

# Social Welfare for a Global Era

International Perspectives  
on Policy and Practice



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# The Field of International Social Welfare

**T**his book defines *international social welfare* broadly to include a great variety of practical activities that promote social wellbeing around the world. The term is also used to refer to the academic study of these activities. As mentioned in the book's introduction, practical activities, which are known as interventions, include policies, programs, services, and projects. These interventions are implemented by different agents in the context of culturally embedded institutions. The field's second aspect, namely the academic study of international social welfare, is concerned with documenting, classifying, analyzing, and evaluating these activities. Scholars have also developed theories that explain how welfare institutions evolve and function in different societies, and in addition to studying welfare institutions, they have undertaken research into policies and programs that operate at the international level. Academic inquiry into international social welfare has expanded rapidly in recent years. Today, scholars in sociology, political science, and economics, and in interdisciplinary fields, such as social policy, development studies, and social work all contribute to understanding the complex ways that social welfare is promoted in the global era.

The chapter begins with an account of the practical aspects of international social welfare by describing the different types of interventions that are used to enhance social wellbeing. These include social policies, social plans, social services, programs, and projects. It then discusses the major welfare institutions that provide a cultural context for the implementation of interventions. These institutions also shape the way different agents implement interventions. Next, the academic study of international social welfare is examined by tracing the historical evolution of the field and discussing the multiple contributions of scholars working in different disciplines and interdisciplinary subjects over the years. Different academic approaches are reviewed and some of the methodological issues arising from international social welfare scholarship are

discussed. Finally, the benefits as well as the challenges of engaging in international social welfare are considered, revealing that today there is a greater awareness of the challenges facing international social welfare practice and scholarship and that many of these challenges are being addressed. This augurs well for the future and suggests that the field is rich with opportunities to contribute to social wellbeing around the world.

## **Practical Aspects of International Social Welfare**

The practical dimensions of international social welfare are concerned with interventions that are purposefully designed to promote people's wellbeing. Although some commonplace activities like showing kindness to others are not usually regarded as interventions, they contribute to social wellbeing and should be kept in mind, especially when considering the role of nonformal welfare institutions. Also, those activities that diminish social wellbeing by fostering illfare should also be kept in mind. Nevertheless, this book focuses on those interventions, including policies, plans, services, programs, and projects that are purposefully intended to enhance social wellbeing.

Policies are prescriptive statements that define goals and govern the implementation of services and programs. Policies are formulated by many different organizations, including nonprofits and commercial firms, but many social welfare scholars focus on the policies and programs of governments, which may be contrasted with other types of government policy, for example dealing with national defense, the environment, or international relations. Government social policies are based on legislation and implemented by public agencies responsible for the major social services. As discussed in Chapter 8, governments also use incentives, regulations, the tax system, and mandates to implement their policies. Although formulated primarily by politicians and their professional staff, interest groups, lobbyists, the media and public opinion can also affect the formulation of social policies. The implementation of government social policies is usually the responsibility of the civil service, which is also responsible for evaluating outcomes; however, it is now quite common to contract out or outsource services to nonprofits and commercial providers.

Plans direct and facilitate the implementation of policies by setting quantifiable goals that are implemented according to a predetermined time scale. Plans concerned with social policies are known as social plans and are focused on improving health, education, employment, standards of living, and enhancing social service coordination and delivery. In Western countries, social planning is usually undertaken through the regular budgetary process, whereas in many developing countries, separate governmental planning agencies are created at the national level to formulate long-term plans that define social and economic development goals. Planning is also undertaken, although on a lesser scale, by nonprofit and faith-based organizations and commercial firms.

Services are well-established provisions designed to benefit particular groups of people (known as clients or sometimes as consumers) on a regular basis, and are the

primary means governments use to implement social policies. Generally, social policy writers focus on the “big five” social services that include social protection (including social insurance and social assistance), health and medical services, educational programs, housing, and the social work services. This latter group is also known as the personal social services, human services, or family welfare services. They include mental health, child welfare, and family services as well as services provided to elders and people with disabilities. Although some writers believe that transportation services, nutritional programs, and the correctional system should be regarded as social services, they are seldom included in the social policy literature. Although the social services have historically been administered by government agencies, it was mentioned earlier that they are often contracted out or outsourced to nonprofits and commercial providers.

