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The Irish welfare state: closer to Boston than Berlin?

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Introduction

In many western countries the concept of the welfare state is not, in itself, in crisis. This is because the idea of supporting their own society-members is not up for debate, however, the way of providing that support is. Most countries in Europe have a common desire to reduce their social services to exculpate the state from the financial stresses and strains caused by the dramatic rise in public and social expenditures during recent years. For instance, social expenditures from 1960 to 1975 in the Netherlands have increased to nearly triple from 11.7 to 29.6 per cent (George and Taylor-Gooby 1996, p.5). One of the main reasons is the pressure caused by the acute decline of the birth-rate with a simultaneous boost of the anticipated average lifespan due to the continual improvement of health care. In addition to these demographic changes unemployment has increased again in several western countries, as "economic conditions in many countries began to deteriorate" (ibid pp.4-5). Therefore more people are in need and are dependent on the social benefits of the state to support their living wage than in the early years of the Welfare State. This period of development, between the 1950s and 1970s, is referred to as 'The Years of Welfare Optimism' (ibid p.2). These current circumstances are playing into the hands of the advocates of Neoliberalism, a rethinking and reassertion of classical liberalism[1].

[1] Classical liberalism is characterized by enlightened self-interest, rationality, and free choice combined with a minimum of intervention by the state in the life of individuals (Scott and Marshall 2005, p.361-2; p.443).

In order to classify the Irish welfare state in the context of one of the three welfare regimes identified by Gøsta Esping-Andersen, it is necessary to know to what extent Neoliberal elements are detectable in the Irish welfare state. Esping-Andersen developed three categories of welfare states in his famous book 'The Three Worlds of Welfare Capitalism': conservative/corporatist, liberal/residual and social-democratic welfare regimes. All of them are aware of their responsibility to provide services to their population to secure a basic living standard. To focus only on the amount of spending of one state is not in-depth enough; the modality and the quality are also important, and perhaps are more important aspects than spending alone (Esping-Andersen 1992, p.103). A country that has less social security spending than another country can offer better service and support to the recipients of benefits by having a better concept (e.g. measures of integration into the labour market).

The preservation of status differentials and traditional family patterns[2] are the main elements of the first, or corporatist, regimes. The market is seen as the provider of welfare and is steered by the state. The second model can be characterized by means-tested assistance, modest universal transfers or modest social insurance plans and a minimalization of decommodification[3] effects. The entitlement rules are often very strict and therefore associated with stigma, because people are forced to reveal their whole lives, including their property, to eventually gain benefit payments. Additionally, this social stratum is decidedly hindered in their efforts to re-enter the labour market and to, therefore, re-enter a life independent from the welfare state. This is often incorrectly labelled as a weakness or even as parasitism by people situated in

[2] i.e. the construction of the women 'as the normal 'carers' whether for children or for elderly relatives' (Wilson 1993, p.156).

[3] Decommodification describes the reduction of dependency for individuals from the labour market through social transfers from the state.

higher, more privileged, social classes. The third form is a kind of an idealistic regime because it promotes an equality of the highest standards by incorporating strata and classes under one universal insurance system. It therefore connects liberalism and socialism (Esping-Andersen 1992, pp. 111-3).

The Irish welfare state is not easy to classify according to Esping-Andersen's categories. It moves between two models: the global Neoliberalism system represented by the USA and the universal or corporatist system represented by Germany. In 2000, Mary Harney (at that time Tánaiste and Minister for Enterprise Trade and Employment), claimed that "geographically we (the Irish state) are closer to Berlin than to Boston. Spiritually we are probably a lot closer to Boston than Berlin".

In response to this statement the position of the Irish welfare state within this context will be discussed and analysed in order to come to a satisfying conclusion. This will be realized through situating the welfare state of the United States of America as an example of a liberal welfare regime, on the one hand, and Germany as a corporatist welfare regime on the other hand. Following this, the Irish welfare state will be introduced and classified. In conclusion, the social implications of being positioned 'nearer to Boston than Berlin' for wider society, and for special groups or individuals within the Irish welfare state, will be discussed.

