

Theses of doctoral (PhD) dissertation

**UNIVERSITY OF DEBRECEN
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**Global challenges on the Welfare States:
An Institutional Analysis**

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1. Introduction of Goals and Objectives

Historical events have the ability to repeat themselves and trigger future events. The past must be investigated in order to gain knowledge and lessen uncertainty about the future. In terms of the global economy, knowing the history of human reproduction and collaboration is crucial to finding solutions. Throughout history, individuals have been cared for primarily by tribes, ethnic groupings, and, subsequently, families. The kings' "parental role" was akin to giving society amenities, and earlier royal support paved the way for succeeding welfare states. This historical component enabled welfare governments to appeal to the public as a supplementary form of familial control. Prior to the establishment of the welfare state, there was a lack of caregivers to deal with daily risks.

The development of a contemporary welfare state could possibly be traced back to when Bismarck established insurance plans, which quickly swept throughout countries and were partially or completely implemented, depending on the region. The post-World War II period was the pinnacle of welfare states, when governments quickly boosted social welfare services and began to meddle in markets more aggressively. Later, in the 1970s and 1980s, two oil shocks struck the global economy, bringing the golden era to an end. Following that era, a restructuring phase for welfare states began, which lasted until the 1990s; subsequently, one of the most significant global economic crises, the 2008 crisis, struck, affecting welfare states as well.

Esping-Andersen (1989, 1990) authored one of the most widely used pieces of literature on welfare state standards, categorizing them into three types: Liberal, Social Democratic, and Conservative welfare states, and this typology has driven my study. Social Democratic or Nordic welfare states have a high level of decommodification, social trust, strong government expenditure, high tax ratios, and a largely egalitarian community. In comparison to other clusters, they have the greatest welfare component ratios.

Sweden is a typical example of a Nordic welfare state while also being distinct from others. Throughout Swedish history, ruling parties focused on and pushed social benefits; it was also the first Nordic country to support the Prussian Chancellor's plans. All of these

aspects make Sweden a suitable topic for qualitative investigation in order to get preliminary insights into welfare states.

A welfare state has been attributed to almost every economic downturn and crisis; nevertheless, there was one exception: the 2008 global crisis. It was the first time that a welfare state was considered a remedy rather than a cause of an economic depression. Welfare states are evolving, and new aspects can be added or eliminated from the pure model, as seen by key economic events such as the 2008 global financial crisis. After WWII, welfare provisions were increased to boost state intervention and control over economies. However, there are few scholarly investigations on the impact of the 2008 crisis to determine how state intervention changed and the reasons behind that change. With this study, I posed the following question:

How did state intervention change in Nordic welfare states in response to the 2008 global financial crisis, and what role did welfare components play?

The current study's prospective findings may help produce relevant research topics, ideas, and concerns for future studies. To do this study, it is necessary to understand the issues that welfare states experienced and how they dealt with them, as well as how the global economy would react to the same crisis and how welfare states would reflect on it. Furthermore, the institutional study of welfare states is critical because learning from the past may be employed in the future to prevent repeating mistakes and to implement more efficient policies. The gap in the academic literature might be filled by this comprehensive and theoretically oriented research.

2. Literature Review

One of the purposes of institutions is to guide people. Additionally, as some scholars have stated (North, 1990a; Voigt, 2019), to minimize uncertainty by expanding individuals' perspectives on time and creating incentives to specialize, resulting in a more extensive level of specialization in employment, Thus, institutions can contribute to higher living standards. From this point of view, institutions can be defined as widely recognized rules utilized for recurring engagement scenarios that include a disciplinary procedure in the event of a violation. The rule generally constrains conduct; however, not all behavioral constraints are rules, such as the law of gravity (Voigt, 2019).

A welfare state is an institutionalized conception that comprises components working together to achieve societal objectives. There are several ways to define a welfare state, as well as various viewpoints on its ultimate objective. My study is within the scope of institutional analysis. The institutional approach is a powerful tool for connecting disparate features to comprehend multifaceted, complicated concepts such as welfare states. Institutions, as well as their functions and guiding principles, are essential components of every system.

