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Farnsworth, Kevin and Irving, Zoe Margaret (2024) Crises of the welfare state, resilience, and pessimism of the intellect. *Social Policy and Administration*. ISSN: 1467-9515

<https://doi.org/10.1111/spol.12996>

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Crises of the welfare state, resilience, and pessimism of the intellect

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Abstract

The crises faced by welfare states have now endured for significantly longer than the counter-period of stability, calm and cooperation between the 1940s and 1970s. Systemic crisis of welfare states tied to the contradictions of capitalism, and the exogenous crises for the welfare state that have afflicted its expansion have, however, been met by faith in its resilience evidenced in its economic functions and popularity. We question the basis for optimism by examining the ‘state of the welfare state’ in the context of the social goals envisaged in the 1940s and the extent to which these are evidenced in contemporary social policy arrangements. We present a case for more ‘pessimism of the intellect’ in assessing welfare futures to better underpin welfare state scholars’ tendency towards ‘optimism of the will’.

KEYWORDS

crisis of the welfare state, welfare state resilience

1 | INTRODUCTION

Since the 1960s, advanced welfare states have been exposed to various ‘crises’ which challenge their essence, purpose, sustainability, scope and affordability. These crises feature endogenous and exogenous challenges that have converged and combined at different points in different constellations, differentiated as the problems of the enduring contradictions of welfare capitalism (Offe, 1984) and the critical junctures that have emerged to signify a turning

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point in the established order. That the welfare state is under considerable strain today is unquestionable. During the last decade, the chronic background tensions found in ideational architecture, structural foundations, resourcing of existing social policies, related power struggles and environmental stability have been further exacerbated by acute episodes of financial crisis, austerity, the ascension of nationalism, a global pandemic and a war in Europe between states with significant roles in global food and energy supplies. These events crystallise and expose the distance over half a century of ideological corrosion, fiscal stress and socio-political malfunctioning between capitalism and the welfare state as a post-war transformative project and its contemporary variable form. They also pose a serious challenge to the historically idealised and optimistic vision of the welfare state as a resilient and permanent feature of capitalism (Castles, 2002; Gamble, 2016; Hacker & Pierson, 2018; Hemerijck et al., 2022; Huber & Stephens, 2001; Moran, 1988; van Kersbergen et al., 2014). Despite persistent critiques from both Right and Left, not to mention paradigmatic shifts in economic and political ideology since the 1940s that have remodelled the post-war social contract, the optimism of welfare state scholars' will has characterised the assumption that welfare states not only adapt, they endure.

While studies of the specifics of social policy inadequacies and general illfare are manifold, the mainstream literature indicates that the welfare state: (a) has survived intact and has been more resilient under pressure than its critics have suggested, (b) has been effectively rescued and rehabilitated by progressive reforms or at least protected by inertia, and (c) continues to be unquestionably accepted as a progressive force for good in the places that matter. These assumptions underpin what we refer to here as 'welfare optimism' and have inhibited a more critical assessment of welfare state resilience in the face of the cumulative impact of serial crises and more critical reflection on the permanence of the welfare state. To paraphrase Rosa Luxemburg, an absence of the socialism of the welfare state takes us closer towards barbarism and so its 'defence' is a logical response to neoliberalism's anti-social policy ideology (see e.g., Bean et al., 1985; Kuhnle, 2003; Wilding, 1986). This has been particularly true in the UK (Foster et al., 2015), where the Beveridgean settlement has been most brutally picked apart,¹ but such restructuring is not specific to the British welfare state (Korpi, 2003). Half a century of crises for the welfare state raises the question of why, when a huge amount of scholarly output in the field of social policy indicates increasingly unmet need, and the deleterious impact of government financial and ideological attacks on social welfare across the mature welfare states and beyond (UNRISD, 2022), optimism continues to prevail. In an attempt at balance we offer a more sceptical assessment that revisits and challenges the broad consensus on resilience that developed from the early 2000s and reflect on its substance in the 2020s.

Our proposition is that the weight of successive crises this century, coupled with enduring structural weaknesses within capitalism and the welfare state, gives greater cause for pessimist realism than welfare state optimism. We begin by briefly summarising the key theoretical positions on crises of, and for, the welfare state and the contribution they make to an understanding of contemporary challenges, before moving on to consider the approach of 'welfare resilience' as a theoretical position and its strengths and weaknesses in capturing the health of welfare states. Our key contestation is that the fact that social policies remain in place does not equate to the resilience or endurance of the 'welfare state'. In the absence of a thoroughgoing assessment of the quality of social policies and the ability of the welfare state to positively shape and resolve the systemic and anti-social tendencies of capitalism, optimism is not only questionable, but may be an obstacle to welfare state renewal in the future. From our analysis we conclude that unless the fundamental degradation of the welfare state is recognised through 'pessimism of the intellect', the 'optimism of the will' to renew the social contract is unlikely to be realised.²

2 | CRISES OF AND FOR THE WELFARE STATE

Much has been written about crises of, and for, welfare states. Rather than rehearse arguments elaborated in detail elsewhere, here we outline only the key themes. The idea of the crisis of the welfare state, that is, the systemic existential threats it is exposed to (rather than crises to which the welfare state responds) has its intellectual roots in the

1970s when severe economic challenges raised questions from across the political spectrum concerning the fiscal sustainability of welfare states and their structural compatibility with capitalism. One of the key thinkers of this genre—James O'Connor (1973)—argued that the primary function of the state was to create the conditions for economic accumulation (essentially private investment and growth) alongside social stability (or legitimation). The problem identified in this work, is that spending on one function often undermines the other. In particular, the growing cost of welfare provision undermines private sector growth by diverting, or ‘crowding out’, which squeezes profitability, private investment, employment and tax revenues. Others added weight to these arguments by suggesting that the inability of the welfare state to reconcile economic efficiency with social justice undermines legitimacy and stokes political tensions between opposing social classes that are ultimately impossible to smooth (Gough, 1979; Habermas, 1976; Offe, 1984).

