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**Comparative Political Economy of Long-Term Care for  
Older People: Political Logic of Welfare State Restructuring**

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**Comparative Political Economy of Long-Term Care for Older People:  
Political Logic of Universal Social Care Policy Development**

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Abstract

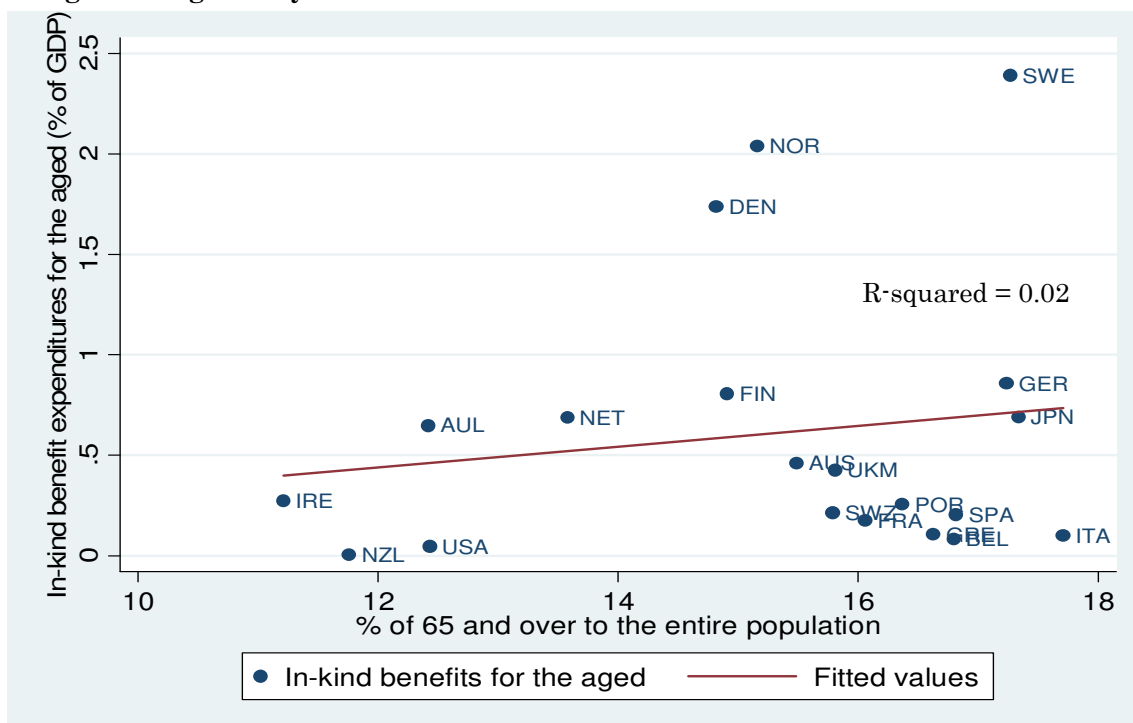
Despite common socio-demographic pressures, public elderly care programs are varied across advanced industrialized countries. While the current literature on social care devotes itself to describing the care arrangements of each country and pigeonholing welfare/gender regime types, it does not address this puzzle sufficiently. This study tries to specify the causal relationship between political institutions and public long-term care programs. It argues that the countries with personal-vote-oriented electoral system and/or fragmented party system have difficulty in developing universalistic public elderly care programs whereas the countries with party-vote-oriented electoral system and cohesive party system are likely to develop generous elderly care programs. This article tests this claim by examining the pooled time-series and cross-section data of advanced democracies from 1980 until 2000 with several types of regression models. The empirical results suggest that politicians' reliance on the personal vote and the fragmentation of ruling coalition impede the expansion of public spending for elderly care.

Keywords: welfare states, public policy, elderly care, electoral rules, party system

## Introduction

Long-term care for frail older people is one of the most serious policy challenges in current advanced industrialized countries. Since the society is aging, traditional family systems are collapsing, and more and more women are entering the labor market, the conventional system that women care for dependent adults as unpaid work within households is no longer sustainable. In most advanced democracies, therefore, policy makers are now facing growing societal demands for care for frail older people. However, policy responses to those socio-demographic pressures are not homogenous. In fact, as Figure 1 suggests, the percentage of old-aged population hardly accounts for the variation of public spending on elderly care services.

**Figure 1. Two-Way Graph of Old-Age Population Rates and In-Kind Benefits for the Aged among Twenty OECD countries in 2000**



Note: The data of Canada is missing.

Source: In-kind benefit expenditures for the aged: OECD (2004) Social Expenditure Database (SOCX) 1980-2001; the percentage of the aged population: OECD (2007a) Health Data.

This study explores how political institutions affect the arrangements of social care for the aged among advanced democracies. As I argue later, current social care literature rarely discusses the political factors forming elderly care policies. Feminist social policy scholars, who are dominant in this research field, devote themselves to examining the arrangements of child and elderly care across countries and its relation to welfare/gender regime theory, but they tend to pay less attention to the causal factors creating those caring regimes. Furthermore, there are very few conceptual works that use an analytical framework and compare public elderly care policies across countries, though many one-country case studies exist in a number of edited volumes.

Contrary to the previous research, this study tries to specify the causal relationship between political institutions and public elderly care policy. It will argue that the characteristics of voter-politician linkages in each country explain the variation of public elderly care policy. There are various types and forms of political competition across countries (cf. Kitschelt & Wilkinson, 2007b). Whereas political parties compete with each other through their party platform and generic public policy in some countries, party politicians compete with each other through patronage-based, contingent benefits for clients in some other countries. As Lynch (2006) already exemplified in her pioneering work, while programmatic party competition promotes citizenship-based, universal welfare programs, particularistic party competition encourages occupation-based social insurance programs. Public elderly care programs are provided for those who need the services as a means-tested or citizenship-based universal service, and their provision is hardly occupationally stratified. Hence, this study also claims that whereas programmatic political competition is favorable for the development of elderly care policy, particularistic political competition is unfavorable

for it.