The corporatist welfare state of Germany or the 'Middle Way'

The German social system is known for providing a 'safety-net' (Wilson 1993, p.141). Social Security was drawn up on many features of the policies implemented by Bismarck making Germany the first country to establish a public welfare system.[4] Bismarck created a model that was adopted by a substantial number of other countries. Actually, the aim of Bismarck was to 'bind the new working class into the new German Empire' and to maintain the social peace (George and Taylor-Gooby 1996, p.32; Wilson 1993, p.141).

In the German system, social security is calculated proportionally from the former earnings of each person - a principle of status maintenance, which is a main element of a conservative welfare regime. Through the Social Security System the status differentials of the people are conserved and the income inequalities linger on: People who earned high wages will get high benefits when they become unemployed. That is why women acquire lower entitlements to social security because they are predominantly concentrated in lower-paid and service-sector jobs. The insurance contributions for annuity, health, unemployment, accident and nursing insurance are made up of payments of one half each, from the employee and his or her employer (Wilson 1993, pp.141-55).

The monthly dues are transferred through the 'pay-as-you-go' system to the people who need the financial support. In each case, the current working generation is solely supporting the recipients - the non-workers and the sick.[5] For those people who do not have an income for a longer time the state provides Social Assistance after arranging a family means-test. In this it represents the "*poverty-line* or minimum standard of living" (ibid p.141).[6]

[4] In 1883 health insurance was implemented and, in 1884 accident insurance was implemented.

[5] Bundesministerium für Arbeit und Soziales (2008), *'Ratgeber zur Rente'*, p. 7, available: http://www.bmas.de/coremedia/generator/1856/property=pdf/ratgeber__zur__rente__258.pdf (accessed 14 Oct 2008).

[6] In 2005, the government decided to combine the unemployment assistance and the welfare aid for indigent employable persons (now called unemployment benefit II or 'Hartz IV').

Germany is also known for its consistent enforcement of the model of social market economy. Within this concept the state is mainly responsible for designing the regulation framework of the economy. This free-market economic system is regarded as the approach of the economic and social policy of Ludwig Erhard[7], the so-called 'father' of the social market economy.

Until the 1970s social expenditures, especially the social security transfer payments, as a percentage of gross domestic product (GDP) were increased to the highest of all OECD nations (Organisation for Economic Co-operation and Development). 'In spite of the oil crisis and the breakdown of Breton Woods, Germany "has continued to be a big spender on welfare" in comparison to other OECD nations (Lawson 1996, pp. 36-38).

Unlike Margaret Thatcher, in the UK, and Ronald Reagan, in the USA, who stood for the emergence of the 'New Right' ideology of personal responsibility[8], the Kohl government claimed "…not the reduction but the *redirection* of state intervention …" would be the best solution to the economic, demographic and social changes (Lawson 1996, pp.37-8). The reunification of West Germany and the former German Democratic Republic (GDR) on the 3rd of October 1990, after the fall of the Berlin Wall, caused additional financial stresses and strains for the reunited Germany because of the "disastrous ecological and infrastructural heritage of communism".[9] As a result, the "fiscal crisis" of the

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[7] Ludwig Erhard (conservative Christian Democrats (CDU)) was Federal Minister of Economy during 1949 – 1963 afterwards becoming Federal Chancellor up until 1966.

[8] This ideology comes along with the Nozickian concept of the minimalist state, which emphasized a limited role of the state and the individual's responsibility for their own misfortunes (Welsh and Parsons 2006, pp.50-1).

[9] The state had also to face, that over 4 million of the 10 million former workers in East Germany became unemployed, while unemployment also rose in West Germany (Lawson 1996, p.40).

German welfare state was born (Wilson 1993, pp.159-61). Since then a steady rise in long-term unemployment, especially among foreigners[10], became one of the biggest problems which faced social policy (Lawson 1996, pp.45-6). In spite of everything, the Kohl government remained in power until 1998, "anchored in the German middle way".[11] They decided to modify the welfare state by increasingly emphasizing 'self-responsibility' (Lawson 1996, pp.46-7). However, they did not move away from the core concept of a welfare state but set about dealing with the emergent issue of the increase in unemployment.

