges in the upper midfield. In Japan, the integration in civil society is slightly below the international average. The integration into personal support networks is well developed, making Japan belong to the first third as to the overall index of social integration. South Korea counts to the last third with regard to the integration in civil society. The integration into personal support networks is less well developed in South Korea. With regard to the overall index of social integration, South Korea is therefore one of the last ten of the 43 countries considered.

10. Welfare regimes in Latin America

10.1 Commonalities and particularities

The welfare systems of the Latin American states are distinguished in the literature above all according to the time of their formation. Mesa-Lago (1978) identifies the pioneer countries (Argentina, Chile, Uruguay, Brazil), whose social security systems developed between 1920 and 1930, are stratified and were formed at the initiative of the state or interest groups. A second group of countries (Mexico, Costa Rica, Ecuador, Paraguay, Peru, Venezuela and Colombia) introduced social security between 1940 and 1950. Although their social security systems should cover the whole population, in practice only the most influential population groups have benefited. The last group of countries (Nicaragua, El Salvador and the English-speaking Caribbean countries) introduced social protection systems only in the 1950s. Here the range is usually even lower and the benefits are residual (see Mesa-Lago 2008, p. 6). The degree of stratification decreases clearly from the pioneer countries to the third group of countries. In most countries, however, military personnel benefited from their own high-performance social security system (with the exception of Costa Rica and Panama), and there were often systems for the state employees (see Mesa-Lago 2008, p. 9 and p. 15).

The cause for the staggered development of the welfare state is the different degree of industrialization and urbanization, the size of the formal sector and the

age of the insurance system. Thus, the countries of the pioneer group have the highest levels of industrialization, urbanization, formal labour and the oldest system, whereas the third group of countries has the least industrialization, a low urban population, a large informal sector and a very young social system (see Mesa-Lago 2008, p. 7).

Economic and social policy

Economic policies are similar in many Latin American countries, although they differ in their level of average prosperity. In the 1950s, many began to promote the development of their own industry and to control foreign trade more strongly. This import-substitution policy was pursued until the 1970s (see Uribe Goméz 2007, p. 434). Mostly it went hand in hand with the development of the welfare state (see Dion 2008, p. 434). But quickly the limits of this policy became clear. For example, it has not been possible to integrate the poor rural population, to ensure full employment or to reduce inequality. The economically liberal critique blamed state interventionism for the debt problems, which occurred at the beginning of the 1970s. There was a departure from the import substitution policy and a gradual opening of the markets. Although initially there was no significant reduction in social protection, the state lost its central position in controlling social and economic life (see Ulribe Goméz 2007, pp. 437-439).

In the 1980s, many Latin American countries fell into a debt crisis. Structural changes were required to boost economic growth and reduce inflation. With the help of the World Bank and the IMF, neoclassical concepts have been developed, including privatization, de-monopolization and deregulation. Under pressure from the international community, these reforms have been vigorously enforced. Against the background of authoritarian regimes and strong interest groups in many countries, there was clientelism, stratification of social benefits, exclusion of large sections of the population and fragmentation of social benefits (see Ulribe Goméz, pp. 442 f.).

A second wave of reforms took place at the beginning of the 1990s. The focus was on the privatization of state-owned enterprises as well as on increasing efficiency and profitability in the public sector (see Ulribe Goméz 2007, p. 444).

The reform programs of the 1990s in the fields of labour law, education, health and pensions varied widely, depending on the national context. This is mainly due to the fact, that some countries were still governed authoritatively, while others had established a democratic form of government (see Ulribe Goméz 2007, p. 445).

The aim of the reforms was to adapt the social security systems to the aging society and to curb the rising costs of health care. In addition, cash benefits were often strictly linked to contributions, a private insurance market was opened and freedom of choice was established between different insurance providers. Whereas the pensions systems succeeded in establishing a common basis of

calculation in private and legal systems, the health systems are characterized by a great inequality in terms of benefits granted. Apart from the basic insurance there are a variety of different insurance programs. More gender justice was not established (see Mesa-Lago 2008, pp. VI-VII and p. 10).