Services are very similar to programs and the two terms are often used interchangeably, although programs are usually of shorter duration than services. Projects are small-scale and time-limited interventions usually implemented at the local level by nonprofit and community associations, but of course, government can also implement these types of projects. Projects are widely used in developing countries to serve low-income communities and they are often funded by international donors through aid programs. Generally, projects are concerned with achieving short-term goals, such as constructing maternal and child health clinics, or establishing youth centers or cooperatives. Unlike projects, programs may comprise a number of projects, but they are not usually located in particular communities. Like services, programs are often funded by governments, but contracted out to nonprofits and commercial providers.

People, groups, and organizations that implement interventions are known as agents. Welfare administrators, managers, policymakers, planners, and professionals, such as social workers, teachers, and nurses are readily identified as welfare agents, but the contribution of paraprofessionals and volunteers should also be recognized. Families, grassroots community associations, and clubs are also welfare agents as are formal organizations, such as nonprofit and faith-based organizations, commercial firms, and government agencies, including social service departments or ministries. Welfare agents also include foundations and international organizations, for example the United Nations, International Labour Organisation (ILO), and the World Bank. As will be apparent, many different individuals, groups, and organizations function as welfare agents to promote social welfare in the global era.

### **The Role of Welfare Institutions**

Welfare agents do not operate in isolation, but channel their activities through culturally embedded institutions. These include nonformal institutions, such as the family and community as well as formal institutions, including philanthropy, the market, and state. These institutions have evolved over the centuries and shape the activities of agents who promote social wellbeing at the individual, family, community, and societal levels—as well as the international level. Although the major welfare institutions are briefly described in this chapter, they are examined in more detail in Part II of this book. The role of different agents operating within the context of these institutions is also considered.

Some welfare institutions are more prominent in some societies than others. Nonformal institutions are especially important in traditional communities in the Global South while statutory institutions play a more prominent role in the Western nations. Nevertheless, both formal and nonformal institutions operate throughout the world today. As in the Western countries, the governments of developing countries have assumed greater responsibility for social welfare, especially after the Millennium Development Goals were adopted in 2000 by the member states of the United Nations. Government involvement is set to continue with the recent adoption of the UN Sustainable Development Goals. Also, the number of nonprofit organizations has increased rapidly in the developing world where they previously played a minor role. Another development is the greater prominence given to the market in social welfare and the emergence of new institutional approaches like social development.

The oldest and most pervasive nonformal welfare institutions are composed of family and community welfare practices. The family is arguably the most important nonformal welfare institution since it is the locus of care, nurturing of children, and support of needy family members. Throughout history, women assumed primary responsibility for caring, but this situation is changing, particularly in Western countries, where men are much more involved than before. Traditionally, the family has also been the site of economic activities. For centuries, family members worked together in agriculture, herding, trade, and similar activities to meet their material needs. With industrialization and the expansion of wage employment, the family has been distanced from these livelihood activities, but even today family members share resources and many assist in running family businesses. Families also seek to solve social problems, often with the help of kin, friends, neighbors, and other community members.

Welfare practices also operate at the community level through social supports and reciprocal obligations. Throughout the world, many local people use community support networks and participate in projects that promote community wellbeing; many also belong to member-owned mutual aid associations and cooperatives. These activities are particularly strong in the Global South where village people collaborate to build wells, bridges, and roads, and where farmers help each other with planting and harvesting crops. However, similar cooperative activities are also found in Western rural communities. Community support networks also function in the cities of Western countries where neighbors often provide care for elders, small children, and needy families.

Nonformal welfare practices give expression to institutionalized cooperative values and expectations rooted in reciprocal exchanges. Cultural expectations of this kind are particularly strong in traditional communities in the Global South and among migrants in Western countries where familial, kin, and clan networks link people together. Unlike many Western countries where family obligations have been eroded by a decline in the extended family and by the rise of individualism, families in traditional communities are major providers of social welfare. Nonformal welfare is also enshrined in religious mandates to give alms, care for the needy, and support those who provide religious charity. These ideals continue to motivate many people who give generously to charities and support the work of faith-based organizations around the world.

Nonformal welfare practices may be contrasted with *formal social welfare institutions* that include faith-based and secular philanthropy, the state, the professions, the market, and new institutional practices like social development. They are known as formal institutions because they use organizations, policies and procedures, and often employ staff to achieve welfare goals. *Faith-based philanthropy* is arguably the oldest formal institution since hospitals, asylums, and orphanages under religious sponsorship catered to those in need for many centuries. However, many faith-based organizations no longer restrict their work to charitable activities, but provide educational and medical services and engage in social development projects. Many have also adopted managerial procedures to enhance their efficiency. In addition, their services are usually not limited to their own congregants, but cater to other groups as well.