Although Lynch (2006) does not specify the causal factors of types of party competition (programmatic vs. particularistic) and Kitschelt et al. (Kitschelt and Wilkinson, 2007b, a; Müller, 2007) deny the effects of political institutions on the forms of citizen-politician linkage, this study argues that political institutions, especially electoral rules and party systems, affect the development of elderly care programs by determining the mode of intra- and inter-party competition in each country. On the dimension of intra-party competition, when electoral rules give party politicians incentives to compete with each other within their same political party, those rules promote particularistic political competition because under those rules politicians need to secure personal votes through patronage-based benefits rather than wage their electoral campaign under the party platform. The intense intra-party competition dismantles the party leadership, paralyzes the party platform, and motivates party politicians to favor particularistic benefits for their clients. On the other hand, when electoral rules discourage party politicians to compete with each other within a party, party politicians seek party votes rather than personal votes in their electoral campaign. Since political parties become the unit of political competition, those electoral rules are favorable for programmatic competition.

On the dimension of inter-party competition, this study maintains, political parties prefer targeted social benefits if party system is fragmented along regional, lingual, ethnic, and religious cleavages. When a ruling coalition is composed of various political parties representing their own social groups, public policy tends to be targeted for each group. Even if political parties are centralized and compete with each other through their party platform, universal social care programs are less likely to

thrive under the fractionalized coalition government because each coalition party has no incentive to appeal to broader constituencies. On the other hand, if a catch-all party dominates its ruling coalition or coalition parties are homogenous enough to seek similar support bases, public policy is inclined to appeal to broader constituencies *unless the dominant party itself is decentralized*. Whereas a fragmented party system along various social cleavages promotes particularistic party competition, one-party dominance or a cohesive party system encourages the development of universal social care services, *ceteris paribus*. Overall, public elderly care services are likely flourish only if a country has the electoral rules promoting party votes *and* its governing coalition is composed of political parties trying to appeal to similar constituencies.

This article consists of the following parts: The next section reviews the literature on social care for the aged and points out that political factors need to be brought into the research on social care; The third section presents the hypotheses explaining what generates the current variation of the elderly care arrangements across advanced democracies; The fourth section presents the data to be analyzed and the operationalization of explanatory variables; The fifth section explains the methods used in this study; The sixth section shows the results of quantitative analysis; The final section concludes the entire argument and refers to the future tasks.

### **Literature Review**

In the last two decades, the studies of social care for frail older people have achieved remarkable progress (cf. Jamieson, 1991; OECD, 1994; Lechner and Neal, 1999; Anttonen et al., 2003; Kröger and Sipilä, 2005; OECD, 2005; Pfau-Effinger and Geissler, 2005; EUROFAMCARE-consortium, 2006). Although these comparative

studies are useful for understanding the social care arrangements of each country and how diverse they are in Europe and in the world, these studies do not adequately explain the causes of cross-national variation of social care arrangements, either because they are merely descriptive, or because they lack a rigorous analytical framework, or both. For instance, although Anttonen et al. (2003) point out the common trend toward individualization and universalization of social care and the remaining divergence of social care systems in their cases, they resort to a particular history of care systems in individual countries when they try to explain the divergence. As another example, Pfau-Effinger (2005) tries to explain the different development paths of social care systems in Europe from the framework based on cultural accounts ('family values' and 'welfare values'), but the differences of norms and values are inferred from the variation of social care policies and practices. Since the independent variables derive from the dependent variables, Pfau-Effinger's argument is facing the danger of tautology.

It is feminist scholars who have made important contribution to conceptual and analytical progress of the social care research. Their critiques of power resources theory, primarily Esping-Andersen's (1990), clarify that mainstream welfare state literature fails to take gender relations into its theoretical framework. For instance, Esping-Andersen's (1990) concept of decommodification—emancipation from labor market based on citizenship rights—supposes that the emancipated citizen is in paid work force. However, the welfare state cannot decommodify women in this sense because many women are confined to unpaid work and have no access to paid work (Lewis, 1992; O'Connor, 1993; Orloff, 1993; Sainsbury, 1994, 1996; Lewis, 1997). Thus, feminist scholars claim that welfare state theories should concern, not just the dual relationship between state and market, but the tripartite relationship among state,

market, and family (O'Connor 1993). In this context, social care services become a central research topic of feminist welfare state studies since women cannot be emancipated from unpaid care work within households unless the state and/or the market take over their care work. And feminist social policy scholars have elaborated their typologies of welfare regimes through comparing the state-family nexus across countries. Mainstream welfare state theorists have responded to feminist scholars' critiques against them, and fruitful dialogues between them have generated the typologies of welfare states incorporating the dimension of gender relations (Lewis, 1992; Orloff, 1993; Siaroff, 1994; Lewis, 1997; Esping-Andersen, 1999; Korpi, 2000).

However, the feminist welfare state research does not address the questions of why social care arrangements for frail older people are varied across countries sufficiently. While feminist scholars are interested in pigeonholing gender relations and welfare regimes, they do not intend to present a solid causal argument explaining the current configuration of social care policies. While feminist scholars are concerned about 'what kind of care and what kind of care relations can contribute to the degendering of welfare states' (Knijn and Ungerson, 1997: 325), they do not try to specify the explanatory variables of the typologies they have elaborated. Feminist social policy scholars relate the strength of male-breadwinner/female-caregiver model to the types of care arrangements, but their typologies of gender relations are induced from the types of social care systems. We cannot explain the variety of social care arrangements unless we get over this cyclical argument between public policy and gender regimes and then find the political logic behind the public policy sustaining the current gender regimes.

Another problem of the current social care studies is that feminist social policy

scholars tend to combine child care and elderly care under the concept of social care and mostly concentrate on child rearing provision through the market and/or welfare states. This is understandable because both types of care have been provided by women within households, and because child care provision is more imminent for securing paid work for women. However, child care and elderly care need to be separated conceptually. Child daycare policy has been deeply embedded in child education policy in some countries (e.g., France and Belgium), and therefore the logic of public child care policy development might diverge from that of other social policies (see Morgan, 2006). In fact, as Anttonen and Sipilä (1996: 94) suggest, the volume of social care services for children are not necessarily correlated with that for the elderly.