The reforms of the 1990s resulted in a reduction of workers' rights and greater fragmentation of organized groups due to decentralization (see Uribe Goméz 2007, p. 444). In fact, in many countries three insurance models co-exist: one private, one statutory and one for state employees. The solidarity principle is not respected in many countries. In the pioneer countries, the high stratification contradicts the principle of solidarity; in the third group of countries, this is opposed, above all, by the short range. The informal sector is excluded from almost all social security benefits (see Mesa-Lago 2008, pp. 11 f.).

Gender roles

In Latin America, there is a strong influence of the Catholic Church. The wide spread of Christian values and role models has great impact on the life situations and especially on the paid employment of women. Machismo is widespread, i.e. a world view with dominance of the man. In many cases, women are subject to restrictions by their families and fulfill the dual role of a professional and a housewife (see Del Campo 2005, p. 1719). Overall, the family plays an important role throughout Latin America, both as a social network and as a primary reference group. This is especially true for the children, who grow up in a network of kinship relationships and are generally cared for there (see Kuznesof 2005).

The paid employment of women is almost everywhere lower than that of men. This is mainly due to the time off, which the women take for pregnancy and the education of children. However, this means, that women achieve fewer contribution years during their working life. In some cases this may mean, that they fail to reach the minimum contribution years for a pension entitlement. Especially in the pension systems, which are based on individual capital accumulation, women are therefore increasingly threatened by poverty in old age. Women's work is also concentrated in a few (mostly lower-paid) areas. In addition, they are more likely to work half-days to reconcile work and family life. And this in turn means lower contributions and thus a lower pension (see Bertanou 2006, pp. 9 f.).

Most Latin American health systems discriminate against women. First of all, their access is more limited, because they work more often than men in the informal sector and more often leave the profession. Private providers exclude women of reproductive age, as they fear higher costs due to pregnancy. In almost all countries, more women than men are not covered by health insurance (see Mesa-Lago 2008, p. 211).

The participation of women in the government remains well behind that of the males, women quotas exist only in very few countries.

In contrast, programs to promote women exist in almost all Latin American countries. Most of them were created after the "World Conference of Women" (see Del Campo 2005, p. 1716).

Education

The education systems in Latin America are relatively similar. They usually start with an (optional) preschool. This is followed by elementary school (usually six years), followed by a secondary school. This then entitles, partly after the further visit of a preparatory school, to study. A selection according to performance does not take place.

More important here is the economic factor. For example, the poorer population is usually unable to finance a long schooling, so their children are leaving the school system earlier.

Attention should also be paid to the great importance of private educational institutions. They are only open to high earners and can usually provide better educational results due to the better financing.

10.2 Welfare logic and institutions of Brazil

Type and development trend

Brazil was one of the pioneers of the welfare state in Latin America. Already in the 1920s, there were first beginnings of social security. The orientation on the Bismarck system has remained, at least in the pension system, until today. The amount of the pension is based on the previous income, so it is above all status-conserving. The pension system is subject to a slight stratification by occupational groups. In addition, there is basic security at a low level, which is linked to a means test. Unlike the Argentine or Chilean pension system, the Brazilian pension system is coordinated by the state and not just by the market mechanism.

The public health system, as well as the pension system, is funded by employees and employers. It provides equal benefits for all income-related contributions. Both the pension system and the healthcare system are tied to formal employment. The state welfare sector is supplemented by a strongly developed private sector.

In recent years, special investments have been made in the basic protection of those, who were not formally employed and thus had no access to the welfare system. However, these benefits are residual in the sense of the economically liberal welfare regime and are linked to a means-test.

In Brazil, there is a strong influence of the Catholic Church and, accordingly, gender roles are more traditional Christian. Overall, Brazil is thus a hybrid of the conservative and the economically liberal model. Under the new government (since 2016), the economically liberal tendencies will probably be strengthened.

10.3 The performance profile of Brazil

Brazil was one of the pioneers of welfare state development in Latin America, having introduced a Bismarckian social security system already in the 1920s. Despite changes to dictatorship and again to democracy, social security was gradually expanded, because it was understood as a means of securing the people's loyalty.