A welfare state is a complex phenomenon requiring a framework that brings together political economy, institutional economics, welfare economics, sociology, and other disciplines. As a consequence, studying welfare states requires a variety of approaches and methodologies.

One of the most often referred pieces of literature is by Esping-Andersen (1989, 1990), which has been essential to my research. This typology divides welfare states into three categories: Social Democratic or Nordic, Liberal, Conservative, or Continental.

The Nordic welfare states are the most advanced or mature of these clusters, and they have received a lot of attention in the welfare literature. Sweden is a better example to use as a case study inside this cluster. There are numerous reasons, including, but not limited to, structural reforms in the final stages of the 18th century, which marked the beginning of a welfare state, being the cradle of Nordic welfare states because it was the first Nordic country

to refer to the Bismarckian policies implemented in Prussia, exclusion from two world wars, natural resource wealth, a homogeneous population forming a foundation for solidarity, and so on. Exploring the Swedish welfare state, highlighting its historical course, obstacles, and successful assemblies, might help to learn lessons for the future of the global economy.

Beginning with the Prussian Chancellor, welfare states grew over the course of a century, peaking after World War II. The "Golden Years" were followed by two oil crises in the 1970s and 1980s, a recession in the 1990s, and a crisis in the early 2000s. As a result, with the exception of the 2008 crisis, welfare states have been blamed for economic downturns and self-destructive features since their peak. In the next chapters, I will analyze the historical milestones of welfare states in greater depth.

As previously mentioned, a welfare state has been attributed to almost every economic downturn and crisis; nevertheless, there was one exception: the 2008 global crisis. It was the first time that a welfare state was considered a remedy rather than a cause of an economic depression. Sweden was already familiar with some of the insights from the early 2000s, making it simpler to adjust to the post-2008 period. Furthermore, Sweden's extensive social policy structure and interventionist past have helped the country adjust to changing situations far faster than other countries. The welfare state effectively allowed major social security systems to serve as built-in buffers. Furthermore, the government launched a nationwide wage replacement scheme to ensure that unemployed individuals had security. A significant feature of institutional adjustment in Scandinavian welfare states, notably in Sweden, is the increased engagement of the private sector in the financing of governmental social programs.

Investigating a welfare state prior to and following the 2008 crisis can shed light on the topic by establishing connections and giving viewpoints for the future. For instance, the COVID-19 crisis, which was a massive historical event with consequences for almost every sector of the world economy, supports the study's relevance and lays the groundwork for future research. Despite the common expectation that a welfare state would fail, it reintroduced them to the conversation.

3. Material and Methods

This study began with the goal of unlocking black boxes, with each one giving new insights about the subject. I laid the groundwork and defined the research problem by reviewing the technical literature and using Sweden as an example. In this chapter, I went deeper into the quantitative analysis.

Because my research focuses on institutional analysis, I first identified a research problem and then used appropriate econometric tools to provide an answer to the problem (a research question) (Bergh and Bjørnskov, 2011). To answer the research question, I combined qualitative and quantitative methods. I collected the data from international databases. I used the data for 15 OECD countries, starting with cluster analysis to check and compare results; later, I built two regression models reporting Pooled OLS and Fixed Effects models to extend the analysis for 16 OECD countries.

Cluster Analysis

The typology used in this study was proposed by Esping-Andersen (1989, 1990); however, because that study was conducted decades ago, I reexamined it and compared it to my own findings.

In the present research, I first used hierarchical cluster analysis to check the cluster numbers, followed by K-mean cluster analysis with the determined number of clusters. The analysis was performed for two years, 2009 and 2018, on the data gathered for 15 developed welfare states. As in K-mean cluster analysis, hierarchical cluster analysis was conducted with the Euclidean distance to measure the similarity or dissimilarity of the observations. In calculating the similarity between two clusters, a range of alternative methods are available, but the centroid method was adopted for this research (James et al., 2013).