Religious philanthropy is augmented by *secular philanthropy*, which grew rapidly in Western countries in the nineteenth century. Although many nonprofits were founded by pious social reformers, they were not linked to any particular denomination and instead based their activities on what was regarded as a scientific approach that would be efficient and effective. Since then, the *nonprofit, voluntary, or third sector* has grown exponentially and now functions as a distinctive welfare institution around the world. Although nonprofit organizations were previously not very prominent in the Global South, they are now extensively involved in social welfare, often with the assistance of international donors and foundations.

During this century, the government or *the state* assumed a major responsibility for social welfare. Although previously limited in scope, government welfare programs expanded rapidly in the years following the Second World War and now consume sizable revenues in the Western nations. They also grew rapidly in the Global South. Governments are the primary provider of education, health care, and social services today and they also address a range of social problems, including poverty, crime, homelessness, and ill-health. In addition to providing social services, governments promote welfare through mandates, regulations, subsidies, and incentives and often the tax system is used for this purpose. Through legislative and executive power, they have the authority and resources to promote social wellbeing on a major scale and it is for this reason that many welfare scholars focus on their activities.

The *professions* comprise another institutional approach to promoting social wellbeing. Professionals, such as social workers, nurses, teachers, lawyers, and physicians staff the social services both in the governmental and nonprofit sectors and many also work as independent providers. Although different professionals are involved, this book focuses on the role of *professional social work* to illustrate the way professions contribute to social welfare. Best known for their casework and counseling, social workers bring their skills, values, and knowledge to bear on welfare issues, and in addition they are involved in community organization, residential care, and social service administration. Social workers are also employed by government social service agencies and especially in fields such as child welfare, mental health, and family services; they also work in nonprofit organizations and some are finding employment with commercial providers.

Although the *market* is an economic institution, it also contributes to social welfare. To meet their needs, families have traded and purchased commodities on markets for centuries and used financial firms to obtain insurance and save for retirement. However, markets have not been as important as the family, philanthropy, or the state, and it is only recently that commercial enterprises have become extensively involved in social welfare, particularly in Western countries. Unlike voluntary organizations, commercial firms are motivated by profits rather than altruism and many have secured lucrative social service contracts from governments. Accordingly, their involvement is controversial. Although many believe that social welfare should not be driven by commercial considerations, others contend that efficiency is increased when competition and the profit motive governs welfare policies and practices.

Another institutionalized approach for promoting social wellbeing, particularly in the Global South is *social development*. Social development differs from other welfare institutions in that it links social programs directly with economic development. Social development advocates argue that social wellbeing can best be enhanced by harnessing economic growth to create employment, generate incomes, and raise standards of living. Social development projects and programs are implemented largely by grassroots community organizations and nonprofits with the support of governments and international organizations and they make extensive use of social investments to enhance the wellbeing of families, communities, and societies. Although social development emerged in the Global South, it is being adopted in Western countries, even though it has not attracted much attention from social welfare scholars in these countries.

### Academic Aspects of International Social Welfare

In addition to comprising a practical field, the term international social welfare refers to academic inquiry into social welfare undertaken by scholars working in different disciplines and interdisciplinary fields, and also by practitioners who have documented welfare projects and programs in many countries. Political scientists and sociologists are arguably the most prominent disciplinary scholars in the field, but economists and anthropologists have also contributed. In addition, scholars in interdisciplinary fields, such as social policy and development studies have undertaken extensive research into international social welfare. Social policy scholars are primarily concerned with statutory programs and their work is often known as comparative welfare state studies. The international organizations also contribute by hosting conferences and producing reports, statistical compendia, and studies of international social welfare. Today, an extensive amount of information about international social welfare is available, providing a solid foundation for practitioners committed to improving social welfare around the world.

Although writers, such as Bentham and Kant laid the foundations for the study of international social welfare, its origins are usually traced to the reports and other documents produced by the leaders of nonprofit organizations and social reformers in the nineteenth century who also collaborated internationally to share information, document new approaches, and replicate innovations. This was the case in the United

States where several European innovations were adopted. For example, Hokenstad and Midgley (2004b) point out that the first settlement houses in the United States were established after American reformers visited Britain and learned about their activities. Similarly, Rodgers (1998) reveals that many American social reformers went on “sociological tours” to Europe in the early decades of the twentieth century to study welfare innovations in the region. These developments contributed to the first academic studies of international social welfare, for example the work of Armstrong (1932), a Berkeley law professor who was one of the first to document social insurance and related social protection programs in Europe and other Western countries. Her work is important because it was used to inform the American government’s own social insurance retirement system, which was introduced in 1935. A very different example is a study of the social service programs established in the British colonies before the Second World War by Mair (1944), a British anthropologist who wrote one of the first academic accounts of social welfare in the Global South.