According to Barrientos (2004), Brazil developed after the military dictatorship (1964-1985) under the Cardoso government (1995-2003) from a conservative-informal welfare regime to a liberal-informal welfare regime. Under the Lula da Silva government (2003-2010) and then under its successor Dilma Roussef, Brazil tended to develop into a liberal social-democratic welfare regime (see Fischer/Leubolt 2012): the Lula da Silva government raised minimum wages and significantly reduced the poverty rate through social transfers to needy families.

With regard to both the spread of internet use and the most important patents, Brazil belongs to the last ten. This then also applies to the overall index of innovation capacity. In terms of average prosperity, Brazil has deteriorated to place 40 among the 43 countries considered as a result of the economic crisis of 2014-2016. With its very low ecological burden per inhabitant, Brazil is in third place (behind India and China). It has e.g. very low CO_2-emissions. Also in the relief efforts, Brazil belongs to the top with its very high share of renewable energies. Brazil thus achieves a good fourth place in the overall index of ecological sustainability.

Table 10-1: The performance profile of Brazil

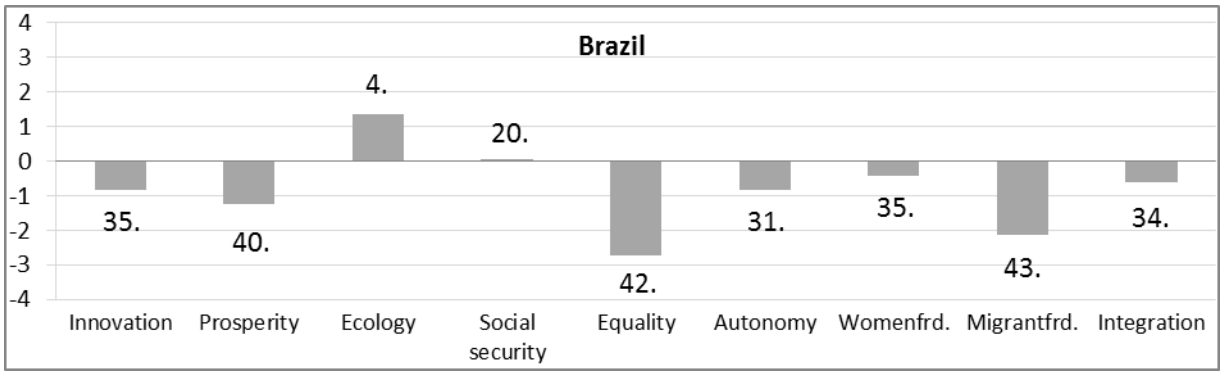
Country	Inno-vation	Pro-sperity	Ecological sustain-ability	Social security	Equality of parti-cipation	Auto-nomy	Wo-men-friend-liness	Mig-rant-friend-liness	Social integra-tion
Brazil	-0,85	-1,24	1,36	0,02	-2,74	-0,85	-0,42	-2,12	-0,60
	35	40	4	20	42	31	35	43	34

Indicated are the z values (top line) and rank places (bottom line) of the country for the examined performance criteria.

In terms of aftercare spending of the welfare state, Brazil is on place 22 among the 43 countries considered. But Brazil, along with South Africa, has the largest

income inequality among the 43 countries considered. The unequal distribution of land and income has not yet markedly reduced by the center-left governments (from 2003 to 2016). Because Brazil is also one of the last five with regard to its high proportion of risk-readers in the sense of PISA, it ranges in the overall index of the equality of participation in education and income on the penultimate place (only followed by South Africa). In terms of total educational spending, Brazil ranks 22nd among the 43 countries considered. Brazil ranges among the last five in terms of both average reading competency according to PISA and of the proportion of top readers. In the objective capability of the population to autonomy Brazil also counts to the last five of the 43 countries considered. Taking into account the satisfaction of the population with the freedom of choice of the way of life, Brazil belongs to the last third of the countries considered in the overall index of objective and subjective autonomy.