Table 1. All Clusters - Composition Change 1990/ 2009/ 2018

	Liberal	Conservative	Nordic	OCC- one country cluster
1990	Australia	Austria	Denmark	
	Canada	Belgium	Finland	
	Ireland	Netherlands	Sweden	
	New Zealand	France	Norway	
	UK	Switzerland		
	US	Germany		
2009	Australia	UK	Denmark	Belgium
	Canada	US	Finland	
	Ireland	Austria	Sweden	
	New Zealand	Netherlands	Norway	
		France		
		Switzerland		
	Germany			
2018	Australia	Ireland	Netherlands	Belgium
	Canada	UK	Switzerland	
	New Zealand	US	Finland	
	Denmark	Austria	Sweden	
		France	Norway	
		Germany		

Sources: Esping-Andersen (1990) and my results.

Regression Analysis

To investigate the research problem, I built regression models on the panel data to note how welfare components impacted state intervention, as well as the pattern of this impact.

My regression analysis consists of two methods: Pooled OLS and Fixed Effects models. My secondary data covers 16 advanced welfare states for a period of 20 years.

The Pooled OLS model equation can be written as follows:

$$G_{it} = \alpha + \beta_1 G_{it-1} + \beta_2 GDP_{it} + \beta_3 Own_{it} + \beta_4 Bargain_{it} + \beta_5 LabReg_{it} + \beta_6 Tax_{it} + \beta_7 Reg_{it} + u_{it}$$

Where G_{it} is the government expenditure for country i at time t , Reg_{it} is the regulation, $LabReg_{it}$ is the labor market regulation, Tax_{it} is tax compliance, $Bargain_{it}$ is the centralized collective bargaining, Own_{it} is state ownership of assets, GDP_{it} is the GDP growth, and G_{it-1} is a lagged G variable. The latter is an additional control since there can be a relationship with the outcome, but this effect may occur gradually. It is assumed that the error term u_{it} is a white noise process that follows a normal distribution with zero mean and constant variance.

The Fixed Effects model equation can be written as follows:

$$G_{it} = \alpha + \beta_1 Reg_{it} + \beta_2 LabReg_{it} + \beta_3 Tax_{it} + \beta_4 Bargain_{it} + \beta_5 Own_{it} + \gamma_i + \delta_t + u_{it}$$

Where γ_i represents the country-fixed effects and δ_t the time-fixed effects.

Table 2. Comparison of Results – OLS vs FE

	Nordics			All Countries		
	Pooled OLS	Stepwise OLS	FE	Pooled OLS	Stepwise OLS	FE
Constant	4.659 (4.732)	1.585 (1.913)	NA	2.024 (1.439)	2.361 (0.966)	NA
G1	0.849*** (0.074)	0.875*** (0.066)	0.775*** (0.077)	0.963*** (0.012)	0.965*** (0.011)	0.843*** (0.034)

GDP	- 0.131*** (0.045)	- 0.141*** (0.042)	- 0.134*** (0.043)	-0.041** (0.016)	-0.041** (0.016)	- 0.048*** (0.018)
Own	0.516** (0.23)	0.475** (0.214)	-0.585 (0.489)	-0.076 (0.068)	-0.096 (0.061)	-0.269** (0.146)
Bargain	0.034 (0.12)	NA	-0.116 (0.191)	-0.043 (0.031)	NA	-0.135** (0.066)
LabReg	0.383 (0.341)	0.192 (0.117)	0.097 (0.351)	0.025 (0.065)	NA	0.023 (0.121)
Tax	-0.382** (0.162)	-0.352** (0.152)	- 0.549*** (0.185)	-0.085 (0.063)	-0.102* (0.061)	- 0.230*** (0.082)
Reg	-0.475 (0.671)	NA	0.167 (0.686)	0.018 (0.48)	NA	-0.008 (0.241)
R2	0.9042	0.9032	0.7544	0.9741	0.9739	0.7451
F-test	3.07 (0.03)	2 (0.09)	NA	2.54 (0)	2.36 (0)	NA
DW	1.68 (0.02)	1.69 (0.04)	1.81 (0.1)	1.6 (0)	1.58 (0)	1.64 (0)
BG	22.97 (0.24)	20.62 (0.35)	33.42 (0.02)	49.05 (0)	49.33 (0)	70.4 (0)
BP	11.62 (0.07)	12.26 (0.06)	14.43 (0.03)	603.82 (0)	596.58 (0)	551.18 (0)
Hetero	0.54 (0.09)	0.53 (0.08)	0.54 (0.09)	0.91 (0.55)	0.9 (0.55)	0.91 (0.55)