However, these are early and isolated examples of international social welfare research and it was only in the 1960s that comparative studies began to appear regularly. Scholars at the London School of Economics, under the leadership of Richard Titmuss, led the way by comparing developments in countries, such as France, Sweden, and the United States with Britain’s social policies. In addition, Titmuss and his colleague Abel-Smith (1961) undertook advisory missions to developing countries like Mauritius and Tanzania to assist their governments to formulate social policies. Their work was accompanied by the work of Jenkins (1969) and Rodgers, Greve, and Morgan (1968), who documented and compared the statutory social welfare programs of several Western countries. Other scholars produced case studies of a single country, and particularly countries about which little was known. One example is Madison’s (1968) pioneering account of social welfare in the Soviet Union, which exposed Western readers to a welfare system that had been ignored by Western scholars. Some writers like Friedlander (1955, 1975) documented the activities of international organizations, such as the Red Cross and the United Nations High Commission for Refugees (UNHCR), anticipating the subsequent emergence of the field of global social policy. In fact, Friedlander (1975) defined international social welfare as the study of these organizations and their services.

Some social welfare scholars were less interested in documenting social welfare interventions and sought to test theoretical propositions. For example, Rimlinger’s (1971) pioneering analysis of the evolution of government welfare in Europe, America, and Russia built on Wilensky and Lebeaux’s (1965) earlier research which claimed that statutory welfare programs invariably expand in societies that are undergoing industrialization. Numerous other studies designed to test their welfare industrialization hypothesis were also undertaken at this time. Subsequently, theoretical inquiry increased rapidly and involved scholars in a variety of social science disciplines. In addition, some scholars like Titmuss (1971) focused on normative questions. His study of blood donation in different countries provided support for his view that social welfare should be motivated by altruism rather than markets. Since then, different normative positions in social welfare have been identified and debated.



Historically, international social welfare scholarship focused on Europe and North America and it was only in the 1980s that academics began systematically to document social welfare in the Global South. Some early studies, such as Dixon's (1981) account of social welfare in China, and Onokerhoraye's (1984) survey of the Nigerian welfare system were descriptive country case studies, but a number of books that focused on policy and theoretical issues also emerged. One of the first was by MacPherson (1982) who drew on international structural or "dependency" theory to offer a critical interpretation of social policy in the Third World, as it was then known. Another example is Midgley's (1984) account of social security and inequality in the Global South. Subsequently, MacPherson and Midgley (1987) collaborated on a metatheoretical examination of various issues relating to the study of social policy in the developing world.

Academic inquiry into international social welfare has increased significantly since the 1980s. Although the field has historically been dominated by Western academics, scholars from all over the world now contribute. Universities outside Europe and North America have established courses in social policy and social work and engaged in international social welfare research. Some have formulated unique academic approaches. One example is the emergence of "welfare science" in Japan, which Furukawa (2008) reveals is based mostly on sociological research. Similar developments are taking place in China where social welfare is growing rapidly as an academic subject. However, despite many achievements, scholarly inquiry into international social welfare still faces a number of methodological and other challenges. Some of these challenges are discussed later in this chapter, but first reference should be made to the different approaches and methodologies used by international social welfare scholars. As mentioned in this book, Deacon (2007) and his colleagues associated with the journal *Global Social Policy* made a major contribution to the methodology of international social welfare. Focusing on the work of the international organizations, they promoted a more incisive understanding of the way social wellbeing is enhanced at the global level.

### **Approaches and Methodologies**

Today, scholars from different disciplines and interdisciplinary and professional fields bring very different perspectives to the study of international social welfare. Using a macroperspective that focuses on the nation state, social policy scholars are primarily concerned with government programs, while anthropologists focus on families, local support networks, and traditional welfare practices. Political scientists and sociologists are primarily interested in theoretical questions relating to government provisions, while social workers are largely concerned with practical matters. However, because very different perspectives are used to study international social welfare, scholarship in the field remains fragmented and no coherent approach that integrates these diverse insights has emerged. Nevertheless, theoretical and practical knowledge about international social welfare has benefited from the different approaches of academics in these different fields.