The Neoliberal welfare state of the USA

The New Deal between 1933-1940 (especially the Social Security Act of the 14, August 1935)[12], implemented by Franklin D. Roosevelt, can be classified as the origin of the welfare state in the USA. Three years after the Great Depression in 1929 a nationwide, compulsory system of old-age pensions and unemployment insurance was instituted (de Swaan 1998, p.208). It seemed that Roosevelt 'had struck the right balance between government and private enterprise' (Badger 1989, p.2).

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[10] During the time between the 1950s up until the middle of the 1970s 'guestworkers' from foreign countries were allowed to work temporarily in West Germany, however, a lot of these workers stayed in Germany. During this time, their claims on social benefits were comparatively minimal. But since the early 1970s the 'growth of a new ethnic minority population' had to be faced. In the early 1990s, over 6 million foreigners lived in Germany (Lawson 1996, pp.34-40).

[11] A middle way 'between the extremes of Scandinavian social democratic welfare capitalism and political economies in which centre-right, or rightist tendencies, dominate' (Lawson 1996, p.31).

[12] The Social Security Act established a system of Federal old-age benefits which empowers several States for making adequate provision for public health, aged persons, child welfare and so on. This Act formed the basis of the American welfare state (Harrison 1997, p.262).

In 1956, disability benefits were enacted. Nine years later health insurance for the elderly (Medicare)[13] and for welfare clients (Medicaid) were introduced (de Swaan 1998, p.209). Until the 1970s the policy of Keynes was favoured.[14] The ultimate turning-point was demonstrated by the election of Ronald Reagan in 1981 (Badger 1989, p.4). Reagan's spending cuts were seen in reduced unemployment insurance benefits and in curtailments on food stamps, school lunches and medical aid. In short, this was the beginning of the roll back of the welfare state, a structure that did not even exist in the traditional sense. After a part approximation of the European welfare states, the American welfare state "fell far short of a universal, consistent and comprehensive system" (Harrison 1997, p.274).

The United States does not now have a comprehensive welfare state because many characterizing features of a modern welfare state are "either absent or under-developed", such as family allowances and medical insurance. The welfare state which was established in the period of FDRs New Deal is approximately today's welfare state because the basic structure is unchanged (Harrison 1997, pp.249-50).

In the 1960s and early 1970s a welfare expansion, embedded in the 'War on Poverty'[15], began. But the focus was laid on the prevention, rather than on a serious alleviation of poverty. Since then the U.S. welfare state "remained decidedly incomplete", especially with regard to the absence of health insurance (except for the elderly). Many stayed poor, exposed to harassment and

[13] A national health insurance has never been implemented in the USA.

[14] Keynesian economies support active state intervention in the economy by stimulating aggregate demand (Scott and Marshall 2005, p.334).

[15] Lyndon B. Johnson proclaimed the 'War on Poverty' in 1964 because of difficult economic conditions and especially because of the high national poverty rate of around 19 per cent.

dependent on public assistance, because social insurance was linked to an individual's work. Reagan argued that the welfare state would erode "poor people's will to work" and that the renunciation from liberalism had created a condition of "welfare dependency". This is why critics of the welfare state often refer to it as the "welfare mess" (Harrison 1997, pp.270-3). The refusal to inherit the European welfare model is deeply rooted in the emphasis on individualism in the United States of America since independence in 1776, as opposed to the collectivism represented by western European countries. Therefore the American welfare state is characterized by a free market, low taxes and a strong restriction for social services.

The Irish welfare state: more neoliberal than corporatist?

From the 1960s on, Ireland started investing heavily in welfare. In the 1970s, Ireland introduced comprehensive social insurance schemes, also including retirement pensions and invalidity support. The membership of the GATT in 1967 and the EC in 1973 followed (linked with many economic advantages), which helped Ireland to enter the global economy. But just as in the 1980s, the authors of social and economic policies were forced to reconsider because of the incipient unemployment, record levels of emigration and the economic crisis (McLaughlin 1993, pp. 213-5; p. 232).