G1: lagged value of G; ***: statistically significant at 1%; **: statistically significant at 5%; *: statistically significant at 10%.

Standard errors are in brackets.

4. Summary and Conclusion

To recapitulate, welfare states may represent the outcome of markets failing to work effectively. There are various definitions of welfare states; nevertheless, in my research, I took the perspective that a welfare state is a macroeconomic coordination framework integrating market instruments and government oversight. High taxation, intensive government intervention, a high level of welfare expenditures, universal access to social services, a substantially higher level of ownership by the state, and a high level of de-commodification are some of the main features. State intervention and higher taxation can be viewed as systemic flaws. However, defining a welfare state as a weapon for government intervention is inaccurate. The range and breadth of the functions' linkage, as well as the magnitude of their association, may reflect how strong or weak welfare states are. In this context, a state and a market can play their respective roles without clashing with one another, benefiting the overall system. Because of this feature, welfare states were able to gradually react to internal and external challenges.

I chose to analyze Sweden as a case study to obtain initial insights through qualitative analysis. The Swedish welfare state is unique because early agricultural reforms helped distance the economic system from universalist views, and a governing body began to intervene in markets. Sweden experienced structural improvements in the late eighteenth century that marked the foundation of the Swedish welfare state. Despite their inability to comprehend it at the time, land reforms aided in the implementation of future social programs. Furthermore, Sweden was the cradle of Nordic welfare states because it was the first Nordic country to refer to the Bismarckian policies implemented in Prussia.

And when it comes to the global crisis, Sweden has already learned a few lessons from the early 2000s, making it simpler to adjust to the post-2008 age. This crisis differs significantly from the crises of the 1970s and 1980s, when the welfare state was blamed for the financial issues. According to polls, the vast majority do not blame the welfare state for the crisis; rather, they see it as a solution to the economy's problems. Since the global financial crisis, citizens value the welfare state even more since it does exactly what it was designed to do: protect residents from losing their livelihoods.

Furthermore, Sweden's extensive social policy structure and interventionist past have helped the country adjust to changing situations far faster than other countries. In 2008, the Swedish krona fell against the euro, giving Swedish exporters a competitive edge. Furthermore, Sweden's right-wing government responded immediately to the economic collapse with a major budgetary stimulus plan. With its financial standing in satisfactory condition going into the turmoil, the authorities supplied tax incentives, and numerous sectors obtained assistance to help with rearranging and closing strategies. The welfare state effectively allowed major social security systems to serve as built-in buffers. Furthermore, the government launched a nationwide wage replacement scheme to ensure that individuals who were unemployed had security. A significant feature of institutional adjustment in Scandinavian welfare states, notably in Sweden, is the increased engagement of the private sector in the financing of governmental social programs. While outsourcing of these programs has been limited in certain places, subsidized operations by the corporate sector have increased dramatically in sectors such as education, healthcare, and others. Market-driven government procedures grew as well (Hemerijck, 2013, Farnsworth, and Irving, 2011).

It is worth noting that the 2008 crisis is significantly different from the crises of the 1970s and 1980s, when the welfare state was thought to be the cause of the financial meltdown. According to polls, most people aren't pointing fingers at the welfare state for the crisis; rather, it is seen as a solution to the economy's problems. Since the crisis, people have valued the welfare state even more since it accomplishes what it was designed to do: protect citizens from losing their livelihoods (Vis et al., 2011).