There are a few exceptional works trying to specify a causal relationship between social care systems for frail older people and political factors. For example, Alber (1995) argues that modernization theory and power resources theory are not enough to account for the variation of social care services among European countries, and he proposes to take into consideration inter-governmental relations and church-state relations to explain the variation. However, as Alber himself admits, the cross-national data of this research is sketchy and his argument is not fully supported by empirical evidence. In addition, Campbell and Morgan (2005) suggest that the difference of federalism structures generated distinct reform efforts of long-term care for the frail older people between Germany and the U.S. Although their argument that political institutions can affect the outcome of reform efforts is convincing, they do not operationalize their explanatory variable—varieties of federalism—enough to make it possible to compare other countries beyond their two-country comparison. Morel (2006, 2007) emphasizes the role of bureaucracy in the ‘expansion’ of public social care

services in Bismarckian welfare states. She argues that new care policies aim to restructure the existing social policies to retrench other cash benefits rather than expand the role of welfare state in social care. Although her argument and empirical evidence are convincing, the presence of bureaucracy pursuing budget cuts is constant across countries, and therefore it cannot explain the cross-national variation of elderly care systems.

Overall, while the comparative research on social care for the aged has shown remarkable progress in the last two decades, it is not enough to explain what creates the cross-national variation of elderly care systems. The literature has accumulated a significant amount of knowledge on the arrangements of social care for frail older people. Due to the existing studies, we can now see national patterns of public and private care provisions, the developments of public long-term care policies, and the convergence and divergence of those care arrangements across countries. However, the existing literature does not sufficiently specify the causal factors generating the current diversity of social care arrangements for frail older people across advanced industrialized countries. Although feminist social policy research has revealed the shortcomings of mainstream welfare state studies and succeeded in bringing 'social care' into the mainstream, their typologies of welfare/gender regimes do not account for the variation of social care systems because their typologies lack solid explanatory variables. There are a few pioneering attempts to identify political factors influencing social care policies for the aged, but they are still in a rudimentary stage. This study is an attempt to fill in the lacuna the previous research left to us.

## **Hypothesis**

This section claims that the form of intra- and inter-party competition structures the development of public elderly care policy. Universalistic social welfare programs face coordination problems in two levels. First, if each politician competes with her colleagues within the same party, those universalistic programs are not attractive to her because those programs benefit broader constituencies but do not specifically contribute to her re-electability. Thus, the development of universal social care policy requires the strong control of party leaders over their rank-and-file members. Second, if each coalition partner represents different social clouts, universalistic welfare programs are not attractive to each party because it is expected to bring specific benefits to its constituencies and differentiates itself from other coalition partners in order to expand its influence in the next election. Hence, this study maintains that while the party-vote-oriented electoral rules and the cohesive ruling coalition encourage the programmatic party competition and favor the development of universal social services, the personal-vote-oriented electoral rules and/or the fragmented ruling coalition reflecting diverse social cleavages promote the particularistic party competition and impedes the expansion of those universal programs.

### *The logic of social care service development I: intra-party competition*

Although it has not attracted enough attention in the welfare state studies so far, the structure of intra-party organizations influences the arrangement of social protection. The 'intra-party organizations' refer to the organizational structure under which the leaders of political parties control their rank-and-files, and the structure is considerably

different across countries. On the one extreme, a political party is highly disciplined, and it behaves as if it is a unitary actor. For example, the party leaders control their legislative members in the Norwegian parliament, and the latter rarely defect from the party leadership in the roll call voting there (Rasch, 1999). On the other extreme, the party leaders have little control over the rank-and-file legislators. For instance, the members of the Congress traditionally have weak party disciplines, and their cross voting is prevalent in the U.S. The candidates of the House and the Senate run the campaign by themselves, and then party leaders have less control over candidate selection and campaign finance. As a result, political parties are so fragmented that they are “no more than conglomerates of candidates’ private organizations” (Katz, 1986: 102).

These characteristics of intra-party organizations derive from the attributes of electoral rules. The distinction between ‘party vote’ and ‘personal vote’ is helpful for understanding this relationship (see Cain et al., 1987; Carey and Shugart, 1995). Some electoral systems give candidates the incentives to seek personal reputation rather than party reputation in order to get (re)elected. For instance, the proportional representation (PR) system with open list induces a candidate to differentiate herself from other candidates to secure votes enough to get elected, and therefore it gives her the incentive to compete with her colleagues of the same party. The single majority district (SMD) system with primary or run-off similarly motivates a candidate to compete her colleagues on the purpose of ensuring her candidacy. These electoral rules encourage politicians to strive for personal vote. Since just sticking to the party platform does not give any leverage for candidates in the intra-party competition, these electoral systems encourage politicians to prioritize personal reputation over party

reputation and defect from the party leaders if necessary. These practices weaken the party leadership (cf. Katz, 1986).

On the contrary, some electoral rules put more weight on the party vote than others. For instance, the closed-list PR system induces politicians to pursue party reputation if their party leaders control the access to the list and decide its order. In the SMD system, politicians are also conscious of the will of their party leaders if the party leaders nominate a candidate in a district. These electoral systems encourage the rank-and-file legislators to follow the party leadership and make a political party look like a unitary actor. In other words, party-vote-oriented electoral systems create a centralized political party and concentrate political power on its party leadership.

To what extent a certain electoral system rewards candidates for the personal vote (or the party vote) has important implications for the mode of party competition. When the electoral system gives politicians incentives to compete with intra-party competitors and cultivate their personalized support base, the candidates are required to distinguish themselves from other candidates of the same party. In this respect, sticking to the party platform and providing generic public policy for constituencies is not the best strategy for politicians under the electoral systems rewarding the personal vote because the reputation acquired through generic programs goes to the party. Rather, under these systems, the following strategies are more desirable for each politician: bringing 'pork barrel' to her district or constituency groups; protecting a particular industry through regulations or tax breaks; or benefiting specific constituency through occupational social insurances.<sup>1</sup> The politicians can secure their support base

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<sup>1</sup> Estévez-Abe (2008) brilliantly demonstrates that the single non-transferable vote system, which severely prioritizes the personal vote over the party vote, created Japan's

enough to win a seat through targeting the benefits of public policy on particular constituency.