Eugene McLaughlin characterizes the Republic of Ireland as an Catholic corporatist welfare regime because of the dominance of the Catholic Church which started implementing corporatist elements since the late nineteenth century (ibid p.205). Subsidiarity allows the state to intervene because the family 'was the 'first and vital cell of society' (ibid p.206-7). He continues, "The integrative ideologies of Catholicism and nationalism shaped the Irish state and the national identity into an inclusive, culturally homogeneous, conservative one" (ibid p. 209).

To understand the welfare regime of the Republic of Ireland it is essential to explain the 'Celtic Tiger'. This is the name for the period of rapid economic growth in the Republic of Ireland during the beginnings of the 1990s until 2001; with a second but shorter economic revival which began in 2003 and ended four years later in 2007. It is especially important in the context of the worldwide financial crisis which is affecting Iceland and Ireland particularly badly. Even with the incomparable positive developments brought during the 'Celtic Tiger' boom years, since then the property market has caved and the building sector is ailing. The unemployment rate has also doubled to more than 8 per cent (in October 2008 it was ca. 6.6 %). Also the third largest bank, Anglo Irish Bank, had to be nationalised. On the 21st of February 2009 the tensions and the anger of the Irish population had become obvious: around 100,000 people in Dublin protested against the savings plan of the government as reaction to the crisis. David Begg, secretary general of the Irish Congress of Trade Unions (ICTU), said that the economy was destroyed by an "elite", who have not been called to account (Klimke 2009, p.9).

But during the 'Celtic Tiger' years, Ireland experienced the 'fastest growing economy' in the OECD; predominantly because of 'cutting back on public spending and limiting wage rises'. The former government declared that fiscal stability and social partnership were the 'critical pillars' in reanimating the Irish economy. Still in the late 1980s, Ireland had, with 10 per cent in 1981 and 17 per cent six years later, one of the highest rates of unemployment in the EU (Allen 2000, pp.9-12). The workforce has grown from 1,354,000 in 1991 up to nearly 2,000,000 in 2005, while the number of employed people rose to 1,990,000 people (Healy and Collins 2006, p.225). Still in 1992, the unemployment rate of Ireland was 17.4 per cent and as such the highest in the EU (McLaughlin 1993, p. 217).

Therefore big social cuts were made under Fianna Fail, something which also stood for a radical about-turn of that party.[16] The aim of the newly taken Neoliberal economics, reflected through the politics of Thatcher, Reagan and less of Kohl, was to 'roll back' the damages caused by state interventions into the market based on Keynesian analysis[17], which has formed most of the Western societies for three decades after the Second World War. After 1987 an agreement with three Neoliberal arguments emerged: Firstly, public spending had to be constricted. Furthermore tax cutting should be realised and wage costs had to be decreased while "choking" union power (Allen 2000, pp.13-5). Additionally, the economy began to grow because of the key factor of foreign direct investments. Big companies needed a 'European base' because Europe was seen as a kind of battlefield between the global giants represented by the NAFTA (North American Free-Trade Agreement) and the ASEAN (Association of Southeast Asian Nations). Ireland was lucky because a lot of US companies settled on the green island encouraged by the "spectacularly low rate of taxation on corporate profits" (ibid pp.22-4). Today Ireland has the highest level of direct US investments per manufacturing worker of any country in Europe (ibid p.27) – a situation which may change rapidly under the newly elected American president, Barack Obama's Stimulus Package.

While the profits, especially the industrial profits, have grown fast (between 1990 and 1997 they increased by 144 per cent), the wages have been kept in check. The Neoliberal revival had lead to the biggest economic boost of Ireland but the corpus of the population also experienced the "scars of stress, overwork

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[16] For example hospital wards were closed and more than 20,000 public servants became redundant; nearly 20,000 people demonstrated against the closure of Barrington's Hospital in 1987 in Limerick. In 1980, Ireland had the highest rate of admissions within the OECD-countries, until 1993 when it became one of the lowest (Allen, 2000 p.13; pp.98-9).