The typology for this research was adopted from the one suggested by Esping-Andersen (1989, 1990); however, as the study was performed decades ago, I re-examined and compared it with my study's results. Moreover, there were numerous prior studies that were inspired by Esping-Andersen's typology; for example, Scruggs and Alan (2006, 2008), who decided to replicate the data despite the differences in outcomes, accepted the main foundations. (Additional investigations include Rice, 2013; Van Kersbergen and Vis, 2015; Ferrera, 1996; Castles and Obinger, 2008). Also, most of these studies mostly focused on Western-developed regimes, due to the lack of data for other regions and countries.

Additionally, country scores based on cluster analysis were estimated using the deviation from the mean, which varies depending on the countries that were taken into account (Kunißen, 2019). The results and techniques are diverse since there are no definite and unambiguous recommendations on this topic.

As mentioned earlier, there is no universally accepted definition or measurement of welfare components in the literature on the subject. Consequently, researchers frequently apply methodologies previously employed to investigate welfare metrics in the literature. Several studies have employed indicators as variables to quantify welfare systems (Eger and Breznau, 2017; Jordan, 2013). Furthermore, the vast majority of studies employing this technique rely on expenditure-based metrics as their primary indicators (Kvist, 2011). According to these investigations, the single-indicator technique is more advantageous than others. However, the single-indicator method of using welfare state indicators has drawbacks, such as the possibility of a restricted informative value and possible calculation problems. These can be mitigated by using generally available, constantly updated measurement data sources. Furthermore, the issue of restricted informative value can be addressed by using more indicators (Kunißen, 2019). For the regression analysis, I chose an expenditure-based indicator as the dependent variable, representing state intervention.

The key findings of the present research are as follows:

Thesis 1: Welfare states do not react to external challenges the same way; out of three clusters from the initial typology, Social Democratic welfare states remained more stable compared to other welfare states in terms of typology and did not get closer to other welfare states by adopting policies typical of other clusters. However, the consistency of Nordic (Social Democratic) welfare states with their "typical components" was not demonstrated.

Thesis 2: Tax compliance costs had a negative impact on state intervention in both Nordic countries and economies across the board. Contrary to popular belief from the World War II period, taxes, tax compliance, or costs associated with them do not have a positive impact on state intervention in modern welfare states.

Thesis 3: Because of the 2008 global financial crisis, welfare states increased state intervention by increasing government spending; however, neither changes in overall regulations nor labor regulations had a significant impact on spending.

Thesis 4: State-owned assets have a negative correlation with government spending; welfare states with more state-owned assets appear to have weaker state intervention.

5. Novel Findings, Limits, and Recommendations

The institutional analysis of welfare states is critical not only for the region or countries under investigation but also for other prospective beneficiaries, e.g., for developing regimes, so the research findings can be applied. By adopting this approach, the research problem is identified first, and then an answer to the problem is studied using relevant econometric instruments. I used cluster analysis followed by regression analysis for this study.

This cluster analysis yielded the novel conclusion that the consistency of Nordic welfare states with their "typical components" was not demonstrated. Most importantly, Nordic welfare states have changed, and the characteristics that distinguished these regimes are no longer specific. Welfare state components of this model are not as stringent in the modern era as they once were. It is critical to find out how welfare states have evolved because the Nordic welfare states have attracted public attention since their golden years. The lessons learned from Nordic countries (or from specific members such as Sweden) can be applied to other developing countries to achieve economic progress, or the "Nordic Miracle." However, these specific components from the golden age are no longer significant, and the distinctions between different welfare typologies are becoming less strict.

As previously stated, there is no commonly recognized definition or measurement of welfare components in the existing literature. As a result, researchers frequently employ approaches that have already been used to explore welfare indicators. The regression analysis's novel findings were that, as a result of the 2008 global financial crisis, welfare state components such as tax compliance, regulation effectiveness, and more state-owned assets, which were critical during the golden age, did not have a positive impact on state intervention; in other words, typical welfare state characteristics did not create conditions for more state intervention as they did in previous periods.