The academic study of international social welfare has several distinctive features. First, it is *descriptive* because it seeks to document and compare social conditions

and social welfare programs in different societies. Using the *case study* approach, this research focuses on statutory provisions in social security, health care, housing, education, and the social work or personal social services. A great deal of international research using the case study approach has now been published. This ranges from comparative studies of one social service like social security to the whole social service systems of different countries. Although single country case studies are not technically international in scope, they also contribute to international social welfare knowledge. Studies of the welfare systems of different countries have been accompanied by studies of social spending, which have been used by social policy scholars to determine what is known as the *welfare effort* of different countries. One early example is Aaron's (1967) analysis of the statistical correlates of government social spending in twenty-two Western countries. He found that a large number of economic and political factors contribute to government spending and that it is difficult to identify a single determinant of the expansion of statutory programs. On the other hand, Wilensky (1975, 2002) used extensive statistical data to confirm his earlier conclusion that welfare effort is primarily attributable to industrialization.

Although many international social welfare scholars favor the use of case studies, others use whatever comparative information they can find to either validate or refute generalizations. This approach is known as the method of *selective comparisons* and may be contrasted with the more rigorous *systematic comparisons* approach that is based on case studies. Although Titmuss (1971, 1974) persuasively used selective comparisons to support his views about the desirability of state welfare, his technique was heavily criticized for being biased and unscientific. Jones (1985) pointed out that moral crusading is not the same as a rigorous analysis based on a careful assessment of comparative data, and Pinker (1979) claimed that Titmuss unfairly presented his arguments in ways that favored his own normative preferences. Nevertheless, selective comparisons are frequently used in international social welfare research today, and despite criticism, they have permitted broad and interesting analyses of social welfare institutions in the global era.

Descriptive studies of social welfare interventions have been accompanied by studies of *social conditions* around the world. Because governments and international organizations routinely collect data on health, life expectancy, education, income, housing, and other social conditions, scholars have access to a vast store of statistical information. These data are produced by many international organizations as well as governments and nonprofits, and are also used to develop aggregate *indicators* that permit researchers to create profiles of social conditions in different countries. In addition, social surveys and other techniques are employed to study social conditions. Often, research into social conditions has facilitated the formulation of social policies that enhance social wellbeing.

The case study approach is augmented by *typologies* that seek to classify government welfare provisions around the world. They offer conceptual models and classifications of government welfare provisions. As we discuss again in Chapter 8, many typologies have been constructed and they are very popular. One of the first was Wilensky and Lebeaux's (1965) "institutional" versus "residual" typology, which was originally used

to characterize different approaches to social welfare in the United States, but it was subsequently employed to classify the welfare systems of different countries. Using this approach, the European countries are said to be committed to an institutional model whereas the United States favors a residual approach. Titmuss (1974) augmented this typology by adding the “work performance model,” which he believed characterizes some European and communist countries, and where he argued participation in the labor force is generally a prerequisite for receiving social welfare benefits. Subsequently, Esping-Andersen’s (1990) typology of welfare regimes was widely adopted to classify Western countries, but his approach has also been used by Gough and his colleagues (2004) to create a typology of the welfare systems of developing countries.

Secondly, international social welfare scholarship seeks to *analyze* and *explain* the causal factors that shape welfare provision around the world. This research has focused on the factors that prompted the expansion of government welfare in the twentieth century. As noted earlier, Wilensky and Lebeaux (1965) argue that this came about because of industrialization and some studies have confirmed this finding. Since then, the role of interest groups and political parties in advocating for state welfare expansion in these countries has been examined and today numerous theoretical explanations of the determinants of government welfare have been formulated. In addition, theoretical work has drawn attention to the role of gender, racial and ethnic diversity, the environment, and globalization in social welfare. The insights of Marxism, corporatism, feminism, interest group theory, and other theoretical perspectives have also been used to analyze social welfare around the world.

Thirdly, international social welfare scholarship is concerned with *evaluating* the impact of welfare interventions. Evaluations are much more widely used today than in the past when social programs were funded without requiring assessments of their effectiveness. In addition, evaluation research was often poorly designed and badly implemented. Today, demonstration projects are widely used and many sponsors now require that outcome studies are undertaken as a condition for funding. This is particularly true of social development projects financed by international donors. Furthermore, evaluation studies are now more carefully designed and randomized trials are more frequently used. One example of this approach is Banerjee and Duflo’s (2011) evaluations of poverty alleviation programs in developing countries. In addition, there is a far greater emphasis on evidence-based policymaking and program implementation. Nevertheless, greater effort is needed to ensure that welfare interventions do, in fact, achieve their goals.