Although these critiques were offered by the left, a similar set of arguments emerged from the right. Prominent thinkers including Milton Friedman and Rose Friedman (1980) and Bacon and Eltis (1978), argued that public expenditure was the cause of the economic crisis in the 1970s, again emphasising the ‘crowding out’ problem. Because for economic liberals the private sector is always more efficient than the public sector, the diversion of resources towards the state undermines growth, profits and investment which in turn, leads to unemployment and pressure on governments to do more. For Bacon and Eltis, high levels of public expenditure demanded by the welfare state had led to ‘too few producers’ in the private sector, undermining the very economic growth that was assumed to support capitalist welfare states. This argument also found expression in the post-2008 economic crisis period from which there developed a simple acceptance that contemporary capitalism is incapable of supporting large and generous (welfare) states and, as such, the structural crisis of the capitalist welfare state is inevitable and ongoing. The spread of neoliberalism through international governmental organisations, including the IMF, World Bank and European Union, has also meant that states have faced direct and indirect pressure to assume tighter controls over public expenditure and public debt whilst opening up major markets. In addition, the ideational ‘fix’ at the national and international levels has steered welfare effort towards accumulation or ‘competitiveness-enhancing’ activities and away from addressing human needs. As a result, social protection has become more ‘active’ (targeting spending on supporting employment) and public services have become more ‘private’.

Such solutions have actually undermined the capacity of public services to satisfy demand and expectations of service users leading to declining satisfaction and support for state provision. Nor has the 1970s crisis of the welfare state been resolved. In 2023, inflationary pressures and cost-of-living crises across advanced economies present the most significant accumulated ‘stress-test’ for welfare states to date, and so the conditions for the kind of fiscal crisis described by O'Connor in the 1970s endure.

More commonly discussed in recent decades than crisis stemming from structural problems within the capitalist welfare state, are ‘exogenous’ crises that threaten to destabilise it. Such events may themselves be the outcome of crises of the welfare state, but arise despite rather than because of the welfare state. Viewed in this way, economic recession in the 1980s, globalisation in the 1990s, the 2008 Global Financial Crisis, the Covid-19 pandemic and the climate emergency are all crises for the welfare state. The range of interconnected extensive and existential threats to human and planetary survival—characterised variously as ‘permacrisis’, ‘polycrisis’ or ‘omnicrisis’—are ones that the welfare state, based on work and economic growth, inevitably struggles to resolve. Crises moments also have to be viewed in another way, as manufactured events, ideologically harnessed and amplified in support of a strategy that serves to facilitate specific policy responses and ambitions (Clarke, 2023; Farnsworth & Irving, 2015; Offe, 1985). This brief summary of welfare state crisis and the challenges faced may make for generally bleak reading. It is important therefore to revisit other critiques that have reached rather different conclusions.

3 | REVISITING WELFARE STATE RESILIENCE

Despite its pervasiveness as an idea in social policy scholarship, and a substantial body of work over two decades indicating its existence, what is precisely meant by ‘resilience’ remains under-theorised (see reviews such as Green-

Pedersen & Haverland, 2002; Sainsbury, 2001; Starke, 2006). Indeed, some of the key arguments against welfare state crisis have been underpinned by little more than ideologically-charged assertions and wishful thinking.

In his critique of neo-Marxist analyses of welfare state crisis in the 1970s, for instance, Rudolf Klein (1993:206) argued that in contrast to what had happened in the 'communist nations of the East', the predicted fall in legitimacy had not materialised in capitalist societies. Klein refers to the 'crisis' position as 'O'Goffe's tale', and although his argument was largely based on an imagined claim since none of the triumvirate of which he wrote had defended the communist welfare states in this way, it signalled what Sainsbury (2001: 258) later termed a dissociation of comparative scholars from the 'doomsday scenario'. Klein saw institutional resilience borne out of the ability and desire of politicians to 'respond to challenges, including fiscal challenges, as they evolve' and thus that reforms, efficiency and targeting are all more likely than welfare state collapse. Yet, it is important to note that much of the literature on the crisis of the welfare state does not envisage its demise, but instead points to the impact of crisis on its design, funding and ability to resolve, or at least co-exist with, systemic crises that occur within capitalism. Therborn and Roebroek (1986: 39) are even more dismissive, stating that the crisis literature represented 'little more than an ideological fad, which serious researchers cannot take seriously'. Their counter-claim was that the welfare state is 'an irreversible major institution of advanced capitalist countries' that cannot be dismantled.

The dismissal of literature that points to crisis within welfare states perhaps makes sense in the context of ideological point-scoring, but it makes less sense as a claim about the endurance of the welfare state. Whilst it is true that the welfare state did not collapse in this period, this was in part because it helped governments to navigate beyond various crises that threatened to destabilise capitalism. It is also worth noting that concerns about welfare state 'crisis' extended beyond the academic literature to organisations such as the OECD which convened a multi-stakeholder conference entitled 'The Welfare State in Crisis' in 1981. The contributions to this meeting echoed many of the concerns raised by academics (OECD, 1981).

Of course, the prescribed medicine for dealing with crisis is most important in terms of implications for the welfare state. For the resilience thesis, the argument most commonly presented is that regardless of the nature of the crisis, the welfare state has not succumbed; instead it has remained surprisingly stable within and across nations. Given the relatively short life of the welfare state, this does not mean that resilience and survival should be assumed to be its defining features but this does lead to questions about what accounts for such resilience.