To sum up, interest in Scandinavian countries increased during transition eras due to shifting political and global events. And, as in previous decades, questions such as "How can the Nordic welfare state tax so much?" and "What are the reasons for the Nordic miracle?" were investigated. The goal was to determine what worked and what did not work for this

region and then apply those lessons to policymaking. Furthermore, foreign aid to developing countries has historically justified the continued existence of international aid organizations on the basis of state inability. While their initiatives were previously limited to underdeveloped countries (with the purpose of supporting these countries in the establishment of indigenous historical agencies), such organizations are now expanding their efforts to Western countries with sophisticated cultural agencies (Arrhenius and Otero-Pailos, 2010). In the majority of cases, the primary advice for developing countries has been to spread the concept of a free market and decrease state involvement. In contrast, the interventionist state and the role of culture in politics are especially significant in Scandinavian countries. As a result, these findings are significant not only for Scandinavian countries but also on a much broader scale; despite their flaws and obstacles, welfare states can cope (as they have historically) with external and internal challenges, even if a number of factors contributed to this success, such as Scandinavian countries' historical and cultural backgrounds, their absence from two world wars, and so on. Although not all policies and procedures that worked for these regimes should be replicated in developing countries, the lessons learned from the historical path of developed welfare states may help to deal with and, eventually, prevent issues in emerging countries.

The COVID-19 crisis, which was one of the significant historical events having repercussions for nearly every sector of the world economy, is another element reinforcing the relevance of this study and providing a platform for future research. It reintroduced welfare states into the debate. Despite the common perception that welfare states would collapse, there was a revival of government control. Many governments reduced taxes and used emergency money to assist firms and residents (Sinyavskaya, 2020).

A few years ago, most individuals would not have been in favor of the government granting increased welfare benefits to working-age people in most countries. However, the recent crisis has changed people's views on this matter. While there is still a significant portion of the population in favor of providing benefits for retirees, there is a growing recognition among voters of the challenges faced by those who are of working age and also in need (Curtice, 2020). More generous governments and more efficient welfare policies aided in dealing with it and enabled citizens to continue acting as economic agents without

fear of the future or uncertainty. States that are more generous can reduce economic pressure on citizens, which benefits everyone. Many governments pursued politics, supporting generous policies, from the start of the pandemic, and this is one lesson learned from the crisis. Efficient welfare states not only see market participation as the end of welfare provision; they also organize and deploy the state's commodification power through social services markets, which extend the commodification of claimants in significant ways (McGann, 2020). Typically, the welfare state defines the level of risk people in a particular society experience. Enhanced social policies lower risk assumptions and increase population well-being. The impact of the welfare state is determined by how quickly a government enacts stringent regulations. The welfare state reduces risk concerns as the time it takes a government to respond increases. Whenever governments cannot implement successful mitigation actions during a crisis, the welfare state is of the utmost significance. If the government acts quickly during a crisis, it can help reduce people's worries and fears. When the government doesn't step in, the problems that could happen in the future are worse. Subsequently, the welfare state emerges as the next line of defense for protecting people (Breznau, 2020). Compared to other developed nations, the Nordic countries have introduced the fewest new measures to deal with the COVID-19 crisis and assist their citizens. Because of their many social programs catering to various circumstances, these nations did not require drastic measures to manage the ongoing crisis and ensure the comfort of their population. Their resilience and aptitude to confirm have served as a safeguard against unexpected circumstances (Sinyavskaya, 2020).

When conducting future research, it will be vital to recognize the problems that welfare states have historically confronted and how they have responded to them, as well as how welfare states might react if the future global economy encounters a similar predicament. Institutional research on welfare states is important because it can help to learn lessons from the past and use them for the future to establish more effective measures to avoid risks. Future insights from my study could generate key research queries, concepts, and issues for future studies on topics such as "the 2008 Global Crisis," "Developing Welfare States," and "Welfare State Retrenchment," amongst others. To carry out this research, it is critical to understand the problems that welfare states faced and how they dealt with them, as well as how welfare states might respond if the global economy faced a similar situation.

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