Evaluating the effectiveness of welfare programs requires that the values and ideological beliefs that shape social welfare interventions are understood. For this reason, international social welfare scholarship is also *normative* in that it seeks to identify and assess the ideological preferences that motivate different social welfare policies and practices. As noted earlier, Titmuss pioneered normative analysis in social policy contending that social policy decisions are invariably political and reflect deeper social values. Since then, many other scholars have excavated the ideological basis of social welfare; George and Wilding’s (1976, 1994) formative analysis has been particularly influential.

Finally, building on its normative commitments, international social welfare is an *applied* field because it is concerned with formulating social policies and implementing interventions that promote social wellbeing. Drawing on evaluative research as well as normative analyses, the writings of social welfare scholars have influenced policymakers and administrators in governments and nonprofit organizations as well as the international organizations. In addition, social science inquiry has been used to develop curricula to prepare practitioners in a variety of fields, but particularly in social work and social administration. Although practitioners do not always recognize the relevance of academic research, practice is shaped by the theoretical ideas and findings of international social welfare scholars.

### International Social Welfare: Benefits and Challenges

Apart from being personally rewarding, engaging in international social welfare has many benefits. It facilitates the sharing of knowledge and experiences and promotes the acquisition of appropriate skills. Fortunately, information about social conditions around the world, the cultural diversity of the world's peoples, and the ways that welfare institutions function in different societies is now readily available. As shown earlier, international social welfare scholarship has generated a good deal of knowledge about welfare interventions and institutions in many different countries. In addition, practice innovations have been documented and many more evaluations of the outcomes of social programs have been undertaken. This has enhanced the effectiveness of international social welfare practice.

An important benefit of international social welfare research is that people's awareness of neglected or poorly understood social conditions is heightened, thus facilitating effective responses. For example, the World Health Organization's (WHO) role in increasing awareness of HIV/AIDS and dispelling popular myths about the pandemic was critically important in identifying its cause and developing an effective treatment. The organization also informed the work of activists who challenged popular prejudices and mobilized support for effectual remedies. Another example of how international social welfare draws attention to neglected problems comes from the field of family studies. The worldwide dissemination of research undertaken in the United States about family violence and the incidence of child abuse helped create awareness of these problems in societies where they would not have been openly discussed. More recently, as information about the genital mutilation of girls in some cultures has become available, efforts to eradicate this harmful practice have intensified.

Another benefit is that international social welfare promotes policy learning. There are many examples of how knowledge of social welfare programs and policies in some countries has fostered the introduction of similar programs elsewhere. It was noted earlier that Armstrong's (1932) comparative study of social insurance informed social security policy in the United States. However, as will be discussed later, it is important that policy learning does not result in the crass replication of programs, but that they are culturally appropriate and carefully adapted to fit local conditions. Although it was widely assumed in the years following the Second World War that the developing countries

would benefit from copying the social welfare policies and programs of Western countries, the need for appropriate policy learning as well as reciprocal exchanges is now recognized. Indeed, some Western countries are emulating innovations from the Global South. A good example is the conditional cash transfer demonstration program established in New York in 2007 after the city's mayor Michael Bloomberg visited Mexico and learned about the country's *Oportunidades* program (now known as *Prospera*). Another example is the dissemination of information about the work of microenterprise programs in developing countries which has fostered the creation of small businesses among poor people in other parts of the world.

International information exchanges are also beneficial because they foster the evaluation of social programs. Projects and programs benefit from studies of their impact in other countries and provide useful information about which interventions are efficient and effective. Knowledge about the impact of social welfare in other countries is also relevant when persuading policymakers about the need for new programs. If programs have been demonstrated to be effective in other countries, politicians and civil servants may be more inclined to consider emulating them when seeking to address local problems. International comparisons may also have wider political implications. For example, American politicians on the political right often claim that the country's allegedly high social spending is having a negative impact on economic development. However, comparative analysis shows that social spending in the United States is not exceptionally high by international standards and that many Western countries with a solid record of economic growth spend considerable sums on social programs.

Engagement in international social welfare also promotes professional development. The expertise of practitioners increases by sharing information, attending international conferences, and undertaking study visits abroad. Although these exchanges are sometimes dismissed as amounting to little more than "welfare tourism," international contacts between government policymakers, administrators, social workers, and the staff of nonprofit organizations help improve welfare interventions. Professional associations also benefit by sharing knowledge with their counterparts in other countries, and today exchanges of this kind are commonplace. Many governments, international organizations, and foundations also use the professional expertise of these associations as well as the contribution of knowledgeable consultants to advise on policy, and increasingly, teams of international experts are assembled by international organizations and foundations for this purpose. Professional associations also advocate for the adoption of policies that enhance people's social wellbeing around the world.