On the other hand, when the electoral system only allows a party vote, committing to the party platform and advocating general public programs is a better strategy for the rank-and-files. Since the party leadership can penalize the members who deviate from the party's policy, a politician has no incentive to differentiate herself from her colleagues. Contributing to the entire party secures her re-election and career promotion in the party. In addition, cultivating a personal support base among the electorate through constituency services is costly for each politician, and therefore she prefers to 'free-ride' the party platform and party reputation at an election if those services do not affect her electability. Overall, whereas the personal-vote-oriented systems create the patronage-based competition, the party-vote-oriented systems generate the programmatic competition in the political system.

The above argument provides us with a testable hypothesis for the politics of elderly care policy. Since frail older people are spread across electoral districts and less organized than other constituency groups such as trade unions, farmers, and small businesses, expanding public long-term care services for the aged is not attractive policy for politicians under the electoral systems promoting politicians' reliance on the personal vote. On the other hand, because the party leaders anxiously seek to add unorganized swing voters to the support base under the electoral systems encouraging the party vote, those electoral systems more efficiently translate the growing societal demands for elderly care services into public programs. Thus, it can be hypothesized

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peculiar social protection system—employment security through public work projects, heavily protected domestic industries through regulations, fragmented social insurances, and a small welfare state.

that to the extent that an electoral system promotes the personal vote has negative effects on the development of public elderly care programs.

*The logic of social care service development II: inter-party competition*

Following Alber (1995), this study also adopts Lipset and Rokkan's (1967) social cleavage approach. Lipset and Rokkan argued that in Western European countries the party system reflects social cleavages that existed at that time when it was 'frozen' after the extension of suffrage in the 1920s. They classified those social cleavages into four dimensions: labor-capitalist dimension, center-periphery dimension, state-church dimension, and land-industry dimension. As Alber (1995) points out, while power resources theory focus on how public policy reflects the class relations (cf. Korpi, 1978, 1983), other dimensions of intra-party competition are also important for social services. This study claims that the center-periphery relations are especially significant for the development of public social care services.

In the center-periphery dimension, the party system can be fragmented along ethnic, linguistic, and religious lines. If the electoral rules allow the societal groups to be proportionally represented or, even under the SMD system, those minority groups are regionally concentrated (cf. Cox, 1997), political parties are aligned along the social cleavages. While political parties need to target public policy on ethnic, linguistic and religious groups if the society is fragmented and the political parties represent each group, political parties can appeal to broader constituencies if the social cleavages are fewer. In other words, whereas the mode of inter-party competition approaches the particularistic one under the fragmented party system, it becomes the programmatic one

when the social cleavages are negligible along ethnic, linguistic, and religious lines. Since elderly care programs tend to be a universal welfare policy, the fragmented party system is unfavorable of those programs while the cohesive party system is favorable of them.

The inter-governmental relations are also crucial for public social care services in the center-periphery dimension. While local governments usually bear the role of service providers, the forms of funding for those services are various across countries. Even though those services are traditionally funded by local governments themselves, the services would be underdeveloped if those governments exclusively rely on their own tax resources. The demands for services are likely to exceed the capacity of local governments to levy taxes. That is the reason why the subsidies from the central government and the fiscal redistribution across local governments are required for the development of public social care services. However, the local governments are less likely to devote their resources to social care services if the constitution prescribes that the local governments should be fiscally independent. Overall, the institutional configuration of inter-governmental relations affects the size of public care programs.

The forms of intra- and inter-party competition complement each other, and the combination of both types of competition determines the predominant mode of voter-politician linkage. In an extreme case, even though all political parties are centralized under the party-vote-oriented electoral system, the mode of political competition would be particularistic if each politician organizes her own party. In the other extreme case, even though one party dominates the administration, the predominant mode of political competition would also be particularistic if the members of the ruling party compete with each other *within* the party under the

personal-vote-oriented electoral system. Thus, the most promising political condition for public social care services is the one-party dominance or the cohesive party system under the party-vote-oriented electoral system.

### **Data and Variables**

This study analyzes the data of seventeen advanced industrialized countries from 1980 to 2000.<sup>2</sup> The dependent variable is the public in-kind benefit expenditures for the aged as a percentage of GDP. Since this study tries to explain the variation of public elderly care services across mature welfare states, the aggregate expenditure levels are obviously a poor measure for what is to be explained. As the previous research suggests (Esping-Andersen, 1990; Allan and Scruggs, 2004), neither frail older people nor their relatives seek public spending *per se*. The aggregate expenditure as a percentage of GDP does not tell how the spending is distributed among those who need care services and what kind of effects it has on social care arrangements in a household. It is unquestionable that care allowance for frail older people has different implications for their own and their carers' behaviors than the state's direct provision of elderly care services. Hence, it is desirable to construct an indicator measuring the program's availability, coverage, generosity, and so forth.

However, the data of public long-term care programs for the aged is much less organized than other cash benefit programs, and then it is almost impossible to create a comprehensive cross-national indicator (see, for example, OECD, 2005). For instance, although OECD Health Data (OECD, 2008) publishes the number of institutional and

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<sup>2</sup> These seventeen countries are composed of Australia, Austria, Belgium, Denmark, Finland, France, Germany, Ireland, Italy, Japan, The Netherlands, New Zealand, Norway, Sweden, Switzerland, United Kingdom, and the United States. Canada's data of public in-kind benefit expenditures for the aged is missing in OECD SOCX (2004).

home care recipients, those data on care service coverage have too many missing points, especially in the 1980s and 1990s, to be used for quantitative analysis. These are the reasons why this study uses the expenditure data with some reservations. The data for the dependent variable comes from OECD (2004) Social Expenditure Database (SOCX).<sup>3</sup> Although the data definition of OECD SOCX is varied across countries and it might be problematic for analysis, this study's dependent variable—in-kind benefits for the aged as percentage of GDP—is highly correlated with the estimation of public long-term care expenditures by OECD (2005: 26).<sup>4</sup> I judge that the quality of data is acceptable for a tentative analysis, like this paper's.