Figure 10-1: The performance profile of Brazil



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

In Brazil, there is a strong influence of the Catholic Church, over two thirds of the population are Catholic. Gender roles are correspondingly traditional and women, especially in parliament (rank 42 among the 43 countries considered), are very poorly represented. The proportion of female students shows an improvement. However, in the women's employment quotient and also in the overall index of women-friendliness Brazil belongs to the last ten of the countries considered. With regard to the admission of migrants, Brazil ranges on place 42 among the 43 countries considered, only followed by China. Brazil belongs to the last ten in terms of the participation of the (few) migrants in the education system. In the overall index of migrant-friendliness, Brazil ranges at the very end of the countries considered.

As to the integration into personal networks, Brazil is roughly in the international average. With regard to the integration in civil society, it ranges in the last third. Due to the economic crisis 2014-2016, Brazil has got worse in its economic integration and now belongs to the last third. In the overall index of

social integration, Brazil then also belongs to the last third of the 43 countries considered.

11. Case study on South Africa

Type and development trend

Because of the thin social safety net, informal networks play a major role in social security ("informal security regime") and there is also a large informal sector in the economy.

South Africa has set itself the task of giving special consideration to certain socially disadvantaged groups in the welfare sector, showing a good approach to social redistribution and greater social equality. In particular, old-age pensions and child benefits (CSG) represent a large proportion of the income of poor households. Nevertheless, 30 % of the very poor and 40 % of poor households are not matched by the measures, namely if there are no children or pensioners in the households.

In education and health, there are large differences in quality between the public and private sectors. Since more than 10 % of the population is HIV-positive, inadequate health care has particularly fatal implications.

Despite government redistribution efforts since the end of apartheid, there are still huge social differences in the population. The thin network of social services on the part of the state has so far failed to bridge them. Income inequality is still the highest among all 43 countries considered, poverty and crime are widespread.

The performance profile of South Africa

In the following, an attempt is made to explain the performance of South Africa (see table 11-1), in part by the welfare logic, by the guiding principles of policies, and by the corresponding institutions.

The welfare logic of South Africa is dominated by the goal of overcoming social differences as the heir to apartheid with the greatest income inequality in all 43 countries and with a large share of the population living in absolute poverty, especially in rural areas. However, because social security systems are not yet adequately resourced, the majority of the population is directed to achieving their social security through personal networks ("informal security regime").

In view of investments in research and development, South Africa ranges overall among the last five, as to the output of these investments in terms of the spread of internet use and important patents as well. In the overall index of innovation capacity, South Africa is in the third to last place (India is in last place). Accordingly, it ranges second to last in terms of average prosperity, followed

only by India. The ecological burden is in the international average, but South Africa ranges second to last in terms of relief efforts, followed only by Russia, and both range at the very end with regard to energy efficiency, probably because resources are so abundant. In the overall index of ecological sustainability, South Africa then ranges among the last ten of the 43 countries considered.

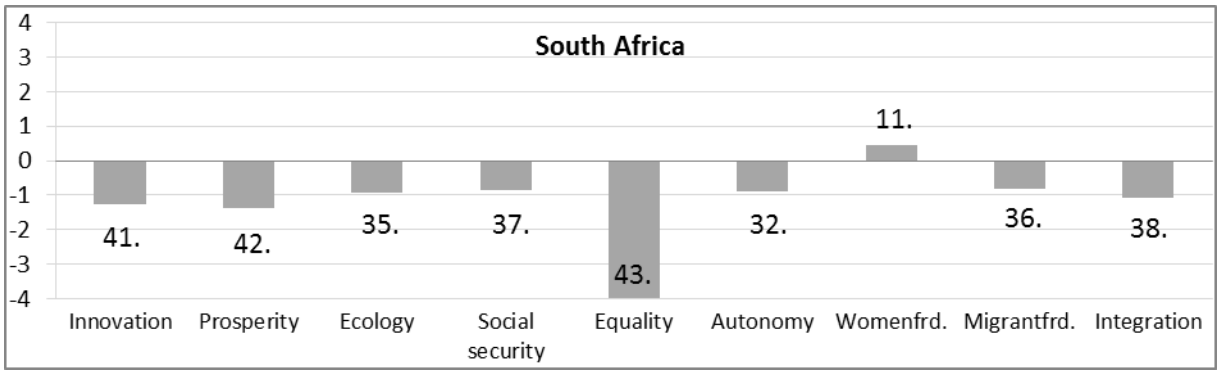
Table 11-1: The performance profile of South Africa

