

14. Methodologies for comparative social policy analysis

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INTRODUCTION

This chapter reviews and takes stock of the research effort and the methodology employed in comparative social policy analysis reported in the *Journal of European Social Policy* (JESP). We trace the evolution and development of comparative methodology, empirically analysing trends in JESP since the first issue was published in February 1991, while situating comparative analysis within the broader theoretical trends and European social policy debates. We focus on methods and substance, looking at how major techniques and approaches have been applied in comparative social policy over time. The key questions driving our analysis are: What is the scholarly use of comparative methods in social policy over the last three decades? How has the comparative methodology helped us to better understand the role, nature, and outcomes of European social policy? Where is comparative methodology heading for the future? JESP is the leading European journal in the field of social policy (with close ties to ESPAnet), and is therefore well suited for such an empirical review of comparative methodologies for social policy analysis.

The purpose of this chapter is to highlight and focus on the main trends in the use of the comparative method, using comparative research articles published in JESP to guide us. The first part sets the scene; it does so by providing an outline of the comparative turn in social policy research, and defines what we mean by the comparative method. For the literature review we have developed a Comparative Journals Database of research articles that includes the work published in JESP, from which data for JESP are extracted to support our analysis set out below. Here we examine how the comparative method has been used in the pages of JESP before going on to consider how the comparative methods helps us to better understand the role, nature, and outcomes of European social policy. We include a qualitative analysis of the comparative articles, and then focus on the methodological characteristics of the most cited

comparative articles – the ‘greatest hits’ of JESP. We conclude by highlighting potential future trends on the basis of our analysis.

THE COMPARATIVE TURN

We find that interest in comparative analysis has grown in the social sciences, with the appearance of new outlets and books, as well as the increasing number of courses designed to equip students with the theoretical, analytical, and methodological tools necessary to engage in comparative analysis. By comparative methodology we refer to a general system of thinking – methodology is ‘thinking about thinking’; while the term comparative methods indicates different techniques and approaches that have been developed in the social sciences over the last half century (on the distinction between ‘methodology’ and ‘methods’, see Sartori, 1970).

The use of the comparative method has been at the centre stage of social policy analysis. One can perhaps indicate some of the foundational texts that have contributed massively to the expansionary trend in the use of the comparative method in our discipline, for example, Harold Wilensky’s (1975) *The Welfare State and Equality* and Gøsta Esping-Andersen’s (1990) *The Three Worlds of Welfare Capitalism*. Inspired by the philosophical and epistemological reflection of John Stuart Mill, scholars have refined the use of comparative method (Moore, 1966; Sartori, 1970; Lijphart, 1971; Smelser, 1976; Skocpol, 1979; Ragin, 1987; Collier, 1993) with historical and case-based approaches, and the growing application and development of qualitative and quantitative techniques (see, for example, the pioneering work of Almond and Verba, 1963).

A major comparative turn is certainly associated with Esping-Andersen’s seminal work. In *The Three Worlds of Welfare Capitalism*, Esping-Andersen attempted to link a specific type of institutional arrangement to specific political determinants on the one hand, as well as to particular social impacts and outcomes on the other. Adopting a (comparative) political economy perspective, he devised indices for the 18 nations included in his study relating to some of the core principles and functions of the welfare state relating to social citizenship rights. For example, he constructed a decommodification index derived from data on pensions, sickness, and unemployment benefits, stratification, and the public-private mix of welfare provision represented by the distinctive configuration of market, state, and family. The welfare state is the principal institution in the construction of different models of post-war capitalism. Infamously, he argued that the world is composed of three qualitatively different welfare state logics associated with different political movements of the twentieth century: liberalism, conservatism, and socialism.