The degree of 'personal vote' has been measured by the characteristics of electoral rules. Shugart (2001: 36-40) creates an index of the extent to which an electoral system forces a candidate to rely on the personal vote, as opposed to the party vote, in order to get elected. The index is based on three components of electoral formulas: ballot, vote, and district.<sup>5</sup> First, the ballot component measures who controls the access to the candidacy or the candidate list. The party vote increases its importance if the party leaders completely control the access to the ballot, and voters have no opportunities to interfere the candidate list presented by the party leaders. Second, the vote component captures how voters cast their vote. While casting a

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<sup>3</sup> Although OECD already published OECD (2007c) SOCX, this study uses the data of OECD (2004) because the former does not include the bulk of the expenditures through German long-term care insurance into 'old-age in-kind benefits'. In addition, although the analysis should cover the data from the 1970s because Scandinavian countries expanded their public elderly care programs in this period, it does not because OECD (2004) SOCX covers the data from 1980 until 2000.

<sup>4</sup> The correlation between public in-kind benefits for the aged as percentage of GDP (OECD, 2004) and OECD's (2005) estimation of public long-term expenditures as percentage of GDP is 0.91.

<sup>5</sup> While Carey and Shugart's (1995) original index is based on ballot control, vote pooling, types of votes, and district magnitude, Shugart (2001: 36) modified this index to take into account 'the locus of party nomination control'.

party-list vote strengthens the party leadership, casting a nominal vote increases the weight of personal reputation against party reputation. There are several intermediate forms between a list vote and a nominal vote. While some electoral systems have ‘flexible lists’ that modify the preordained list order (e.g., Belgium and the Netherlands), some electoral rules allow the votes to be transferred to other candidates (e.g., the single transferable vote system in Ireland). Third, the district component measures the effects of district magnitude. The district magnitude has contrasting effects on the degree of personal vote between the party-based votes and the nominal votes. On the one hand, where voters cast party-based votes, the value of personal reputation declines as the district magnitude rises. The candidates can do ‘free ride’ on the electoral power of the party-list votes when the district magnitude is large. On the other hand, where voters cast nominal votes, the significance of personal reputation goes up as the district magnitude increases. The candidates are forced to compete with their colleagues of the same party when the district magnitude is large. While Shugart’s index does not cover the entire advanced industrialized countries (Carey and Shugart, 1995; Shugart, 2001), Estévez-Abe (2008: 67) extended his index over most advanced industrialized democracies. Since this study tries to assess the effects of personal vote on mature welfare states, it uses her rank order. Table 1 shows the rank order of the degree of Personal Vote across advanced industrialized democracies.

**Table 1. The Strength of Personal Vote**

Country	Rank Order
Australia (1980-2000)	3
Austria (1980-2000)	2
Belgium (1980-2000)	2
Denmark (1980-2000)	2
Finland (1980-2000)	3
France (1980-2000)	2
Germany (1980-2000)	2
Italy (1980-1993)	4
Japan (1980-1995)	6
Netherlands (1980-2000)	2
Norway (1980-2000)	1
Sweden (1980-2000)	1
Switzerland (1980-2000)	2
United Kingdom (1980-2000)	1
United States (1980-2000)	6

Note: While ‘6’ indicates the highest reliance on the personal vote, ‘1’ indicates the lowest reliance on it.

Source: Based on Estevez-Abe (2008, p. 67).

The degree of fragmentation of party system is measured by the fractionalization index of the cabinet. Since this study is interested in to what extent ruling coalition parties try to bring benefits to particular constituencies, it does not use the indicator of the entire party system. Instead, this study assesses the fragmentation of a ruling coalition. The index of fractionalization of the cabinet is calculated in the following formula:

$$F = 1 - \sum_{i=1}^n T_i^2$$

where  $T_i$  = party  $i$ 's decimal share of seats (Cusack, 2003). This formula adds up the square root of each coalition party's ratio in the cabinet, and then subtracts the total from one. When the government is a single-party cabinet, the index takes zero as its value. On the other hand, when the coalition government is extremely fragmented (e.g., each MP has her own party), the index approaches one. This index is better than

just the number of coalition partners because it can distinguish, for example, the fractionalization of a coalition between one large party and two small parties from that of a coalition between three medium-size parties. In the former case, the large party should appeal to broader constituencies than the medium-size party in the latter case. The fractionalization index of the cabinet underestimates the actual fragmentation of a governing coalition when the government is in a minority status, because the minority government requires a support from other parties for its rule. Therefore, I put Minority Government Dummy into regression models. If the cabinet coalition has a minority position in either the lower house or the upper house, this variable takes 1; otherwise, 0. All of these data come from Cusack (2003).

To measure to what extent regional governments are fiscally and administratively autonomous against the central government, I use Huber et al.'s (2004) the index of federalism structure. This index—Degree of Federalism—takes two when a county's constitution adopts strong federalism, takes one when it is weak federalism, and takes zero when the county is a unitary state. Since the regional governments are less likely to expand universal social care services by themselves unless the central government bears their financial burdens, this study expects that the stronger degree of federalism hampers the development of those services.

To estimate the effects of government partisanship I use Leftist Party Cabinet and Christian Democratic Cabinet (Huber et al., 2004). These variables measure the ratio of the parliament seats held by leftist parties and the Christian Democratic Party to all government parties' seats, respectively. As Esping-Andersen (1999) and Korpi (2000) show, the social democratic regime is ranked highly not only in the degree of *decommodification* but also in the level of *defamilialization*. Although it is unclear

why male-dominant trade union movements promote ‘defamiliazation’ of female citizens by ‘commodifying’ them through public social care services, the degree of social democratic party dominance should be put into the models. In addition, while van Kersbergen (1995) argues that the Christian Democratic Party is theoretically unfavorable to social care services because it has ideological inclination to conserve the male-breadwinner/female-caregiver family model and value the principle of subsidiarity, Huber and Stephens (2000) show with empirical evidence that the Christian Democratic Party as well as the Social Democratic Party promotes the expenditures for public social services. Therefore, the effects of Christian democracy on elderly care policy still need to be examined empirically.

Furthermore, to assess the effects of women’s political mobilization on the development of public long-term care programs for the aged, I put Percentage of Women in Parliaments into regression models (Armingeon et al., 2006). It is highly plausible that women’s mobilization influences public elderly care policy. The expansion of female labor force participation certainly creates the demands for social care services by increasing the necessities to externalize unpaid care work that have been carried out within a household so far, and the presence of women in the political sphere probably facilitates those societal demands to be translated into public policy. Therefore, these factors should be taken into consideration when we try to explain the variation of elderly care policy.

