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Age, Class, Politics, and the Welfare State, by **Fred C. Pampel** and **John B. Williamson**. Cambridge: Cambridge University Press, [1989] 1992. 199 pp. \$34.50 cloth. ISBN: 0-521-37223-2. \$15.95 paper. ISBN: 0-521-43791-1.

Old-Age Security in Comparative Perspective, by **John B. Williamson** and **Fred C. Pampel**. New York: Oxford University Press, 1993. 304 pp. \$49.95 cloth. ISBN: 0-19-506859-9.

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There are numerous books and articles that compare social welfare systems along different dimensions. In most, two or three countries are compared, one particular theory is tested, or a conceptual comparative framework is developed. Pampel and Williamson, in their 1989 book (now available in paperback) and, in particular, 1993 work, significantly enrich this body of literature. They avoid monotheoretical as well as monocultural traps and provide a good synthesis of several theoretical approaches.

In the 1989 volume, the authors give a thorough summary of theories about the function of the welfare state. They review and critically discuss monopoly capital; social democratic, class-based, and interest-group theories; and issues that are crucial to addressing their two central questions: What

helps us understand the growth of welfare spending? How are we to understand the effects of welfare spending on income inequality?

It is noteworthy that the authors do not consider education to be in the realm of social welfare spending, even though the "Anglo-Saxon" (in contrast to the Bismarckian) approach to welfare treats both education and social insurance as integral parts of social policy (Heidenheimer 1981). By contrast, the authors argue "that educational expenditures are regressive, contribute to equality of opportunity rather than results, and are justified by meritocratic rather than egalitarian values. In contrast, welfare transfers are designed to be progressive in contributions and egalitarian in results" (1989, p. 17). In reality, it would seem that education and welfare transfers are both mixed: German-type social (pension) insurance, typical for the continental welfare state, is neither progressive in contributions nor egalitarian in results. Nor does education necessarily fall into the opposite cells of a four-fold scheme. Might some (Anglo-Saxon) Beveridge-Titus "ideal-type" overcome the necessity to make the distinctions that are suggested by "real types" in the real worlds of welfare?

To explore such matters, Williamson and Pampel perform a comparative analysis of advanced industrial democracies using aggregate cross-national data from UN, ILO, and World Bank sources. Unfortunately, all countries are thrown into one massive data pool for these analyses. Calculations do not control for country deviation, nor is contextual (historical) information taken into account. Given this analytic shortcoming, it is impossible to know what to make of the sophisticated statistical models that give some evidence in support of all existing theories about the authors' first question. Still, the number of the aged and the age structure are convincingly shown to be the most important influences on the growth of modern welfare-state spending. Public policy, then, reflects not only the conflict between classes and class-based political parties but also mirrors divisions that cut across class boundaries. Nonclass interest groups (here, the aged) are central to the growth of the welfare state. This finding also informs the authors on their second key

question, since the amount of money spent for the aged limits the redistributive consequences of social welfare spending. Given the income-based nature of most systems, pensions and medical benefits can do little to redistribute income to the lower classes; instead income transfers are mainly within classes and across generations.

The 1993 volume sets a different and more ambitious task for itself. First, it attempts to provide an integrative view of the validity of competing explanations of old age security policy by considering the national and historical context of program development. Second, it studies both advanced industrial and Third World nations. And third, it employs both qualitative and quantitative analyses. The historical "qualitative" studies (of the United Kingdom, United States, Germany, Sweden, India, Nigeria, and Brazil) presented in chapters 2-8 challenge conventional class-based (social democratic and neo-Marxist) views of public pension policy development and suggest that the state and its structure are important determinants of pension expansion—not in isolation from class and age groups, but in combination with them. The case studies of Third World nations, while showing their qualitative differences from the advanced industrial economies, provide evidence for the interactive argument. The authors thus suggest treating the different theoretical approaches as complementary rather than competing. Across time within a country, and across countries, the relative utility of different theoretical perspectives varies. National and historical contexts do indeed make a difference.

The quantitative models (Ch. 9) are based on two assumptions. For advanced industrial democracies, the authors assume that the influence of class groups increases with corporatism, while the influence of the aged population decreases with corporatism. For Third World nations, on the other hand, they assume that economic and demographic characteristics are more influential in democracies than in nondemocracies. For the advanced industrial democracies, data on pension spending for eighteen nations over the years from 1959 to 1980 are analyzed; for the Third World countries, data on thirty-two nations every five years from 1960 to 1980 are used. The independent variables roughly

match concepts that are central to industrialism, neopluralist, social democratic, and neo-Marxist theories. The findings support the conclusions of the qualitative case studies. The institutional context conditions the effect of variations in class formation, age structure, and age and class resources on pension spending. Both class and demographic theories may be correct, but each must be delimited in its application to particular contexts or nations. In sum, the 1993 volume contributes substantially to welfare state research and moves significantly beyond previous quantitative research which assumes that the effects of societal demand are the same in all societies. At the same time, the authors' approach raises some interesting problems that warrant further investigation.

The first study, for example, shows that "ascriptive" demographic characteristics are central traits that cross-cut class interests. But why were such ascriptive characteristics as gender and family (or household) status not taken into account? As long as there is a gender gap in voting behavior (at the interest-group level), and as long as most of the aged are women (age effects may be disguised gender effects), more extensive analysis would seem necessary. It also would have been useful to have more discussion on why families and the family structure were not taken more seriously in the analyses. Future studies might profitably address such matters (see Therborn 1993).

More important, the basis for the selection of countries is troublesome. In 1989, low, middle-income, and nondemocratic nations were explicitly excluded from the sample. One might question these criteria: The welfare state is not necessarily democratic (shown by its German origins in Bismarck's time), nor is it necessarily a feature only of high-income nations (as the four little East Asian "tigers" or the former state socialist societies suggest). In the 1993 volume, the selection of countries remains Western and Anglo biased. The four Western countries studied are compatible with a Esping-Anderson regime selection as refined by Castles and Mitchell. Three countries are either English speaking or virtually so (Sweden). To turn the language argument on its head: If one recalls the decades of argument about the "Japanese challenge,"

why is it that in 1993 this country still deserves no seat at the table of "welfare regime" comparisons? Japan developed a variant of the "welfare society" shortly after World War II and surely represents an additional type of welfare regime—one that should not be confused with any of the four that receive the bulk of the attention in this work. Moreover, Japan reveals a great deal about old-age security (Gould 1994). A case might also be made for including France, whose conservative regime traditionally had a special—and thus especially interesting—emphasis on gender and family which, to my knowledge, is not found in any other country.

Similar questions could be raised about the selection of the three Third World countries. Here, the basis for choosing these countries is explained in passing (1993, p. 20). But why not include the four little tigers from East Asia and their "oikonomic" (Jones 1991) welfare states? Are regime types governing country selection? Which hidden curriculum really controls selection?

Although these matters raise some questions about this work, its novel contributions by far outweigh such problems. The combination of quantitative and qualitative methods, the inclusion of Third World nations, the compelling test of different theoretical approaches, and the presentation of concepts that synthesize different theoretical approaches make these books welcome contributions to the field of comparative research on welfare states. The books also should be very useful teaching devices.

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