What underpins the resilience thesis is that expenditure on welfare states has remained constant; and three key explanations are offered to account for this. First, welfare states are argued to 'command popular support' (Moran, 1988) and this translates into their ability to mobilise resources and build institutional strength. Social policies have high popular legitimacy regardless of regime differences (Brooks & Manza, 2006), underpinned by strong advocacy groups (pensioners, public sector employees) whose electoral power prevents systemic or radical retrenchment. In the face of economic pressures, governments may undertake only as much restructuring as is politically possible, varying depending on how deeply welfare expectations are embedded, particular party political strengths and interest coalitions, and along paths not necessarily conforming to a 'leftist' commitment to welfare (Ross, 2000). Resilience here then is simply the periodised limits of retrenchment which are themselves self-expanding with each new round of attack on welfare guarantees. Welfare state erosion is recognised in the 'hidden' effects of incremental change and policy drift (e.g., Béland, 2007; Hacker, 2004), but while these analyses of change highlight the potential for incrementalism to ultimately result in radical change, the continuity of the 'welfare state' project itself is not in question.

Second, welfare states are argued to play an important economic function in helping capitalism to 'weather economic storms' (Moran, 1988). This echoes the 'accumulation' element of O'Connor's (1973) argument outlined above but, absent of discussions relating to 'legitimation' it has found more recent elaboration in work that views welfare states as important mechanisms for increasing or stabilising growth and/or pump-priming economies in the face of economic crisis. The rise of the 'competition state' (Cerny, 1997) or 'social investment state' represent attempts to balance social policies towards those that promote economic growth and income security. In the post 2008 context, 'social investment' is regarded as expansion rather than retrenchment or 'cost-containment', despite the admitted 'redistributive drift' that might accompany such measures (van Kersbergen et al., 2014).

Outside of national 'social investment' programmes (to which we return below) international governmental organisations such as the IMF, have also applied instrumental principles to the prioritisation of welfare expenditure which promises to boost the economy whilst relegating the conditions of the poorest to a second-order concern (see Farnsworth & Irving, 2018).

Third, welfare state institutions are held up as being especially resilient not only because of the preceding arguments, but because of their unique institutional qualities. Those parts of the welfare state that constitute insurance-type promises have policy legacy effects that make reversals and/or change more difficult. It has been suggested that it was Paul Pierson's institutional analyses (e.g., Pierson, 1994) of these effects that 'reshuffled the welfare state debate' and caused resilience to become the 'starting point' for subsequent study (Green-Pedersen & Haverland, 2002, pp. 43–4). Despite its limitations (Korpi, 2003), Pierson's work has undoubtedly been deeply influential in instituting the underlying assumption of welfare state 'immovability' in the terms of wider debate, capturing the imaginations of social policy scholars well beyond the specific policy changes and their meaning from Pierson's institutionalist perspective. Other explanations of resilience have also centred on the politics of welfare, the reshaping of social risks and how these two welfare state dimensions—the needs of its beneficiaries and the political processes by which these continue to be guaranteed (or not)—interrelate in shielding welfare states from resource offensives. The outcomes variously conceptualised and reconceptualised over time include restructuring, recalibration, recasting and retrenchment, but ultimately all maintain a 'resilience' outlook aiming to show empirically that while degraded along some measures, and in some countries, the welfare state had survived economic globalisation, demographic changes, and ideological attack (Esping-Andersen, 1999; Huber & Stephens, 2001; Kuhnle, 2000; Pierson, 2001). Despite sweeping welfare reform since the 1990s, and even following the 2008 Financial Crisis (Starke et al., 2013) and through the lost decade of austerity (Hemerijck & Huguenot-Noël, 2022; van Kersbergen et al., 2014), the welfare state resilience position has itself been remarkably resilient.

The post-2008 iteration of the resilience position is most explicit in the work of Anton Hemerijck and colleagues around 'social investment'. This work is illustrative in that it shifts attention to different elements of expenditure such as childcare, parental leave, education and active labour market policy, that are ostensibly reparative (Morel et al., 2012) but more closely resemble the 'social expenses' intended to foster social harmony in O'Connor's (1973) account, than O'Connor's direct measures of 'social investment'. As a longtime and consistent advocate for social investment and the cushioning (and therefore politically safe) function of the welfare state, Hemerijck (2011, p93) concedes a new range of threats to the post-globalisation 'reorientated' welfare state while remaining critical of more pessimistic analyses of post-crisis austerity measures such as Armingeon (2013) (van Kersbergen et al., 2014). Reflecting on the welfare impact of the pandemic Hemerijck et al. (2022, p. 4) do acknowledge that the 'austerity reflex' characterised the years following the financial crisis, but argue that 'In its expansionary boldness, COVID-19 crisis management stands in clear discontinuity'. This alongside evidence for the benefits of employment support, the European social insurance model and the multiplier effect returns on social investment strategies in some European countries, is presented as both an illustration of the survival of welfare states under pressure and as a more successful 'social investment recovery' for welfare state futures (compared to the US model), even in the 'frozen' welfare states of the 1990s. Hemerijck et al. (2022, p. 9) argue that 'we observe considerable cognitive and normative convergence across EU with respect to welfare provision....a shared understanding that the welfare state should correct and modify markets and economic policy if they fail to generate efficient and fair outcomes' and an 'overriding agreement that welfare services should empower and activate people to participate in the labour market'. The basis of this field of European comparative scholarship in the 2020s remains a pragmatic attempt to convince political powers that social provision should be maintained (with a different focus), and as an empirically supported answer to the kinds of explanations that political scientists have been seeking since the 1980s for the relative success of European states in weathering economic storms compared to states pursuing the anglo-American growth model (e.g., Hall & Soskice, 2001; Katzenstein, 1985). The key to this success according to Hemerijck et al. (2022) is demonstrated in higher and rising employment rates and the presence of 'big', expensive welfare states' that are more equal and score more highly on social investment.