It is not a coincidence that JESP launched in 1991. While one cannot imply a causal relationship between the work of Esping-Andersen and its arrival, it is certainly possible to conclude that social policy as a discipline or field of study definitely turned more comparative in the 1990s. *The Three Worlds of Welfare Capitalism* and the birth of JESP are representative of this comparative *zeitgeist*. There are, of course, many other influential articles in JESP discussing and reviewing the seminal work of the Danish scholar (in 2015, a whole issue in JESP was dedicated to this task, Vol. 25, No. 1; see also Ferragina & Seeleib-Kaiser, 2011; Deeming, 2017).

DEFINING THE COMPARATIVE METHOD

Thinking without comparing is a Sisyphean task. To a large extent, every intellectual enquiry demands some form of comparison. Even the analysis of natural phenomena usually includes implicit or explicit forms of comparison. The construction of a measurement scale, for example, has to take into account the existence of specific ideal types and/or prototypes (e.g., the absolute range of possible values assumed by the variables under scrutiny). Despite the inherently comparative nature of scientific enquiry, Ragin (2014) pointed to the fact that, while all research methods are comparative in a broad sense, in the social sciences, the idea of comparative research is mostly used to refer to research involving the use of large macrosocial units. Ragin's definition has proved influential in comparative social enquiry.

It is not universally accepted, however. Other scholars in the past proposed different boundaries to delimit the domain of comparative social inquiry. On the one hand, those more geared towards the use of quantitative and multivariate techniques have defined the comparative method simply by considering studies which include comparative data from different societies (see Andreski, 1965; Armer, 1973) or, even more restrictively, they have only included within this category the works based on multiple levels of analysis (see Rokkan, 1966; Przeworski & Teune, 1970). On the other hand, scholars more versed in qualitative/historical analysis, such as Moore (1966) and Skocpol (1979), have counterposed with the case-oriented and the variable-oriented comparative method (such thinking is directly derived from the founding fathers of sociology and political sciences: Tocqueville, Durkheim, and Weber).

These views are too restrictive, and for this reason, we choose to follow Ragin defining the comparative method on the basis of its goals rather than specific methodological orientations. The analysis of macrosocial units is a 'meta-theoretical category', which basically distinguishes comparative social scientists from the others, because they use 'macrosocial units in explanatory statements' (Ragin, 2014: 5). Indeed, the vast majority of scholars working in the field, and the studies reported in JESP, often do not explicitly define the

nature and the role of the macrosocial units, but rather use them implicitly as ‘observation’ and/or ‘explanatory’ units of analysis (Ragin, 2014: 8).

Comparative social inquiry is a quintessential locus to analyse significant methodological issues for at least two reasons. First, the split between quantitative and qualitative analysis has a long tradition that is evident in JESP. This is mainly because the existence of a vital qualitative tradition has not been completely superseded by the development of increasingly advanced quantitative techniques, evident in JESP. Second, the challenging nature of the task to compare relatively dissimilar macrosocial units has accrued the interaction between theory and practice. As clearly highlighted by Sartori (1970), the constant variation in the level of abstraction and analysis used by researchers in comparative work signals the complexity of the comparative social enquiry endeavour.

THE COMPARATIVE JOURNALS DATABASE

The work presented here forms part of a larger research project and review of comparative method in the social sciences. For our project we have created an original database – the Comparative Journals Database – that allows us to quantitatively and qualitatively map the use of comparative method in research articles published in leading social policy, sociology, and political science journals. The data presented here focus on JESP for the period 1991–2015.

Much of the review involved hand searching, which is a manual method of scanning the selected journals, each issue from cover to cover, page by page. Each article in the database was sorted, reviewed manually, and cross-checked in order to identify and separate the comparative articles from the non-comparative contributions. Relevant details were extracted from the comparative articles only. Along with basic bibliographic information, including the DOI, year of publication, authors, journal, and discipline, we coded methods into seven categories: (1) descriptive statistics only (i.e., no use of formal methods beside simple descriptive statistics); (2) case studies and comparative historical analysis; (3) qualitative comparative analysis/fuzzy-sets; (4) regression techniques; (5) structural equation modelling and factorial analyses; (6) cluster analysis; and (7) other techniques. The other techniques category includes methodologies that are used infrequently, such as diagonal reference models, sequence analysis, scale construction, thematic analysis, propensity score matching, optimal matching, Krippendorff’s Alpha, and event history. Moreover, we included the number of methods used, the main macrogeographical unit of analysis (state, lower institutional entity, historical institutional entity), and the number of macrounits considered in the analysis. Finally, in the case of cross-national research, we also collected country-level details.