### **Challenges to International Social Welfare**

As in other fields, those who engage in international social welfare face challenges ranging from mundane practical difficulties, such as obtaining visas to work in other countries to more profound concerns, such as understanding cultural differences and forging collaborative relationships with colleagues abroad. The nuances of understanding other cultures and being culturally competent present a particular challenge. Visitors to other countries often do not realize that their words, behaviors, and even

gestures can be misunderstood and may even be offensive. Fortunately, there is a greater awareness of these challenges today, and many sponsoring organizations offer orientation courses before sending their staff, interns, and volunteers abroad. In addition, many nonprofit organizations that facilitate international exchanges and volunteer opportunities have introduced language courses and usually provide information on the politics and cultures of different societies so that visitors have at least a basic preparation in cultural competence.

In addition to the difficulties facing those who work and travel abroad, issues that challenge the field as a whole should be appreciated. These involve understanding how innovations can be usefully transferred from one country to another and how colleagues in different societies can collaborate. While increased collaboration and policy learning brings positive benefits, it was noted earlier that this process has often been accompanied by unilateral transfers involving the uncritical replication of programs. As Midgley (2011a) argues, the tendency to emulate Western social policies is attributable to the legacy of European colonialism, but as MacPherson and Midgley (1987) summarized many years ago, this approach is wasteful and ineffective. Fortunately, there is a greater awareness today of the need for policies and programs that are appropriate to local economic, social, and cultural conditions. Nevertheless, influenced by political pressures and the allure of international aid, many governments continue to rely on Western expertise and inappropriate unilateral transfers still take place. On the other hand, it was noted earlier that some Western countries are now adopting innovations from the Global South. This augurs well for promoting reciprocal and mutually beneficial exchanges.

Academic inquiry into international social welfare also faces challenges. The very different methodological approaches and disciplinary perspectives used in the field provide only partial glimpses into the complexities of international social welfare. For example, by focusing narrowly on the social policies and programs of governments, social policy scholars imply that welfare is the exclusive prerogative of the state and fail to recognize the contribution of families and communities or the role of faith-based and nonprofit organizations. To properly understand how welfare institutions operate, a broader approach is needed. Another problem is the tendency to ignore the work of scholars in other disciplinary fields. For example, few welfare scholars appreciate the significant contribution made by anthropologists who have undertaken extensive research into nonformal welfare institutions in the developing world. One attempt to address this problem is Furuto's (2013) collection of case studies of social welfare in East Asia countries, which draws on the insights of different disciplines and covers the contribution of multiple welfare institutions. More studies of this kind are needed as are attempts to formulate a conceptual approach that integrates the disparate perspectives of different social scientists studying international social welfare.

Ignorance of the contribution of colleagues in other fields results in duplication and inefficiency. One example is the growing interest in social investment among European social policy scholars (Hemerijck, 2013; Morel, Pallier, & Palme, 2012; van Kersbergen & Hemerijck, 2012) who appear to be unaware of the way the concept has evolved in development studies and social development. Their own scholarship

could be enriched by understanding social development's contributions to the field. At the same time, scholars in development studies remain largely unaware of the work of Western social policy writers. The recent increase in research into cash transfers (known generically as "social protection" in development studies), is a welcome development, but as Midgley (2013a) observes it is unfortunate that those who write on the subject remain largely oblivious of the work undertaken in social security by Western scholars.

A related problem is that many social policy scholars are ignorant of the contribution of academics who pioneered the study of social welfare in the Global South and this has perpetuated the erroneous belief that the developing countries have limited and poorly developed welfare provisions. This attitude reflects wider prejudices about the developing countries that can be readily dispelled by perusing the literature. One example of the ignorance of prior work in the field is the claim by Haggard and Kaufman (2008, p. 1) that the study of social welfare in the Global South is of "recent vintage." As was shown earlier, academic inquiry in the field goes back many decades; indeed, Surrender's (2013) comprehensive overview reveals that it has a long and rich history.