Country	Innovation	Prosperity	Ecological sustainability	Social security	Equality of participation	Autonomy	Women friendliness	Migrant-friendliness	Social integration
South Africa	-1,25	-1,36	-0,91	-0,86	-3,98	-0,89	0,45	-0,82	-1,08
	41	42	35	37	43	32	11	36	38

Indicated are the z values (top line) and rank places (bottom line) of the country for the examined performance criteria.

South Africa is third to last in the welfare state's aftercare spending and only followed by China and India. Accordingly, South Africa has the largest income inequality among all 43 countries considered. With regard to total educational spending, South Africa is roughly in the international average. In tertiary education however, South Africa ranges on place 41 among 42 countries (followed only by China).

Figure 11-1: The performance profile of South Africa



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

Women are well represented in the parliament and among students, but in the women's employment quotient and in women's income quotient, South Africa belongs to the last third each. With regard to women-friendliness, a heterogene-

ous picture results for South Africa. In terms of openness for migrants, South Africa is in the last third, with regard to the participation of the migrants in the education system and on the labour market, no information is available in the relevant surveys. The information base on this problem area is too limited for further statements. – However, hostilities against immigrants from the rest of Africa have escalated already several times, in the context of great inequality, poverty and crime.

With regard to the integration into the employment system and into the labour market, South Africa ranges overall at the bottom of the 43 countries considered. Integration in civil society is above average. As to the integration into personal networks, South Africa belongs to the last third; and this also applies to the overall index of social integration.

12. Case studies on Asia: China and India

With over one billion people each, China and India are the most populous countries on earth. With their high economic growth rates, both countries are now among the climbers in the global economic system. But their developmental path differs in many respects.

China has the character of a development dictatorship in which the Communist Party, with five-year plans, promotes an orderly modernization of the country towards high competitiveness on the world market, which was initially based on low labour costs. Through a deliberate undervaluation of its own currency, China is promoting its exports and has now become world champion of exports before the USA and Germany. China has been the second largest economy in the world since 2010, behind the US and before Japan. Despite communist-egalitarian ideology, social inequality has grown enormously in China. The regional disparities between prospering industrial cities and backward agriculture have not yet been addressed. The social security systems are rudimentary and remain behind the economic development. But the economic success of dynamic Chinese industrial enterprises could form the basis for a further expansion of the social security systems.

India is back in economic development behind China. While China, according to its average prosperity, is already among the midfield of the countries in the world, India is still one of the last 30 %. About 60 % of the population live in absolute poverty with less than USD 3,10 per day (see World Bank 2017 for 2011). The social security systems are only rudimentary and often only a program. On the other hand, India is the most populous democracy in the world and has a free press. The mechanisms of free political elections and critical reporting provide the means to demand the further development of social security systems. The economic success of Indian high-tech service providers could facilitate such a development.

12.1 Case study on China

Type and development trend

The role of the state is residual in the welfare production outside the protected urban government. Traditionally, the creation of social justice is not a primary goal of Chinese social policy. Their task is rather to secure political stability. The economic inequality was considered necessary for increasing effectiveness. In recent years, a rethinking with regard to the social security systems has been taking place. However, e.g. in the health sector, the private share of total health expenditures is clearly above the international average.

Since the economic dynamism results in a strongly increasing inequality, in particular between city and countryside, this big difference in the economic and social supply leads to a tension between city and countryside, in the face of the communist-egalitarian ideology. The expansion of social policy is the obvious way of dealing with these tensions.

According to the government plans, in the current phase the harmony between the social groups, the harmony with the natural environment as well as between economic and social development goals shall be taken into account more strongly (see Lin 2009).