While introducing some nuance into expenditure priorities, 'resilience' (or retrenchment) via social investment remains largely predicated on a thin conceptualisation of the welfare state gauged primarily on the depth and scope of expenditure, or 'size' and 'effort' as measures of welfare state commitment. In the abstract, 'social investment' expressed through the language of the market is essentially the economic instrumentalisation of social policy, characterised by the development of new ways to discipline the economic participation of those peripheral to the labour market (especially women) and their children (see e.g., Mahon, 2010). The welfare commitment of an 'active service-oriented' or 'capacitating' welfare state (Hemerijck, 2011) depends very much on the normative foundations of those services at the systemic level. A quantitatively-driven understanding of welfare state resilience is also consequently tied to patterns of social expenditure as a proportion of GDP, suggesting stability or advancement because spending generally increases over time (see Clayton & Pontusson, 1998; Taylor-Gooby, 2002). OECD SOCX data³ shows that overall social expenditure increased from 14.4% of GDP in 1980 to 21.1% in 2020, but if pension and healthcare expenditure is excluded, deeper cuts are visible across a broader range of states. Similar patterns are revealed if real terms expenditure (accounting for inflation) is considered, in constant prices and on a per capita basis. Social investment measures are often short-term and expenditure on active social policies has not, in fact, been maintained, even in relation to more passive unemployment measures.

Such approaches, which render the welfare state as 'nothing but a collection of sectoral policies' (Green-Pedersen & Haverland, 2002, p. 48) highlight the limitations of an institutionally strong but socio-philosophically frail conceptualisation of the 'welfare state' that privileges social security and health transfers,⁴ downplays other key pillars of security such as housing and social care services, and invisibilises the more qualitatively comprehended withdrawal of social expenses contributing to social and political disintegration, deepening poverty and widening social divisions and inequalities. In addressing this issue Green-Pedersen (2004, p. 6) has suggested that 'no definition of the welfare state is a priori better or worse than others' and that moving beyond the 'mainstream' (policy definitions) to other notions or outcome-led conceptions 'requires strong arguments'. It is also the case however, that while the reduction of welfare arrangements to their sectoral component parts may inform theories of policy change based on specific policy domains, it is not sufficient to make claims about the resilience (or failure) of 'the welfare state' as a whole (see e.g., Clayton & Pontusson, 1998).

The argument here rests on the assumption that 'welfare' is a normative concept, and that regardless of specific policy aims and across all polities and 'types', the 'welfare state' as it emerged in the 1940s, was a radical and inherently transformative project capitalising on a moment to tackle entrenched power to deliver for large parts of the working and middle classes. With reference to the sentiments expressed in the Beveridge Reports, the writing of the Myrdals on the Swedish experience and African leaders Julius Nyerere and Obafemi Awolowo in the 1960s, Adésinà (2015) captures this 'wider vision of social policy' and observes that 'transformative social policy involves a wide range of instruments to raise human well-being, transform social institutions, social relations and the economy' (Adésinà, 2015, p. 113). This transformative potential inheres in the realms of care, integration, opportunity, participation and so on rather than simple decommodification (Adésinà, 2015). In lieu of an arbitrary index representing the transformational welfare state, we can consider instead the range of rights included in the Universal Declaration of Human Rights (UDHR) adopted in 1948 by 48 of 56 countries represented at that year's meeting of the UN General Assembly. The UDHR emerged in the period in which the welfare states in the richest nations began to expand, and despite its limitations and omissions, for the purposes of argument here represents a proxy for an international understanding of what rights a future 'welfare state' should uphold, 'a step forward in a great evolutionary process' (United Nations, 1950, p. 535) for social welfare at a time of post-crisis disproportional consequence, extreme shock, political challenge and global uncertainty. While Article 23 sets out the core rights that would arguably underpin the 'welfare state' in the subsequent decades, the Preamble affirms the pursuit of dignity, equality, social progress and improved standards of living through education and a range of other universal and facilitating progressive measures. The UDHR stands as a radical post-crisis benchmark for human rights and their socially ameliorative outcomes instituted in the idea of a 'welfare state'. While Article 23 rights are potentially measurable, the more socially ameliorative (or otherwise) dimensions of the welfare state are admittedly far more complex and analytically opaque, and we

do not claim to fully represent them here. To date they have been most comparatively quantifiable in discretionary spending on 'social services' which are present as a cornerstone in early determinations of a 'welfare' state (see e.g., Briggs, 1961, p. 228). As Clayton and Pontusson (1998, p. 70) suggested, spending on social services also 'most directly contradicts the logic of capitalism' and regress in this area challenged the idea of 'resilience' even in the 1990s.

Most, if not all states have fallen short of the UDHR vision in some capacity. Post-war welfare state building in the richest nations tended to reinforce as much as mitigate unequal social relations of gender, race and coloniality (Bhambra, 2022; Fraser, 2013; Williams, 2018), and many social policies remain characterised by less benevolent and regressive elements of discipline, control and regulation. Nevertheless, the fact that egalitarian and more abstract socially progressive goals have not always been explicit in the politically determined operation of particular national social policies does not negate them as expectations or outcomes of a 'welfare state'. The question is rather whether a state's social policy can be considered to constitute a 'welfare state' without them.