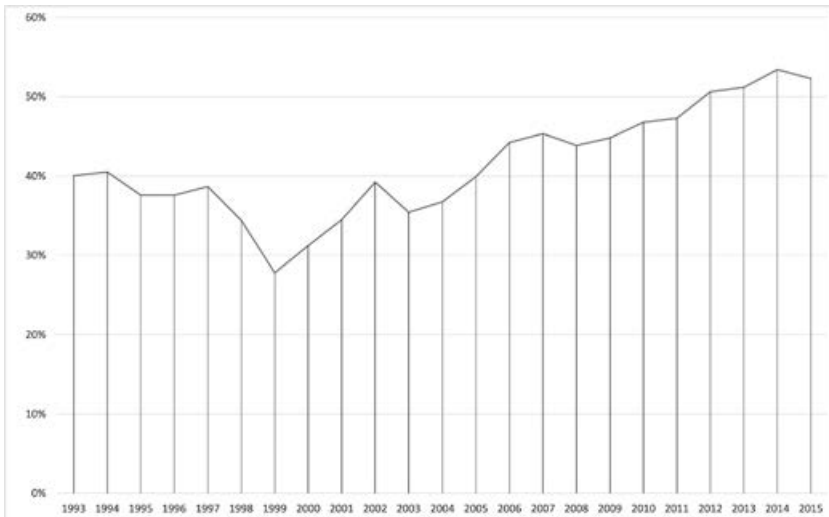
The coding process was run in four steps over a 36-month period:

1. We calibrated the measurement by coding a random sample of 50 articles from each journal. Each article was coded by the two authors and three research assistants.
2. We then discussed the results, identifying any inconsistencies according to our definition of comparative method.
3. The three research assistants then coded all the articles in the entire database.
4. Finally, a sample comprising 50 articles was then independently coded and checked by the two authors to ensure reliability.

We are also interested in the relative importance of top-cited articles in the database. For this reason, we employed as a proxy measure the number of citation counts extracted from Google Scholar (on 18 July 2019). Google Scholar has a number of distinct advantages, it is freely available and we were able to extract all of the citation data relating to the DOI records over a one-day period, a ‘snap-shot’ in time in a highly dynamic environment. We developed a search command written in R to capture the citation counts associated with each record contained in the database. Thanks to this device, all the database records were carefully checked, missing citation entries were entered manually, and any errors were corrected. The top-cited comparative articles in JESP (and elsewhere) were extracted using this citation count.

ANALYSING THE USE OF THE COMPARATIVE METHOD IN JESP

JESP has been a highly comparative journal from the outset, with the first issue appearing in 1991. While most other journals in the social sciences present a minority of comparative articles, JESP has consistently published a large number of comparative articles. This trend has been continuous (with the exception of a drop in the period 1998–1999), rising from 40 per cent of all articles in 1993 to more than 50 per cent of all articles since 2012 (Figure 14.1). The strong start and steady growth may not surprise as JESP set out with the objective to provide a focus on comparative analysis in Europe, as noted in the first issue: ‘The Journal will therefore give priority to articles on social policy that deal with comparative developments within Europe’ (Editorial foreword, 1991: 1). Since 1991, the journal has clearly pioneered new ways of doing social policy – more comparative and progressively geared towards empirical analysis.



Note: Comparative research articles published in JESP as a percentage of the total articles published in JESP, showing the three-year moving average.

Source: Comparative Journals Database, 1970–2015.