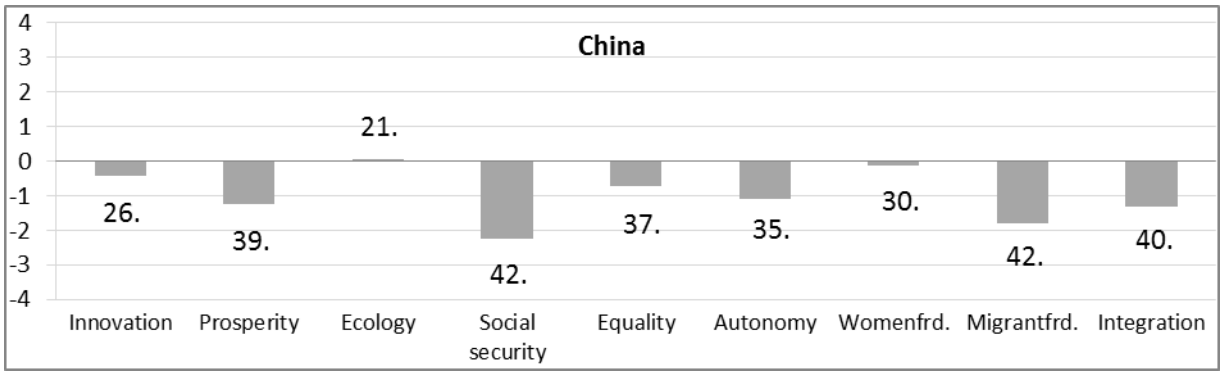
The current government under Xi Jingping regards as the central challenges the widespread corruption and the growing social inequality between the wealthy in the big cities and the migrant workers as well as the whole population of the countryside, furthermore the air pollution and the environmental burden generally.

The performance profile of China

China has improved its investment in research and development and now belongs to the first third of the 43 countries considered. China, however, ranges among the last ten in the output of these investments, because the use of the internet in the countryside is still relatively low, while China is among the lower midfield as to the important patents. This puts China in the lower midfield also with regard to the overall index of innovation. In terms of average prosperity, China has risen to rank 39 of the 43 countries. With the highest growth rate of all countries considered, China is experiencing a marked economic rise. With its huge population, China has the largest gross domestic product after the USA and before Japan. That is, China is an economic world power. China also holds the largest financial reserves, which is a major power factor in the current state debt crisis. As a downside of the relatively low prosperity, the environmental impacts are also relatively low *on average* (*especially because of the large population in the countryside*). However, air pollution in the large cities and the pollutant load in the vicinity of the production sites is very high, the use of protective masks is widespread. The relief efforts of China are only among the last five. The overall

index of ecological sustainability corresponds thus to the international average. In this per capita view, it must be borne in mind that any improvement in the level is, of course, of great importance in view of the population size.

Figure 12-1: The performance profile of China



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

With regard to aftercare social spending, China ranges at the penultimate place of the 43 countries considered (followed only by India). With its high income inequality, China ranks among the last five. In view of the Communist-egalitarian ideology, this actually holds a great conflict potential. But a high proportion of inequality is due to spatial disparities between wealthy cities and poor rural regions. For this distribution conflict, therefore, one cannot mobilize so easily. However, an expansion of social security systems would increase economic and social stability. There is too little information on the education system. – The proportion of total education spending in GDP is ranked 41,5 among the 43 countries observed. That is, the overall expenditure on education is very low. The share of tertiary degrees is also very low. But in the PISA examinations on average reading competency in 2015, the former British colony of Hong Kong performs very well, the former Portuguese colony Macao ranks also above the average of the countries of the PISA study. The high appreciation of education in the Chinese tradition and the great competitive pressure in the school system with very low social inheritance lead to good performance results. However, PISA evaluations are not available for the whole country of China.

In the representation of women in parliament, China is in the lower midfield, the proportion of female students is worse, while the employment quotient as well as the income quotient are better. In the overall index of women's friendliness, China ranks roughly in the lower midfield. – China ranges at the end of the 43 countries considered with regard to the admission of migrants. But in the PISA examinations in 2015, the former British colony of Hong Kong performs very well in average reading competency, the former Portuguese colony Macao ranks

also above the average of the countries of the PISA study. For a closer look at this issue, a better reporting of China would be needed for the whole country.