Without such goals social policies can certainly constitute an 'illfare state'. The intrinsic value of social policies (Mkandawire, 2001) has been eroded by several decades of relentless and hegemonic ideological opposition expressed through political channels (see e.g., Fox Piven (2009) on the US case). Certain crisis points, for instance those that undermine political legitimacy and, specifically, satisfaction with democracy, may also be countered by high levels of welfare state legitimacy (Sirovátka et al., 2019), and robbed of their moral economy or 'social justice' elements (Streeck, 2014, p. 58) other versions of welfare have emerged including the re-gendering of welfare relations, nativism, the reassertion of cultural and religious homogeneity and widespread dissolution of minority rights from the electorally ascendent political right. Welfare nationalism for example can be generous and redistributive (Röth et al., 2018) and the danger is that focusing on expenditure levels or isolated policy goals rather than their social justice aims leads us to value social policies rather than the transformative welfare state.

4 | RETHINKING WELFARE STATE RESILIENCE: THE CASE FOR PESSIMISTIC REALISM

The above discussion has highlighted a number of sites of analysis that inform our evaluation of welfare state crisis and the resilience thesis. To reiterate our contention, the fact that social policies continue to exist does not, in and of itself, signify healthy welfare states that remain capable of achieving the aims and ambitions that were expected of them. In this section we illuminate the preceding argument using various data sources for a core set of states—the G7⁵ plus Sweden. This group represents high income economies with mature welfare states, that might otherwise be considered too 'big' and 'expensive' to fail. Sweden is added as the archetype of the progressive, enduring, social democratic societal model, and reputationally (Cox, 2004) the type of 'welfare state' converging most closely with the articles of the UDHR.

While the general picture of stability in expenditure and generosity may add confidence to the idea that social policy survives, this does not necessarily support the broader claim of welfare state resilience. Where social expenditure stability or growth is explained by measures intended to preserve the economy, or maintain consumption in response to exogenous crises these are not durable expansions of the welfare state and tend to be quickly followed by backlash to recoup extra spending. If the welfare state aims to correct the market in pursuit of fair outcomes then inequality is far more illustrative of decline than resilience. The headlines in Table 1 suggest that although Sweden is a much less income unequal country than the comparators here, the gap between those at the top and those in the lower half of the income distribution is widening, and amongst the G7, only in France has the (still wide) gap shown stability between 1980 and 2020. We could also consider household wealth accrual as an indicator of welfare state resilience (through security and social mobility for example) and again it is clear that the concentration of wealth amongst the top 10% across all of the G7 plus Sweden suggests that these societally transformative goals have not been met.

TABLE 1 Inequality indicators, 2021, G7 plus Sweden.

| | Canada | France | Germany | Italy | Japan | Sweden | UK | US |
|----------------------------------------------|-----------|---------|-----------|-----------|-----------|-----------|-----------|------------|
| Gap between top 10% and bottom 50% 1980–2020 | Widening↑ | Stable↔ | Widening↑ | Widening↑ | Widening↑ | Widening↑ | Widening↑ | Widening↑ |
| Top 10% to Bottom 50% income gap | 1 to 13 | 1 to 7 | 1 to 10 | 1 to 8 | 1 to 13 | 1 to 6 | 1 to 9 | 1 to 17 |
| Top 10% income share 2021 | 41% | 32% | 37% | 32% | 45% | 31% | 36% | 46% |
| Top 10% share of total household wealth 2021 | 58% | 60% | 60% | 48% | 58% | 58% | 57% | 71% (2020) |

Source: Chancel et al. (2021) Country Appendix.

These figures on income and wealth deciles mask the even-more significant and rapidly increasing disparities between the very richest global billionaires and the rest. According to a joint report between Oxfam and the World Economic Forum in 2023, the top 1% of the world's population owned twice as much as the remaining 99% of the world's population and billionaires have seen massive gains in their share of wealth since the 2008 financial crash. Whilst such staggering wealth disparities go beyond the welfare state, the policies that facilitate and create such inequality are policy-adjacent—including taxation, employment conditions and regulations—and they illustrate challenges of incapacity for welfare states.

As highlighted in the resilience literature, the welfare state depends largely on legitimacy. The extent to which the key elements of the crisis of the welfare state—the theoretical consensus points of resource crisis delineated by Moran (1988)—are accepted as true by political elites and subsequently fed into public discourse to the point of orthodoxy, matter far more as a whole than they do as individual components. The key ‘truths’ are that the welfare state is unproductive; that it produces dependency; that it disrupts labour market discipline and that it requires taxes levied to the point of creative exhaustion (see Moran, 1988, p. 403). These translate into both beliefs about the relative ‘burden’ of the welfare state overall, acceptable welfare conditionality, the limits of benefit generosity and acceptable taxation rates (or as Gelissen (2020) explores, tolerable evasion) but also reshaping of those beliefs through policy action.

There is a significant literature that considers the question of popular legitimacy and finds no crisis (see e.g., Roosma et al.'s (2013) analysis of 2008 ESS data). Although the most useful quantitative measure available, attitudinal data is subject to limitations (Chung et al, 2018), and interest group variance (Cappelen et al, 2018). Echoing the work of Taylor-Gooby in the 1980s (Taylor-Gooby, 1985) Roosma et al. (2016) add nuance to support for the welfare state found in previous unidimensional studies, suggesting that despite general support for welfare goals, disappointment with welfare state effectiveness and widespread concern about abuse of welfare provisions exists across all countries. Rather than countering these concerns with the pursuit of social cohesion, governments instead exploit fears with disingenuous attempts to reinforce divisions between the ‘deserving’ and ‘undeserving’ (e.g., Devereux & Power, 2019). Neither is this policy approach limited to the liberal welfare regimes (Lundström, 2013) with recent examples in France (Le Monde, 2023) and less effectively in the Netherlands (The Economist, 2021). Combined with a ‘hostile environment’ for migrants in all mature welfare states, these policy tendencies do not represent a means to strengthen ‘solidarity-enforcing arrangements that undergird the legitimacy of the welfare state’ (Gelissen, 2020, p. 360), but rather act as strategies to delegitimise them, both in discourse and in practice, thereby making cuts popular.