Figure 14.1 Comparative research publishing trends in JESP articles

Moving on to the use of methods, here we observe some interesting features and trends. New data initiatives and the creation of several databases allowed scholars to progressively broaden the variety of techniques employed in comparative analysis from those traditionally embraced, i.e., case-based method, comparative historical analysis, and simple correlations, towards more sophisticated regression techniques and the growing influence of multilevel modelling across the social sciences with large-N. So, for example, comparativists expanded:

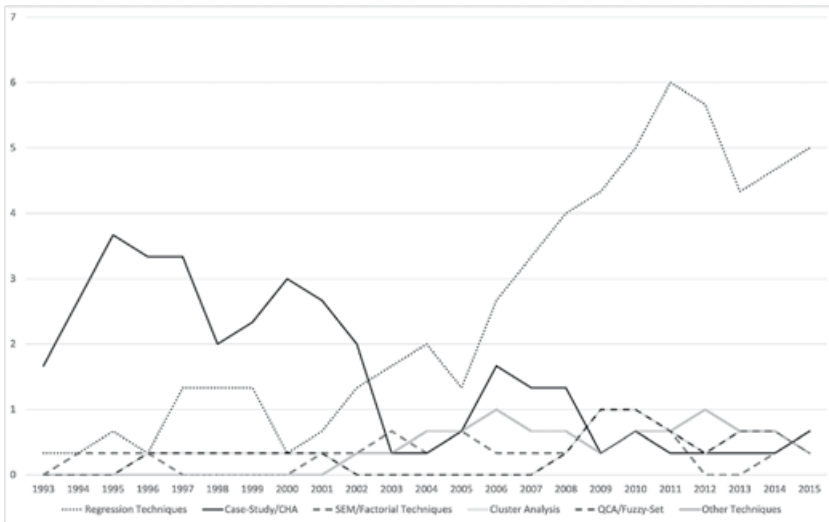
- Their capacity to formulate theoretically driven taxonomies with different clustering techniques (i.e., K-Means, hierarchical clustering, principal component analysis, multiple correspondence analysis, latent class analysis), going beyond the use of descriptive statics proposed in comparative social policy by the seminal work of Esping-Andersen (1990).
- The case-based method, combining ‘quality and quantity’ with the development of qualitative comparative analysis and the fuzzy-set qualitative analysis.
- The potential of regressions, using more systematically time and space with pooled time series cross-section analysis and hierarchical or multilevel modelling since the 1980s. Moreover, major investment in panel

surveys helped to capture important family dynamics and life-course events and transitions (understood with panel regressions).

- Their ability to take advantage of ‘natural experiments’ and harness ‘big data’, as well as formalizing the use of mixed methods in a more systematic way.

Figure 14.2 shows that comparative researchers embraced all these methods, but the use of regression techniques has steadily become dominant, particularly during the 2000s, and has progressively superseded the initial prevalence of the case study approach. This is an important trend that now seems stable, an interesting feature in the literature. This trend links to two other important trends that we observe in JESP. Firstly, the fact that articles employing at least one formal method have progressively become more numerous than those relying on descriptive statistics only (Figure 14.3), and secondly, large-N analysis has increased exponentially and is now dominant in JESP, accompanying the rise in regression techniques and formal quantitative methods (Figure 14.4). The influential work by Wim van Oorschot is illustrative of this trend, especially his work on public perceptions of the relative deservingness of welfare beneficiaries, drawing on data from the European Values Study (EVS) wave 1999/2000 for 23 European countries (van Oorschot, 2006); also, the test of the crowding-out effect of the welfare state on people’s trust and social capital more generally, again drawing on the data from the EVS wave 1999/2000 for 23 European countries (van Oorschot & Arts, 2005).