[17] Keynesian economies believe in active state intervention in the economy by stimulating aggregate demand (Scott and Marshall 2005, p.334).

and low pay" (Allen 2000, p.60). However, Ireland became the first EU member to adopt a global poverty reduction target known as the National Anti-Poverty Strategy (NAPS) in 1997 (Layte et al 2004, p.163).

In addition, "social partnerships" became the official ideology of the Irish state (Allen 2000, p.35). That means that between the government, the trade unions, and the main employer groups, voluntary agreements are negotiated. The implementation of social partnership, as a result of the inflexibility of wage-settings due to rising global competition, explains, for some commentators, the success of the 'Celtic Tiger'. Herein, the model of "competitive corporatism" emerged, which "combines adaption to competitive needs with an explicit political commitment to social protection and social equity" (Hardiman 2000, pp.286-7). The first three social partnership agreements were negotiated by the so-called 'traditional' social partners of government, employers and the trade unions but pretty soon the government supported the inclusion of the community and the voluntary sector. Since Partnership 2000, many new partnership-based working groups on diverse policy issues developed. The ambitions of the social partnerships for more policy autonomy were placed as a potential problem between them and the government (ibid p.307).

Since 1987 six different agreements have been implemented (i.e. 1987 – 1990 Programme for National Recovery (PNR)). During all of these trials the unions accepted more and more the 'contours of the capitalist labour market' because of the heavy pressure of the Irish State (Allen 2000, p.108). The State tried to rearrange the union movements itself to make them more compatible with "the needs of Irish capitalism", i.e. to "rationalise" them by encouraging them to merge, because by 1970 there were ninety different unions in Ireland (ibid pp.112-5). In addition to that, the Industrial Relations Act 1990 was introduced which seriously restricted the rights (mainly the potential of militancy) of employees by making the calling of political strikes more difficult. Nevertheless, several union leaders tried to work together with the government, if only to avert, as far as possible, the "New Right"[18] which included privatisation and the introduction of Thatcherite policies (ibid pp.113-6).

Yet this kind of welfare regime was detached by Neoliberal elements. This is confirmed by the latest developments in the educational and the health care system. Education is a right of everyone rather than a privilege for the few, but, in Ireland the illusion of having a choice between schools or universities is created. In reality, there is no choice because the education system is embedded in the Neoliberal model, which treats education "as just another service to be delivered on the market to those who can afford to buy it" (Lynch 2006, p.299). Besides the diversified tuition fees and the high entrance limitations at Irish universities the move to also create global league tables for universities is a further indicator that "market values have been incorporated into the university sector" (ibid p.303).

By focusing on the impacts of the Irish health care system, it is becoming clear, that it is not that effective in comparison to those of the other EU-members, because Irish people have one of the lowest life expectancies.[19] Additionally Ireland has the third highest infant mortality rate (O'Shea and Gillespie 2006 pp.280-1). A lot of societies have in common 'that health care resources and benefits should be distributed in some fair way'. But in Ireland it appears that poor and excluded people get sick more often and die younger. In 2002, only

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[18] This philosophy, as one of the many divergent strands within liberalism, emphasizes economic freedom on the one hand but wants to reach a wider government intervention in moral life on the other hand (Scott and Marshall 2005, p. 361-2).

[19] In 2002 life expectancy for males was 75.2 years, and 80.3 years for females.

29.6 per cent of the population possessed a medical card which is a sign for an "overall rise in income levels" (ibid pp.283-4).

These processes to make the universities more market-oriented by enforcing elitism and to excavate the health care system is a result of the big influence of the American direct investment during the time of the 'Celtic Tiger' and pushes Ireland consistently along nearer to Boston than to Berlin.