To capture the impacts of socio-demographic changes in the recent decades, I put Female Labour Force Participation Rate (OECD, 2007b) and Percentage of the Aged 65 and Over to the Population (Armingeon et al., 2006) into the models. Natural Logarithm of Purchasing Power Parity GDP per capita (OECD, 2007a), Growth of real

GDP (Armingeon et al., 2006), Unemployment Rate (IMF, n.d.), and Consumer Price Index (IMF, n.d.) are added to the regression models to control the levels of economic development, business cycles, and inflation. Finally, all independent variables except macroeconomic indicators are one-year lagged because a typical budgeting process occurs in the previous year of current fiscal year and political factors influence the budgeting politics in the previous year. Table 2 provides the descriptive statistics of dependent and independent variables.

**Table 2. Summary Statistics**

Variable	Country	N	Min	Max	Mean	Overall S.D.	Between S.D.	Within S.D.	Between/Within Ratio
Public In-Kind Benefits for the Aged (% of GDP)	17	360	0,00	2,95	0,57	0,71	0,71	0,22	3,24
Logarithm of GDP per capita (PPP)	17	374	8,74	10,53	9,78	0,34	0,13	0,31	0,40
Consumer price index	17	374	-11,30	21,80	4,29	3,98	1,59	3,66	0,43
Growth Rate of Real GDP	17	374	-6,40	11,70	2,57	2,07	0,84	1,90	0,44
Unemployment Rate (t-1)	17	357	0,20	17,30	6,92	3,50	2,92	2,05	1,42
% of Aged 65 and Over (t-1)	17	374	8,88	17,83	13,92	2,11	1,92	0,99	1,94
% of Female Labor Force Participation (t-1)	17	373	33,40	80,86	60,51	11,00	9,92	5,33	1,86
% of Women in Parliaments (t-1)	17	374	0,00	42,70	16,84	11,42	10,42	5,29	1,97
Minority Government Dummy (t-1)	17	346	0,00	1,00	0,43	0,50	0,27	0,42	0,65
Leftist Party Cabinet (t-1)	17	374	0,00	1,00	0,37	0,38	0,22	0,32	0,69
Christian Democratic Cabinet (t-1)	17	357	0,00	0,96	0,16	0,26	0,22	0,14	1,52
Fractionalization of the Cabinet (t-1)	17	346	0,00	0,82	0,32	0,30	0,25	0,17	1,54
Degree of Federalism	17	357	0,00	2,00	0,52	0,81	0,79	0,24	3,36
Degree of Personal Vote	15	316	1,00	6,00	2,50	1,49	1,59	0,00	N/A

Note:

1. S.D. = Standard Deviation;
2. 'Between S.D.' denotes the standard deviation of cross-country variance;
3. 'Within S.D.' denotes the standard deviation of within-country variance.

### *Method*

This study's quantitative analysis faces various troublesome methodological problems. First, the dependent variable—the public in-kind benefit expenditures for the aged as a percentage of GDP—does not cover the data before 1980. The limitation of available data periods is exceedingly problematic because the countries that currently have the most generous public elderly care programs developed those programs in the 1960s and 1970s and stabilized the expenditure level after the 1980s. As a result, the dependent variable is conspicuously varied across countries but rarely-changing across time. In fact, as Table 2 shows, the within-country standard deviation of the dependent variable is much smaller than its between-country standard deviation. This characteristic of the data does not allow this study to rely on a conventional analytical method in comparative political economy—a unit fixed-effect model—because it only uses the within-country variance of variables.

Second, some political variables this study uses are timely-invariant. Both the degree of federalism and the degree of personal vote are almost the same during the time period the data covers. This feature of the data also prevents this study from utilizing the fixed-effect model because it cannot estimate the effects of time-invariant variables.

Third, the relatively small number of countries in the data does not allow this study to take advantage of a pooled-OLS (ordinary least square) or a random-effect model either. While the random-effect model and the pooled-OLS model are efficient for estimating the effects of timely-invariant variables because they utilize the cross-country variation of variables in their analysis, their estimation of the effects of independent variables is highly likely to be biased because those methods assume that those countries are randomly sampled from the population. This assumption is unrealistic in the context of small-N time-series-and-cross-section studies because it is imaginable that unobservable country-specific effects, such as culture, influence both dependent and independent variables.

Overall, this study faces a serious dilemma between unbiasedness and efficiency. The fixed-effect model is a parameter estimation method putting unit dummies into regression. Since unit dummy variables perfectly absorb unobservable country-specific effects, and then the fixed effect model utilizes only within-country variance of variables, this method gives us conservative but unbiased and consistent parameter estimates. However, the fixed-effect model is inefficient in estimating the effects of time-invariant and rarely-changing political variables, such as the degree of personal vote and the degree of federalism. The problem is that unit dummy variables absorb the effects of those political variables and to prevent them from being significant in fixed-effect models (Plümper et al., 2005; Plümper and Troeger, 2007). Since the fixed-effect model regresses the deviation from the unit means of a dependent variable on the deviation from the unit means of independent variables,<sup>6</sup> it reduces the cross-sectional variance of unit means to unit specific effects, which are expressed by the coefficients of unit dummies. Therefore, the fixed-effect model only uses the within-unit variance of dependent and independent variables, and it cannot utilize their between-unit variance. On the other hand, pooled-OLS and random-effect models cannot distinguish the effects of time-invariant or rarely-changing variables from idiosyncratic country-specific effects, and therefore they tend to bias the coefficients of the variables that are less variant within each county but variant across countries.