Put simply, while in the 1990s the typical comparative article published in JESP was descriptive and mostly based on a case study approach, since the early 2000s, the increasing tendency has been to publish articles based on large-N and the use of regression analysis. Quantitative trend statistics and charts do not tell the whole story, however, and need to be supported by a more qualitative ‘outlook’. If we now turn to the influence or impact of the original articles published in JESP, we observe that the four most cited articles – and eight in the top ten — are based on case studies and descriptive statistics, while only two are based on regression analysis (shown in Table 14.1). This is certainly an effect of time – older articles can carry more citations perhaps – but also a reminder that methodological sophistication is not a guarantee of influence in the comparative social policy field. The depth of small-N comparative case study scholarship has certainly been illuminating and has stood the test of time, illustrated by the works of Lewis (1992), Ferrera (1996), and Bettio et al. (2006). Then there are influential comparative studies that are rich in description. Anttonen and Sipilä (1996) consider social care service arrangements in 14 European countries, while Pavolini and Ranci (2008) consider long-term care provision in six European countries.



Note: Total number of published comparative articles, showing the three-year moving average.
 Source: Comparative Journals Database, 1970–2015.

Figure 14.2 The use of comparative method in JESP articles



Note: Number of published comparative research articles published in JESP using mixed and multimethods in JESP, three-year moving average.
 Source: Comparative Journals Database, 1970–2015.

Figure 14.3 Trends in the use of mixed and multimethods in JESP



Note: N-size trends over time in JESP, three-year moving average.

Source: Comparative Journals Database, 1970–2015.

Figure 14.4 Number of comparative units of analysis in JESP research designs

An important dichotomy exists in the field between comparative research primarily geared towards establishing causation and studies that seek to provide a parsimonious or more accurate description of social phenomena. Of course, establishing causation and providing better descriptions of social reality can go hand in hand. In JESP during 1991–2015, we find that 69 research articles explicitly mention the issue of causality. Few, however, really deal with causality and welfare development in any detail (cf. Ganghof, 2006). Recently, despite the strong preference for causation in mainstream academic journals, a renewed interest for ‘mere description’ is gaining ground (for an excellent discussion of this point see Gerring, 2012). In this respect, the great success of Esping-Andersen’s (1990) *The Three Worlds of Welfare Capitalism* is also grounded in the capacity to provide a taxonomy based at the same time on an established macropolitical economy framework and the use of a specific set of indicators, measuring ‘decommodification’ and ‘social stratification’ and the public-private mix of welfare.

Table 14.1 Most cited comparative studies published in JESP

Rank	Authors	Year	Citations	Unit of analysis	Number of units	Methods	EA*
1	Ferrera	1996	3,738	Nations	4	Case study, descriptive statistics	Yes [1990]
2	Lewis	1992	3,098	Nations	4	Case study, descriptive statistics	Yes [1990]
3	Anttonen & Sipilä	1996	945	Nations	14	Descriptive statistics/correlation techniques	Yes [1990]
4	Gorniek et al.	1997	816	Nations	14	Descriptive statistics	Yes [1990]
5	van Oorschot	2006	745	Nations	23	Regression techniques	Yes [1996]
6	Bettio et al.	2006	728	Nations	4	Case study, descriptive statistics	Yes [1990]
7	Albertini et al.	2007	593	Nations	10	Regression techniques	Yes [1990]
8	Scruggs & Allan	2006	545	Nations	18	Descriptive statistics	Yes [1990]
9	Castles	2003	543	Nations	21	Descriptive statistics/correlation techniques	Yes [1996, 1999]
10	Deacon	2000	540	Nations	8	Descriptive statistics	No
11	van Oorschot & Arts	2005	503	Nations	23	Regression techniques, factor analysis	Yes [1999]
12	Pavolini & Ranci	2008	426	Nations	6	Descriptive statistics	Yes [1999]
13	Alber	1995	395	Nations	3/12**	Case study, descriptive statistics	Yes [1990]
14	Sainsbury	2006	361	Nations	3	Case study, descriptive statistics, social indicators	Yes [1990, 1999]
15	Aassve et al.	2002	336	Nations	10	Regression techniques	Yes [1999]

Note: Measured using Google Scholar on 18 July 2019. * EA: Esping-Andersen (1990) is cited in the work. We also added to the column when Esping-Andersen (1996) and/or (1999) is cited. ** Here the main focus is on explaining the different levels of social service supply in Germany, Denmark, and the Netherlands, within the wider context of other European nations.