China is among the top five in terms of the integration into the labour market. But with regard to the integration in civil society and the integration into personal networks, China ranks in each among the last five. Also in the overall index of social integration, China belongs to the last five of the 43 countries considered.

12.2 Case study on India

Type and development trend

In India, 21 % of the population live with less than USD 1,90 per day in strict absolute poverty and 58 % of the population in absolute poverty with less than USD 3,10 per day (see World Bank 2017 for 2011). At the same time, there are the world's most billionaires and millionaires in India.

Over the last decade, the government has recognized the pressing problems of social security and has tried to steer it with some measures. However, it is clear that the attempts to date are not sufficient and a comprehensive redesign of the social security systems is necessary.

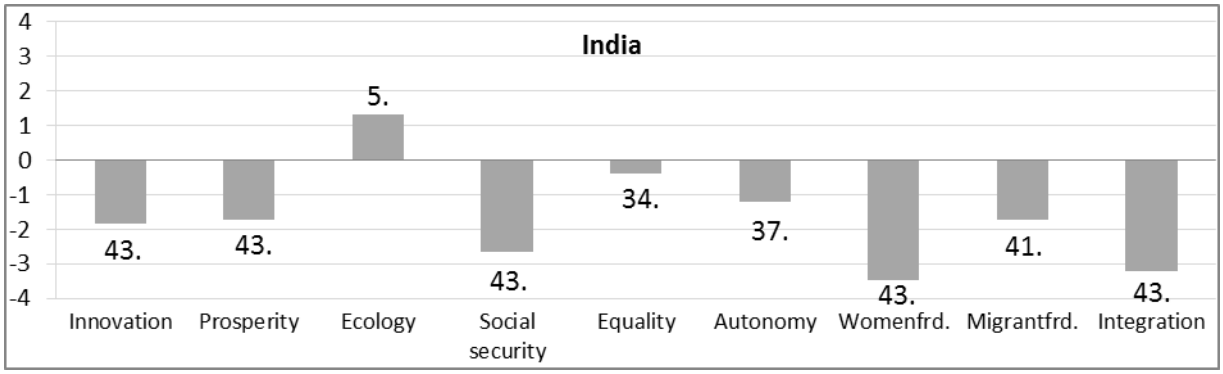
Altogether, India can be classified as informal security regime, i.e. the private networks still play a central role for social security. The actual implementation of social protection programs and the successes need to be increased. The new Hindu nationalist government (since 2014) is at first focusing its priority on economic growth.

The performance profile of India

In terms of private spending on research and development, India is among the last five. In the spread of internet use as well as in the overall index of innovation capacity, India ranges at the very end of the 43 countries. India's average prosperity is also on the last place among the 43 countries considered, and belongs to the last 30 % of the world's countries. With its population of over one billion people, however, India has the seventh-largest GDP of all countries in the world after the USA, China, Japan, Germany, Great Britain and France (see IMF for 2016). India also has the second highest growth rate behind China among the 43 countries considered. India possesses strong enterprises in information technology. Overall, India is an emerging economic world power despite its low standard of living. According to the lowest prosperity, India has by far the least impact on the environmental burden from all countries considered. With regard to the relief efforts, India ranges at the beginning of the last third. With this, India reaches the fifth place in the overall index of environmental sustainability.

With regard to aftercare social spending, India ranges at the very end of the 43 countries considered (behind China). With its large income inequality, India ranks among the last ten. This is structured in particular by city-countryside disparities as well as differences by castes and strata. With regard to public and private education spending, India belongs to the last three of the 43 countries considered. Overall, India has a high need for reform in education and social protection systems.

Figure 12-2: The performance profile of India



Indicated are the z values and rank places relative to the 43 considered countries for the examined performance criteria.

India has extremely traditional gender roles. India belongs to the last five with regard to the representation of women in parliament and among students. At the employment quotient and at the income quotient, India is on the last place. With regard to the overall index of women-friendliness India ranges at the very end of the 43 countries considered. In this area, India has an urgent need for reform. With regard to the admission of migrants, India ranges at the end (followed only by Brazil and China). Apart from that, there is not enough official information available on migrant-friendliness.