At the national level, we can consider the importance that is afforded to welfare provision and its continuation in electoral messaging and success. The level of support for the welfare state expressed by parties seeking election is an indicator of (a) the extent to which welfare provision is perceived as electorally important by those seeking office and (b) the extent to which political parties wish to make it so. To flourish, the welfare state requires government commitment plus explanation for, and projection of, this commitment in public-political discourse. The Manifesto Project provides data that facilitates the examination of this dimension over time. To draw conclusions about how policies may or may not attract voter engagement, we focus analysis on the two most 'successful' political parties in each country over the 1940–2020 period and, in order to provide an indication of relative support, we also indicate the vote share of both parties. For our case countries we have plotted the two most successful parties in each subsequent election over time (see Figure 1). The bold line identifies the winning party, in effect charting whether, amongst other issues, electorates vote for positive or negative visions of social policy. Clearly, electorates cast votes according to multiple issues and criteria, but social policies are sizeable and therefore important within each of these countries.

The y-axis range is standardised across all country plots for visual comparability, with plus figures gauging the strength of positive support for expansionary welfare policies and minus figures gauging support for contraction. It is important to note that the score is not cumulative and captures a single moment in time referencing the level of positivity or negativity concerning social policies given different policy contexts. If the prevailing context is very negative, an opposition party may well release a manifesto that makes a positive case for expanding social provision, but the package of measures may still represent a relatively conservative, regressive and/or punitive set of reforms. Nonetheless, these relative positions are useful to us insofar as they indicate the direction of policy movements. It is noteworthy that this plot of winning and runner-up parties within each nation reflects left versus right perspectives on the welfare state, indicating that voters will tend to seek out parties that are poles apart in terms of their social policies. We would expect this in two party states but not in multi-party states. The solid black line that plots electoral success over time signals that winning parties tend to be those that are more negative about social policies after the 1950s. Sweden is the only country that consistently votes for expansionist social policies throughout this period.

Generally speaking, the two largest parties at each election tend to occupy distinct 'left' and 'right' positions either side of the neutral (zero) point line. Left-leaning parties also register consistent positive scores and right-leaning parties register less positive scores. The gap between the two parties is widest in Sweden, with highly positive views on social policy in one party contrasting with deeply negative perspectives in the other. In some countries, the two parties track closely to each other (e.g., Canada) suggesting fewer political options; in others, the gaps remain more constant (France, UK, Sweden and the US). The penultimate election in each country suggests a recovery in positivity regarding social policies, following sustained periods of negativity in most nations. The most recent manifesto analysis suggests a shift back towards negativity in all nations apart from the US. The US is also the only country where support for welfare expansion after 2010 is higher than for any previous period, but again this is against the backdrop of minimalism in the welfare state and the significance of health care as a key political issue. Even here, level of positivity remains lower than for the other countries apart from Canada.

Notwithstanding the limitations of expenditure-focused approaches, the most convincing account of welfare state resilience is that expenditure on the welfare state remains high, with few signs of falling. Expenditure can also be considered from a different perspective however, taking into account future plans. Given that countries are still emerging from the Covid crisis, we would expect expenditure to be high, just as it was in the aftermath of the 2008 financial crisis. What will be decisive for welfare states is the direction spending decisions will take and here the outlook is far from encouraging.

The IMF compiles national fiscal plans for future years in its Fiscal Monitor database. From 2023, this shows national plans to rapidly restore expenditure to pre-pandemic levels with cuts being imposed across all countries (see Table 2). By 2028, the UK, along with France and Sweden, are planning public expenditure levels to be lower than during 2014—the height of the previous austerity period. One of the core drivers of expenditure cuts (austerity or fiscal consolidation) is rising debt levels, and the costs of servicing debt where interest rates are high and borrowing