Conclusion

The position of the Irish welfare state within the welfare regimes of Esping-Andersen could be described as ambiguous (Payne and McCashin 2005, p.2). It is seen as a "Catholic corporatism" welfare state or as a "developmental welfare state" (ibid pp.2-3). But more important is the suggestion, that there exists the contradiction of Ireland moves towards "greater Neoliberal flexibility while it has *at the same time* become more neo-corporatist" (Boucher and Collins 2003, p.297). Firstly, Ireland's welfare state can be characterized as an "uneasy mixture of corporatism and liberalism" (Cochrane and Clarke 1993, p. 15). It combines influences from Britain (especially Neoliberal Thatcherist policies), America and Europe and tries to balance "American-style individualism and European forms of collectivism" (Boucher and Collins 2003, p. 297). Although the influence of the predominant welfare states in Europe and the European institutions including the influence on Irish legislation to regulate i.e. the labour market has increased and the element of social partnership is pleading for the corporatist model[20], the Irish welfare state has indeed "landed on the side of America … than on the side of the European social model" (ibid pp.309-10). Moving towards two different models is actually not possible, because in reality

[20] Indeed the partnership processes in Ireland differ from 'traditional neo-corporatism in a number of ways' and are operating primarily in the service of Neoliberalism (Boucher and Collins 2003, p. 305.).

the Irish welfare state is consistently moving further towards Boston, including some of its universal features.

In 2001, Ireland's social expenditure of its GDP was only 14.5 per cent compared to 25 per cent in liberal, 30.8 in corporatist and 32.0 per cent in social democratic countries (Payne and McCashin 2005, p.5). Additionally, Ireland's social assistance for the unemployed is quite low which acts as an indicator for a liberal welfare model emphasizing the individualism in comparison to the continental European welfare states. This refers to the Irish strategy in reducing unemployment (while the percentage of working poor has increased from 3 per cent in 1994 up to 10 per cent in 2004), not to provide more welfare for their citizens (Boucher and Collins 2003, p.212). That several liberal-individualist patterns had also taken "root in Irish public attitudes" is proved by nearly 70 per cent, who agreed that hard work is the difference between being poor and well-off (Payne and McCashin 2005, pp.15-6). This is the result of a study about 'Welfare State Legitimacy: The Republic of Ireland in Comparative Perspective' from the Geary Institute which classified answers into one of the welfare models produced by Esping-Andersen. The adoption of American-style work practices by Irish companies, based on limited worker participation and the conviction not to intervene in the market is another advocate for Ireland being a Neoliberal welfare state (Boucher and Collins 2003, p.308).

Therefore, the classification of Ireland as a predominant Neoliberal welfare state especially impacts on the weak groups within the society due to the high poverty and inequality rates. In 1987 Ireland's poverty rate before taxes / transfers was incredibly high with nearly 40 per cent (Pontusson 2005, p.171). Still in 2006, 17 per cent of the population are 'at-risk-of-poverty' while 6.9 per cent are in 'consistent poverty' (Combat Poverty 2009, p.1).[21] Ireland also has high levels of inequality in income compared with the other OECD countries. In the mid/late 1980s only the USA had a higher Gini coefficient and therefore a higher inequality of income distribution.[22] In short, educational opportunity and risk of poverty has remained 'stubbornly high' in spite of the economic boom (Nolan et al 2004, p.352).

"If the classless Ireland was a myth in the past, it has become a hollow joke in the Celtic Tiger" (Allen 2000, p.1). Class distinctions and, to say it in the words of Karl Marx, even class struggle, is gaining in relevance and a lot of Irish citizens are questioning the 'growing disparity of incomes' although it seems that official Irish society is barely aware of the reality of class (ibid p.2; p.58). The term 'social exclusion', especially in Ireland, has recently emerged into prominence (Nolan and Maitre 2004, p. 347). The Neoliberal revival has lead to the biggest economic boost of Ireland but the corpus of the population has, as noted, experienced the "scars of stress, overwork and low pay" (Allen 2000, p. 188). It is not for nothing that Ireland was the second most unequal country on the planet in 2006. This is a distinction that is likely to hold in the face of processes which are pushing Ireland consistently nearer to Boston, in spite of some universal features shared with central European models.

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[21] However, Ireland became the first EU member which adopted a global poverty reduction target which was named the 'National Anti-Poverty Strategy' (NAPS) in 1997 (Layte et al 2004, p.163).

[22] This coefficient is a measure of inequality of income distribution or inequality of wealth distribution. (Nolan and Maître 2004, pp.157-8)

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