COMPARATIVE METHOD AND EUROPEAN SOCIAL POLICY

In this section, we briefly consider how comparative methodology has helped to provide a better understanding of the role, nature, and outcomes of European social policy. Much of the comparative research effort in JESP emerges out of the interaction of national European societies and the study of European political development – ‘social Europe’ – in the context of changing social policy paradigms and methodological innovations (Room, 2008).

Clearly, the concept or lens of the welfare ‘regime’ associated with the work of Esping-Andersen (1990, 1999) has been influential for critically engaging with – and for understanding – regional, temporal, and cross-national diversity, trends, and outcomes in European social policy. The highly influential works of Jane Lewis (1992) and Maurizio Ferrera (1996) show how the debate about welfare regimes opened by Esping-Andersen was expanded and fostered in JESP, adding gender roles and institutional and geographical breadth – Southern Europe (Ferrera, 1996) and Eastern Europe (Deacon, 2000) – to the original welfare regime classification.

Anttonen and Sipilä (1996), in another influential work, question whether the inclusion of social services decisively changes the results of comparative social policy research, and more specifically the welfare state regimes proposed by Esping-Andersen. Further influential comparative work on social service models and care regimes in Europe is expanded on by Anttonen and Sipilä (1996), Bettio et al. (2006), and Pavolini and Ranci (2008).

Gornick et al. (1997) examine the congruence of family policy with welfare regime theory, focusing on employment outcomes for mothers. Sainsbury (2006) focuses on immigrants’ social rights employing the welfare regimes framework, while family transfers and welfare regimes are considered by Albertini et al. (2007).

Alber (1995) provides an early rejection of Esping-Andersen’s regime approach in favour of Stein Rokkan’s comparative welfare state research scheme for thinking about church/state relations in the supply of social services and centre–periphery relations between various levels of government. Esping-Andersen’s regime theory had focused on ‘decommodification’ but ‘decommodification’ is less of an issue for children and elderly – two groups which are not yet or are no longer in the labour market, as Alber notes.

JESP continues to play a major role in the debate and diffusion of quantitative comparative analysis. At the outset, we might expect to see a strong growth in large-N studies, given major investment in the comparative welfare datasets over the period (e.g., Scruggs, 2004; Nelson, 2007; Huber et al., 2008; Korpi & Palme, 2008; Gauthier, 2011; Brady et al., 2014; Scruggs et al.,

2014), and also the cross-national social surveys (Jowell et al., 2007; Esmer & Pettersson 2012; Haller et al., 2012). JESP researchers have exploited the major investments in cross-national datasets, for example:

- Comparative Welfare Entitlements Dataset: Scruggs and Allan (2006) provided a reassessment of Esping-Andersen's decommodification index using these data on the comparative generosity of welfare state programme entitlements for the period 1971–2002.
- Comparative Family Policy Database: this database was used by Rovny (2014) to examine vulnerability to new social risks and the protective effects of social policies in 18 countries in the Organisation for Economic Co-operation and Development (OECD).
- Social Citizenship Indicator Program: these data were used by Danforth (2014) for his historical reassessment of the three-world typology, covering the original 18 nations in the period 1950 to 2000 for evidence of tripartite clustering.
- Social Assistance and Minimum Income Protection Interim Data-Set: these were used by Nelson (2012) to examine the link between social assistance benefit levels and material deprivation in 26 European countries.