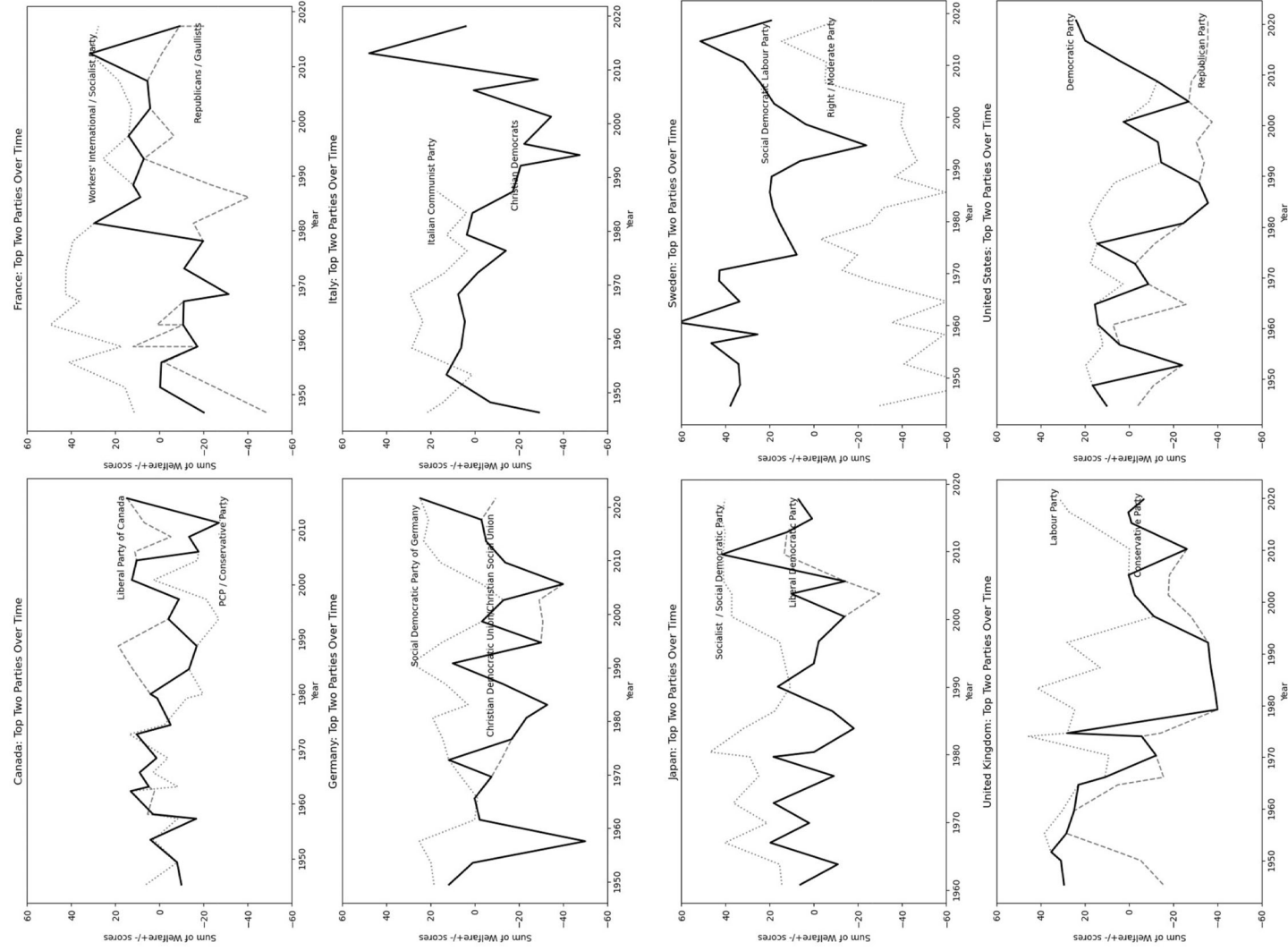


FIGURE 1 Manifesto policies, G7 plus Sweden, 1940s–2020s. *Source:* Author compiled from data released by Lehmann et al. (2023) The Manifesto Project, 2023.

TABLE 2 General government expenditure, 2014–28 (IMF staff estimates from 2022), (Percent of GDP).

| | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
|----------------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|
| Canada | 38.4 | 40.0 | 40.8 | 40.5 | 40.7 | 40.6 | 52.7 | 45.9 | 41.5 | 41.1 | 41.0 | 40.9 | 40.9 | 40.9 | 40.9 |
| France | 57.2 | 56.8 | 56.7 | 56.5 | 55.6 | 55.4 | 61.5 | 59.1 | 58.5 | 58.1 | 56.7 | 56.0 | 55.6 | 55.4 | 55.5 |
| Germany | 44.3 | 44.1 | 44.4 | 44.2 | 44.3 | 45.0 | 50.4 | 51.3 | 49.7 | 50.7 | 48.8 | 47.9 | 47.8 | 47.6 | 47.6 |
| Italy | 50.9 | 50.3 | 49.1 | 48.8 | 48.4 | 48.5 | 57.0 | 57.3 | 56.8 | 53.7 | 51.9 | 50.8 | 50.0 | 49.2 | 48.5 |
| Japan | 38.4 | 37.3 | 37.2 | 36.7 | 36.7 | 37.3 | 44.6 | 42.8 | 44.0 | 42.1 | 39.4 | 38.3 | 38.5 | 38.8 | 39.1 |
| Sweden | 49.7 | 48.4 | 48.8 | 48.2 | 48.8 | 48.1 | 51.0 | 48.4 | 46.8 | 46.8 | 48.0 | 48.0 | 47.8 | 47.8 | 47.8 |
| United Kingdom | 41.2 | 40.3 | 39.5 | 39.0 | 38.7 | 38.5 | 49.9 | 46.3 | 45.1 | 45.0 | 43.6 | 43.1 | 41.2 | 39.8 | 38.4 |
| United States | 35.4 | 35.2 | 35.6 | 35.4 | 35.6 | 36.0 | 44.8 | 43.0 | 38.5 | 38.2 | 38.4 | 38.4 | 38.5 | 38.6 | 38.8 |

Source: IMF staff estimates and projections. Projections are based on staff assessments of current policies.