Another challenge is the lack of standardization of terminologies. Many concepts are poorly defined, fostering ambiguities and hampering effective policy formulation. One example concerns the use of the term "welfare state," which is widely used, but poorly defined. As Clark (2004a) points out, confusion about the meaning of the term has hindered rather than helped comparative research. Another example is the use of the terms "social security" and "social protection." In the United States, social security refers to the federal government's old age retirement, survivors', and disability social insurance program, while in Britain it includes social assistance, unemployment benefits, and other income maintenance programs. In Latin America, the term includes health care and other provisions. The recent popularization of the term "social protection" in development studies further confuses matters. Obviously, the lack of a standard definition presents a challenge to researchers who want to compare social security programs around the world. As Midgley (2013a) observes, it also presents a challenge to policymakers who need to use standardized terminologies when formulating policies and enacting legislation.

These challenges are compounded by concerns about the accuracy of statistical data about social conditions and social programs. Although data are widely used in international social welfare today, they are often unreliable. Statistics collected routinely by government agencies leave much to be desired, and in many cases, estimates and even guesstimates are used. However, their limitations are seldom mentioned. This problem is particularly pertinent to the statistics that measure progress in meeting the United Nation's Millennium Development Goals. Despite the confidence with which these data are cited, Pogge (2010) points out that accurate information about the living standards of small farmers, informal sector workers, and other low-income people is seldom available. Unless this problem is resolved, it is difficult to reach accurate conclusions about the effectiveness of poverty alleviation programs.

Another problem is that culturally specific perspectives are often used to study social welfare in other countries. Although Esping-Andersen's (1990) three world's typology was intended to classify government programs in Western countries, it has been used in other regions of the world, which artificially distorts reality and limits understanding of the way welfare institutions function in different societies. The widespread use of the term "welfare state" is another example of the imposition of inappropriate theoretical constructs on other cultures. It can foster a Eurocentric, and even as Walker and Wong (2013) suggest an ethnocentric analysis of international social welfare. Instead of imposing Western concepts and typologies *etically* to analyze welfare in other world regions, an *emic* analysis based on a culturally grounded, "bottom-up" perspective would yield more meaningful results.

Despite these challenges, much progress has been made. A good deal of information about social conditions and social programs around the world is now available. Research into the work of nonprofit and faith-based organizations has also expanded and much more is known about family and community support networks. Scholars like Furuto (2013) combine studies of these different welfare institutions to present a more comprehensive picture, and as Deacon and Stubbs (2013) observe, there is a greater awareness among Western social policy scholars of the need to integrate disparate methodological perspectives to formulate a unified conceptual approach that can grasp the complexities of international social welfare. Fortunately, practitioners and scholars are more mindful of the need for cultural appropriateness, and it is encouraging that mutually beneficial reciprocal exchanges are now taking place. There is also a greater awareness among academics of the need to learn from each other. These developments suggest that the challenge of formulating a one world perspective in international social welfare can be met.

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### Suggested Additional Reading

Although more work needs to be done to define basic terminologies and provide a sound conceptual basis for the field of international social welfare, some of the issues arising from the study of social welfare around the world are addressed by the following authors. In order to provide a better understanding of the many complex factors that promote peoples' wellbeing around the world, they provide an overview of the field, discuss methodological problems, and contribute to the integration of different academic and theoretical approaches.

- Deacon, B., & Stubbs, P. (2013). Global social policy studies: Conceptual and analytical reflections. *Global Social Policy*, 13(1), 5–23. This article by two leading scholars of "global social policy" focuses on methodological issues with reference to different theoretical perspectives.
- Fitzpatrick, T., Kwong, H. J., Manning, N., Midgley, J., & Pascall, G. (Eds.). (2005). *International encyclopedia of social policy*. London & New York: Routledge.



Although primarily concerned with government social policy, this important reference source covers diverse aspects of social welfare around the world. It also addresses methodological and other issues related to the study of international social policy.

- Jones, C. (1985). *Patterns of social policy*. London, UK: Tavistock. Although this book was published many years ago, its extensive discussion of the methodology of international social welfare and the challenges facing the field is still relevant today.
- Kennett, P. (Ed.). (2013). *Handbook of comparative social policy* (2nd ed.). Northampton, MA: Edward Elgar. Originally published in 2004, this edited collection contains many useful contributions from leading scholars working in the field of international social welfare. It ranges over a number of important topics and covers events in many different countries.
- MacPherson, S., & Midgley, J. (1987). *Comparative social policy and the Third World*. Brighton, England: Wheatsheaf. This was the first book to examine the study of social policy in developing countries systematically with reference to practical as well as theoretical issues. The book makes a plea for the formulation of culturally rooted approaches that foster a better understanding of social welfare in the Global South.

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