In view of the integration into paid employment, India is among the last five of the 43 countries considered. The integration in civil society is roughly in the international average. With regard to personal support networks, India is on the last place. According to the very limited information base, India ranges at the very end in the overall index of social integration.

In addition to its successful high-tech enterprises, the positive potential of India lies in the mechanisms of the free press and of the political elections in the most populous democracy in the world. As a result, the necessary reforms in education and social protection systems could be gradually demanded and realized over time.

12.3 Performance of China and India

With regard to the proportion of private and public investments in research and development, China now belongs to the first third, but with the results of these investments it counts to the last third. In the overall index of innovation capacity, China is thus in the lower midfield. India ranges behind China as to the most important patents and with regard to the dissemination of internet use even at the very end of the 43 countries considered. The latter also applies to the overall index of innovation capacity. In the average standard of living, China is now in the midfield of the world, whereas India is among the last 30 % of the world's countries. Due to its strong growth, China is now ahead of Brazil, Serbia, South Africa and (at the very end) of India. India achieves less than half of the average prosperity of China.

According to relatively low prosperity, India and China, with their low levels of garbage pollution, are at the top of the list and rank on the first and second place in terms of environmental burden. In the case of renewable energies, India belongs to the best third, while in the whole relief efforts China ranks ten places behind India. With regard to the overall index of environmental sustainability, India is thus in fifth place, while China ranges only in the international average.

Table 12-1: Performance profiles of China and India

Country	Inno-vation	Pro-sperity	Eco-logical sustain-ability	Social security	Equality of partici-pation	Auto-nomy	Wo-men-friend-liness	Mig-rant-friend-liness	Social integra-tion
China	-0,43	-1,23	0,04	-2,25	-0,72	-1,08	-0,13	-1,79	-1,30
	26	39	21	42	37	35	30	42	40
India	-1,84	-1,73	1,33	-2,65	-0,38	-1,21	-3,48	-1,73	-3,20
	43	43	5	43	34	37	43	41	43

Indicated are the z values (top line) and rank places (bottom line) of the countries for the examined performance criteria.

China and India are jointly at the end of the 43 countries as to the aftercare social expenditures. China has a slightly greater income inequality than India, both of which, with their great inequality, are among the last ten of the 43 countries considered. In terms of public and private expenditures on education, China and India are jointly ranked among the last five, which means that the objective capability for autonomy is little promoted.

As to the participation of women in education, China ranges in the last third, as to the participation in employment in the first third. China is thus in the lower midfield in the overall index of women's friendliness. India is one of the last five in the participation of women in parliament as well as in education, while India

is ranked at the very end as to the employment quotient and as to the income quotient. That is why India also ranges on the last place with regard to the overall index of the women-friendliness.

In view of the admission of migrants, India is one of the last five and China ranks at the very end of the 43 countries considered. For statements on the participation of the (few) migrants a better reporting of China and India would be necessary.

The integration into the official labour market succeeds much better in China than in India. As to the participation in civil society, on the other hand, China ranges at the very end. In the overall index of social integration, China and India are among the last five of the 43 countries considered.

Altogether, it is obvious that China and India are emerging economic world powers, but, according to the societally desirable goals, China and India range far behind the models of good living in the developed welfare regimes of Scandinavia, Central Europe and the Anglo-Saxon countries.

13. A system of societal observation of the wealth and welfare of nations

I think that the approach of welfare regimes, in which the logic of the production and distribution of welfare is examined, is particularly suited to partially explain the welfare of nations. On the other hand, the individual countries, at the same time, show differences and independent profiles with respect to the societally desirable goals and the quality of the living conditions in the analyzed dimensions, as just shown.

The best reform program would be to organize social development as a learning process. In expansion respectively systematization of the Human Development Report of the United Nations, which takes into account as many nations as possible, but is in part limited to relatively crude indicators for developed countries, the measurement and the comparison of the welfare of nations should be extended to such a broad list of societally desirable goals and quality criteria, as I have suggested here for a system of continuous societal observation, which should, of course, be further de-veloped in a learning process itself.

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