TABLE 3 Welfare reform expectations 2020–22, G7 plus Sweden.

| Measures | France | Germany | Italy | Japan | Sweden | UK | US |
|------------------------------------------------------------------------|--------|---------|-------|-------|--------|----|----|
| Target and rationalise social protection to meet fiscal objectives. | | X | X | X | X | X | X |
| Cut or cap public sector wage bill | X | | X | | | | |
| Pension reform | X | | X | X | | | X |
| Waiving/reducing employer social security contributions during Covid19 | X | X | X | | X | X | |
| Labour market flexibilisation | | | X | X | X | | |
| Cut health expenditure | | | | | | | X |
| Increase consumption taxes | | | X | X | | X | X |
| Reduce Corporate taxation | X | X | | | X | X | X |

Source: Adapted from Ortiz and Cummins (2022) Annex 2.

on international markets more difficult. Yet, the contribution of taxation (at least on the better off) is projected to be relatively limited compared with spending cuts. Gross debt in advanced economies is on average, in excess of 112% of GDP; and all economies within our sample here will exceed this level by 2025 except Germany which is projected to have gross debt of around 65% GDP (IMF Fiscal Monitor, 2023). This is important because if recent history is repeated, governments with higher levels of debt will be under greater pressure to run balanced or surplus budgets and will seek to achieve this through a combination of reducing expenditure and raising taxes that are not conducive to a reparative welfare state. Of course, much can happen in the intervening period, but governments are locking themselves into fiscal planning that is based on consensus economics, thus it is likely that future governments will be somewhat tied into the decisions made today.

More evidence of consensus towards austerity can be found in IMF country reports. These reports reflect both the high level policy advice received and either government willingness to incorporate advice into future spending plans or, at the very least, national economic signals and statements of intent. Based on analysis of IMF country reports published in 2020–22, Ortiz and Cummins (2022) find that other than Canada, all G7 countries plus Sweden were amongst the 120 countries either considering, being advised to, or having in place the retrenchment measures listed in Table 3 below.

While it is possible that all these measures may not ultimately be implemented, the breadth and type of these reforms do not indicate a strong commitment to welfare spending or imminent welfare state renewal. Whilst the global pandemic initially promised new recognition of the importance of public sector workers, especially in education and health services, and some expansion (e.g., in employment support provisions) there is little evidence at present that this has reinforced the commitment to welfare, even in the big, expensive welfare states (Hansen & Dahl, 2023). Thus whilst the resilience thesis suggests that positive public opinion will convert into political action and votes that will protect the welfare state, the manifesto data suggests that negativity about the welfare state is actually more electorally successful (see also Fraser, 2015).

5 | CONCLUSIONS

In historical perspective it is clear that welfare states require continual support across class and demographic divides, political commitment to their purpose and aims, and robust defence against economic threats. They need to be rights-based and provide legal guarantees to security and wellbeing and to social and political participation. They also require underlying trust in governments (Garritzmann et al., 2021). While the contradictions of the welfare state

remain unresolved, crises for the welfare state have redirected resources and diverted the attention of policy makers away from the project as a whole and towards specific technocratic fixes. While the crisis position of the 1970s may have been characterised as one of pessimistic despair, the continual application of wishful thinking to the over-emphasis of limited social policy gains in the face of catastrophic welfare state losses cannot provide the conditions for a progressive welfare resettlement.

Underpinning the resilience position is the assumption that welfare states are capable of successfully navigating and resolving crises through adaptation which albeit sometimes extensive, has yet to be terminal because in addition to its economic function, the welfare state also has political support. The question we have addressed here is whether when combined with an unresolvable contradiction and the effects of serial exogenous crises, the contemporary health of welfare states justifies such optimism. Our analysis suggests that in order for social contract renewal to occur, explanation of the shifts in social policy aims and their impact on equality requires pessimistic realism rather than palliation through a lens of welfare states' economic function. The evidence discussed does not indicate the championing of the welfare state either in popular opinion, electoral politics or expenditure planning. Where political parties include welfare promises in their electoral strategies this does not necessarily translate into election, welfare expansion or progressive outcomes. Where 'resilience' has been identified across time—in the 1980s and through the recent pandemic—measures have been used as tools of crisis management to fix deficiencies in labour markets and short-term interruptions to consumption, retrospectively narrated as strengths of the welfare state. In such contexts, there is little to demonstrate the welfare state as an enduring symbiotic project bridging economy and polity, as was essential for welfare state expansion during the post-war period.

A major feature of late capitalism is a worsening of economic inequality, not an improvement. Thus in their current form welfare states are as likely to exacerbate illfare as welfare since they are directed to the protection of capitalism rather than the protection of people. The crises faced by societies are greater now than when welfare states were established and there is unquestionably a need to present the welfare state as a co-ordinated, durable solution, rather than a capacitating fix. However, the evidence of a shared understanding or desire for this project is scant. The character of mature welfare states today bares little resemblance to the guiding principles instituted in the mid twentieth century and re-embedding such principles cannot rely on optimism alone. The welfare state, in light of the multiple crisis events it faces, needs not to simply 'exist' as part of a set of institutions that support capitalism; it needs to play a central part in the resolution of crises, politically and economically capable of rising to the challenges we face.

DATA AVAILABILITY STATEMENT

The data that support the findings of this study are available from the corresponding author upon reasonable request.

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ENDNOTES

- ¹ The most recent Destitution in the UK study for example, reports 3.8 million people having experienced destitution in 2022 (Fitzpatrick et al., 2023).
- ² The phrase 'pessimism of the intellect, optimism of the will' is popularly attributed to Antonio Gramsci in an article published in 1920 but was originally used by Romain Rolland in an earlier 1919 review (see Antonini, 2019).
- ³ <https://stats.oecd.org/>.
- ⁴ The crux of the dependent variable problem for quantitative cross-national comparison of retrenchment as explored in Green-Pedersen (2004).
- ⁵ The G7 includes Canada, France, Germany, Italy, Japan, the UK and the US.

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How to cite this article: Farnsworth, K., & Irving, Z. (2024). Crises of the welfare state, resilience, and pessimism of the intellect. *Social Policy & Administration*, 1–16. <https://doi.org/10.1111/spol.12996>