Plümper and Troeger (2007) have recently developed a fixed-effect vector decomposition model and try to overcome the tradeoff between unbiasedness and efficiency.<sup>7</sup> The fixed-effect vector decomposition model is a three-stage regression model which decomposes unit-specific effects into the effects of time-invariant and/or rarely-changing

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<sup>6</sup> This is because fixed-effect models can be transformed into the following equation (Plümper et al. 2005: 331):

$$y_{i,t} - \bar{y}_i = \beta_k (x_{k,i,t} - \bar{x}_{k,i}) + (e_{i,t} - \bar{e}_i).$$

<sup>7</sup> In the analyses, I used STATA ver. 10.1 and obtained the ado file of fixed-effect vector decomposition model from Thomas Plümper's personal webpage (<http://www.polsci.org/pluemper/>).

variables and those of unobserved unit-specific effects (see, Plümper and Troeger, 2007: 127-29). The first model estimates the country-specific effects through regressing the difference from the unit-means of the dependent variable on the difference from the unit-means of time-variant variables:

$$Y_{i,t} - \bar{Y}_i = \beta_K \sum_1^K (x_{kit} - \bar{x}_{ki}) + (e_{it} - \bar{e}_i) \quad (1)$$

where  $x$  stands for time-varying variables,  $Y$  for a dependent variable, and  $e$  for the residual of the estimated model. The second model regresses the estimated unit specific effects ( $\hat{u}_i$ ), which are obtained from the first step, on the time-invariant and rarely-changing variables ( $Z_{it}$ ), and then decomposes those effects into observed effects ( $\gamma_m$ ) and unobserved effects ( $h_i$ ):

$$\begin{aligned} \hat{u}_i &= \bar{y}_i - \sum_1^K \beta_k \bar{x}_{ki} - \bar{e}_i \\ \hat{u}_i &= \gamma_m Z_{it} + h_i \end{aligned} \quad (2)$$

The third model reruns the full model not with the country dummies but with the unobserved part of unit effects ( $h_i$ ):

$$Y_{it} = \alpha + \sum_1^K \beta_k x_{kit} + \sum_1^K \gamma_m z_{mit} + \delta h_i + \varepsilon_{it} \quad (3)$$

where  $\varepsilon_{it}$  denotes residuals. By using this estimation method, although it is still susceptible to the omitted variable bias, we can avoid the trade-off between fixed-effect models and pooled-OLS or random effect models. It provides us with the efficient estimations of rarely-changing variables because it utilizes not just within-country variance but also between-country variance. This is an important advantage especially for this study, because the dataset analyzed here has relatively short periods, and many of its dependent and independent variables have a relatively large ratio of between-unit variance to within-unit variance.

This study's strategy to address the methodological problems is to use multiple methods and then check the consistency of the results. It uses all three types of analytical methods: the pooled-OLS model, the fixed-effect model, and the fixed-effect vector decomposition model. While the fixed-effect model is the most rigorous approach, the pooled-OLS model is the most lax one. If the results of regression analysis are similar across various models, those results can be judged as robust.

All of these three methods still require us to address the contemporaneous heteroscedasticity and the serial autocorrelation of residuals. Following the conventional methods in comparative political economy, I use panel-corrected standard errors to model the contemporaneous heteroscedasticity (Beck and Katz, 1995). While Beck and Katz (1996) suggest that modeling the dynamics of a dependent variable through a lagged dependent variable is better than treating the serial autocorrelation of residuals as a "nuisance," it is reported that a lagged dependent variable suppresses the effects of timely-trended variables (see Achen, 2000; Plümper et al., 2005). Furthermore, since the time-series changes of this study's dependent variable is relatively small, less variance is left to the estimation of the effects of other independent variables if a lagged dependent variable is put into regression models. Hence, this study uses the Prais-Winsten autocorrelation correction method to correct the serial correlation of residuals in all three types of methods.

## **Results**

Table 3 presents the results of regression models of the spending on public in-kind benefits for the aged. Among socio-demographic variables, the percentage of old age population and the percentage of female labor force participation clearly show their positive effects on the dependent variable. The variable of population aging has statistically significant effects across all models except Model 5. Although the degree of population

aging does not appear to explain the cross-national variation of public elderly care expenditures in Figure 1, it can be inferred that the population aging has strongly influenced the time-series changes of those expenditures in recent decades. Likewise, the variable of female labor force participation also has statistically significant effects in the pooled-OLS and fixed-effect vector decomposition modes, though it is not statistically distinguishable from zero in the fixed-effect model. As these results suggest, the socio-demographic changes are important driving forces behind the expansion of public elderly care spending in advanced democracies.

The variables of political institutions appear to agree with the hypotheses presented in the theoretical section by and large. Although we cannot assess its effects in the fixed-effect model, the degree of personal vote shows its negative effects on the dependent variable with statistical significance in both pooled-OLS and fixed-effect vector decomposition models (Models 2 and 4). This result indicates that the electoral systems that motivate politicians to cultivate their personal constituency support groups dampen the public expenditures for elderly care services. On the other hand, the degree of fractionalization of the cabinet has statistically significant effects in just one pooled-OLS model (Model 2). However, the coefficients of this variable consistently show its negative effects across all models, and they are still consistently negative even when a lagged dependent variable is put into the regression models (results not shown). Therefore, it can be inferred with a certain confidence that the fragmentation of a ruling coalition suppresses the public expenditures for elderly care programs. Finally, the degree of federalism has negative effects on the dependent variable in both pooled-OLS and fixed-effect vector decomposition models in less than 1% significance level. This result also supports the hypothesis that the presence of fiscally and administratively autonomous regional governments is unfavorable for the expansion of public long-term care programs for the aged.