Data and findings from the major cross-national social surveys have been extensively used to guide our understanding of comparative and European social policy reported in JESP, notably, for example:

- European Social Survey (ESS): the ESS data have been used to explore the popular legitimacy of health-care systems in 24 European countries (Missinne et al., 2013), as well as relations between labour market policy and subjective wellbeing in 21 European countries (Wulfgramm, 2014).
- European Community Household Panel (ECHP): the ECHP was used to analyse the impact of employment and income on young people's decision making to leave the parental home in 10 European countries (Aassve et al., 2002).
- European Union Statistics on Income and Living Conditions (previously the ECHP): these data were used to examine at-risk-of-poverty rates for the working population in 26 European countries (Lohmann, 2011).
- Luxembourg Income Study (LIS): LIS data have been used to assess the effectiveness of means-tested benefit programmes in terms of poverty alleviation in Britain, Germany, and Sweden (Behrendt, 2000), while Hook (2015) used LIS and ESS data to examine how two-parent families combine work and care in 16 European countries.
- European Values Study (EVS): the EVS data were used by van Oorschot and Arts (2005) to consider whether or the extent to which the welfare state crowds out social capital (networks, trust, and norms) in 23 European

countries. Van Oorschot (2006) also used the EVS data to examine the public perceptions of the relative deservingness of needy groups (elderly people, sick and disabled people, unemployed people, and immigrants) in 23 European countries.

- International Social Survey Programme (ISSP): these data were used to examine gender role attitudes and family policy models (Sjöberg, 2004) and age-related differences in welfare state preferences in 14 OECD countries (Bussemeyer et al., 2009).

CONCLUSION: WHERE IS COMPARATIVE RESEARCH HEADING?

This chapter has shown the variety of techniques employed under the broad label of comparative method, and has documented the uses of comparative method within the pages of JESP. Despite recent trends towards mixed and multimethods, we note the existence of major methodological divides that have long characterized the field of comparative social inquiry – and are likely to do so in the future. One example is the distinction between case-oriented and variable-oriented studies, reflected in Table 14.1.

The existence of a dichotomy between case-oriented and variable-oriented studies underlines (more or less implicitly) a different orientation towards the use of the comparative method. In the first instance, the principal aim is the interpretation and understanding of the patterns of a few cases, while in the second, the scope is rather hypothesis testing and generalization. Broadly speaking, case-oriented analysis tends to assume the existence of a large causal complexity, presupposing, on the one hand, a very detailed knowledge of the cases analysed; and, on the other, variable-oriented studies start from simplified assumptions and use variables nested within macrosocial units to prove or disprove a theory or a causal nexus. It is important to note that this distinction is not perfect; at times case-oriented studies clearly seek to make powerful generalizations, such as understanding gender divisions and the development of welfare regimes (Lewis, 1992), rather than stay within the confines of the study sample and the interpretation of results for the specific cases under consideration (i.e., Moore, 1966). Both strategies have important limits and strengths that make them more or less suitable for certain research tasks. Clearly, in recent years the second kind of approach has become more preeminent, in JESP and in other social science journals. This is underpinned by the exponential growth of medium and large-N studies, employing regression techniques to analyse the growing number of cross-national datasets.

However, despite the prominence of these types of studies, in numerical terms, it is important to emphasize once again that at the qualitative level, the most cited articles from JESP are based on the case study approach that is asso-

ciated with deep description and analysis, often inspired by *The Three Worlds of Welfare Capitalism*. While scholarship seems to be geared more and more towards studies based on causation and more sophisticated techniques, the case study approach is foundational and continues to occupy a prominent place in the literature. However, it is near impossible to identify true causal effects with so few welfare states that can be compared. Despite the increasing volume of comparative studies in JESP attempting to identify what causes social policy divergence, and what effect this has in terms of outcomes. We really do not know the answers to either.

In the future, it is highly likely that an increased methodological sophistication and the larger availability of different kinds of data, including 'big data' and administrative data, will give way to comparative articles increasingly based on large-N, mixed, and multimethods, and perhaps a return to comparative inquiry to shed new light on causal mechanisms. However, case studies will probably continue to occupy a prominent place in the comparative social policy literature, since they are well suited to theoretical development and the understanding of policy change.

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