**Table 3. Regression of Public In-Kind Benefits for the Aged on Explanatory Variables: 1980-2001**

	Model (1)	Model (2)	Model (3)	Model (4)	Model (5)
Logarithm of GDP per capita (PPP)	-0,464 (0,139)**	-0,469 (0,146)**	-0,052 (0,095)	-0,023 (0,034)	-0,072 (0,092)
Consumer price index	-0,004 (0,003)	-0,004 (0,004)	-0,002 (0,003)	-0,008 (0,005)+	-0,018 (0,008)*
Growth of real GDP	0,001 (0,004)	-0,005 (0,006)	-0,008 (0,004)*	-0,005 (0,005)	-0,008 (0,006)
Unemployment Rate (t-1)	0,002 (0,007)	0,007 (0,008)	0,013 (0,006)*	0,005 (0,004)	0,003 (0,004)
% of Aged 65 and Over (t-1)	0,104 (0,024)**	0,049 (0,026)+	0,067 (0,023)**	0,041 (0,008)**	0,011 (0,018)
% of Female Labor Force Participation (t-1)	0,019 (0,004)**	0,03 (0,006)**	0,002 (0,003)	0,008 (0,002)**	0,019 (0,003)**
% of Women in Parliaments (t-1)	0,013 (0,004)**	0,02 (0,004)**	0,005 (0,004)	-0,002 (0,004)	-0,002 (0,006)
Minority Government Dummy (t-1)	-0,025 (0,038)	-0,055 (0,043)	-0,037 (0,033)	-0,004 (0,019)	0,001 (0,026)
Leftist Party Cabinet (t-1)	0,032 (0,060)	0,009 (0,074)	0,037 (0,048)	-0,005 (0,031)	-0,052 (0,050)
Christian Democratic Cabinet (t-1)	0,004 (0,097)	0,131 (0,130)	0,151 (0,105)	-0,08 (0,096)	-0,113 (0,134)
Fractionalization of the Cabinet (t-1)	-0,065 (0,062)	-0,193 (0,094)*	-0,076 (0,066)	-0,056 (0,087)	-0,126 (0,126)
Degree of Federalism	-0,140 (0,035)**	-0,145 (0,030)**	-	-0,232 (0,009)**	-0,212 (0,014)**
Degree of Personal Vote	-	-0,048 (0,024)*	-	-	-0,176 (0,014)**
Residuals	-	-	-	0,992 (0,046)**	0,921 (0,056)**
Constant	2,412 (1,073)*	2,56 (1,070)*	-0,427 (0,714)	-0,018 (0,023)	0,755 (0,054)**
Observations	309	262	314	290	245
Number of Countries	17	15	17	17	15
R-Square	0,36	0,56	0,85	0,87	0,85
Method	OLS	OLS	FE	FEVD	FEVD

Note:

1. The coefficients of country dummies in Model 3 are not shown;
2. OLS = pooled-OLS model; FE = fixed effect model; FEVD = fixed effect vector decomposition model.
3. Panel-corrected standard errors in parentheses;
4. + significant at 10%; \* significant at 5%; \*\* significant at 1% in a two-tailed test;
5. The shaded variables are put into the second stage of fixed-effect vector decomposition models.

The coefficients of government partisanship variables are neither statistically significant nor consistent across models. While the ratio of leftist parties in the cabinet has positive coefficients in the pooled-OLS and the fixed-effect models, it has negative coefficients in the fixed-effect vector decomposition models. Similarly, whereas the ratio of the Christian Democratic Party in the cabinet has positive coefficients in the pooled-OLS and the fixed-effect models, it has negative coefficients in the fixed-effect vector decomposition models. Although this study's regression analysis cannot deny the effects of the social democratic party dominance because the data does not cover the periods when the public elderly care programs rapidly developed and the social democratic party exercised its hefty influence in Scandinavian countries, it seems that government partisanship had no influences on the development of public elderly care programs after 1980.

The effects of women's political mobilization are difficult to interpret. The coefficients of the percentage of women in the parliament indicate statistically significant positive effects in the pooled-OLS models while they have no significant effects in the fixed-effect and fixed-effect vector decomposition models. Although the pooled-OLS models might bias the estimation, the results suggest that women's political representation looks correlated to the development of public elderly care programs in cross-national comparison. However, since it is possible that the state expanded public elderly care programs by employing female workers in the public sector, and it led to higher female labor participation rate and more female MPs in the parliament, the causality between public elderly care spending and women's political mobilization is, at least, vague. The causal mechanism still needs to be developed through case studies.

In sum, the results of this study's regression analysis support the hypotheses

developed in the previous section on the whole. While socio-demographic factors, such as the population aging and the feminization of labor force, influence the expenditures for public elderly care policy as expected, the political institutions also have an impact on the size of those services. The results suggest that the personal-vote-oriented electoral systems and the fragmentation of a ruling coalition impede the expansion of public elderly care services.

### **Conclusion**

This paper pointed out that the current social care literature and the feminist social policy literature do not pay enough attention to political factors generating the cross-country variation of elderly care policy, and offered several political hypotheses to explain the difference among advanced welfare states. Specifically, it argued that the predominant mode of intra- and inter-party competition determines the form of voter-politician linkage in each country, and it has significant implications for the development of public elderly care programs. While the personal-vote-oriented electoral systems promote the clientalistic intra-party competition and therefore impede the development of those services, the party-vote-oriented electoral systems concentrate political power on the party leadership and facilitate political parties to appeal to broader constituencies. The form of inter-party competition also affects public elderly care policy. While the mode of social protection would be particularistic if political parties are aligned with various social cleavages and then a ruling coalition is fragmented, the mode of social protection would be universalistic if social cleavages are not prominent and ruling parties appeal to homogenous constituencies. The bias toward universalistic social protection is conducive to public elderly care services.

The quantitative analysis of the determinants of the public expenditures for elderly care policy showed the effects of political institutions on social care arrangements for the aged. The regression analyses suggest that to what extent the electoral rules encourage the personal vote influences the size of public elderly care expenditures, and that the fractionalization of a ruling coalition also affects the spending on those programs. The results also demonstrate that the form of inter-governmental relations—unitary vs. federalism government—has an impact on the spending on public long-term care programs. The presence of autonomous regional governments against the central government impedes the development of those programs. On the other hand, political partisanship hardly shows impacts on those programs in this study's regression analysis.

The theoretical argument and empirical results of this paper have several implications for the comparative welfare state literature. First, this paper clarified the logic of universalistic social policy development: whereas a decentralized political party and/or a fragmented ruling coalition tend to induce particularistic social protection, a ruling coalition composed of a centralized catch-all party is contributive to universalistic social policy. Since universalistic social policy is not limited to public elderly care programs, this study's theoretical framework has much potential to be applied to extensive social policy fields. Second, although Lynch (2006) already distinguished 'programmatic' from 'particularistic' political competition, this study pointed out the institutional foundation behind these different types of political competition. The characteristics of electoral rules and the features of party systems structure the form of political competition. It is my future tasks to verify the argument exemplified in this paper with case studies and extend it over the broader areas of social

policy.

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