Culture and Welfare State

Values and Social Policy in Comparative Perspective

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The cultural analysis of the welfare state up to now has concentrated mainly on political values. It is highly elaborated in the theory of welfare regimes developed by Gøsta Esping-Andersen (1990). There, the value dimension of social policy is conceptualized on the classical left–right axis of social democracy (or socialism), liberalism, and conservatism, perpetuating the French Revolution's well-known value-triad of equality, freedom, and fraternity/solidarity. These 'basic principles' of welfare-state policies come combined with structural and institutional dimensions, for example, the role of the welfare state versus the market, or gender roles and the family.

However, a twofold, religiously-based reasoning about the process of modernization has accompanied the seeming limitation to the study of political values since the founding years of social policy. Therefore the questions followed in this chapter are: do Christian foundations of the welfare state exist; are, in a globally comparative perspective, other religious traditions relevant for social policies; and, how important is their influence, besides being political value-orientations? The two controversial perspectives on the influence of religion on the modern welfare state are the starting point for my analysis. First, on a more concrete, structural level, advocates of a 'natural' order have argued that the welfare state has contributed to the dissolution of the family by promoting individual rights and labor market integration of women: 'The family is the original and natural institution which provides basic provision' (Koslowski, 1997: 365). Religion, in this perspective, has been viewed as the true haven of a *Gemeinschaft* society, with the family as central part of religious lifestyle, despite contrary theoretical and empirical evidence (Opielka, 1997; Dobbellaere et al., 2003). Second, on a more ideational level, an important strand of secularization theory has made the point that the modern welfare state should be interpreted as the true heir of religious values. That

could have happened either by religion becoming superfluous and dissolved into a civil religion of democratic legal institutions (Rokkan, 1999; Meyer, 2005), or by integrating and transforming religion into 'public religions' (Casanova, 1994).

Both the structural and the ideational argumentation broaden the cultural analysis of social policy beyond the conventional wisdom of political sociology, and both have gained momentum since the 1960s and still more since the 1990s, as class politics as a basis for welfare-state analysis waned and cultural politics increased, as Michael Hechter (2004) has analysed convincingly. He argues that the rapid expansion of direct democratic rule since the 1960s has promoted status politics along lines of ethnicity, religion, nationalism, gender, and sexual orientation. One may add that the breakdown of the Communist bloc has, since the 1990s, accelerated this process of 'cross-cutting principles of group formations' (ibid.: 404). Status, understood as *Stände* or style of life in the sense of Max Weber, is obviously linked to culture much more than to economic affinities such as class (Lepsius, 1990). Similarly, Pierre Bourdieu's core concept of the political field and his influential analysis of the practices and institutions involved in the paradoxical phenomenon of political representation contributed to a cultural perspective (Wacquant, 2005).

Following the method of Birgit Pfau-Effinger, my analysis of welfare cultures will not extend to the whole complex of values, institutional traditions and practices of welfare states, but be limited to the 'relevant ideas' surrounding welfare policies, comprising a 'stock of knowledge, values and ideals' (2005: 4). There are practical reasons for this limitation, but theoretical ones as well, especially when analysing the religious dimension of modern welfare states. The practical reason is simply that, for the comparative analysis of welfare states, a comprehensive cultural perspective – such as that developed within the anthropological tradition (Wimmer, 2005) – still lacks adequate methodologies. A comprehensive cultural analysis has to include qualitative data, which have to be integrated into a kind of a typology of 'ideal types' in the Weberian sense in order to be comparable. But such typologies, as for example the welfare-regime approach mentioned, need theoretical clarifications which cannot be derived directly from empirical data, whether qualitative or quantitative. The few efforts to analyse the religious foundations of modern welfare states by quantitative comparisons (e.g. Castles, 1994; Hornsby-Smith, 1999) have not succeeded in explaining causal links. Therefore I concentrate in the following on the level of religious ideas within welfare state development.

Religious ideas are embedded within the multi-dimensional reality of social policy. My analysis will take three steps to cover this complexity. In

the first step I take the recent theorizing on the 'new institutionalism' as a heuristic device, starting with a distinction developed by Ellen M. Immergut (1998), which will be modified. The body of religious analyses of welfare states can be distinguished according to four types of idea foundation (micro-, meso-, macro-, and meta-). This systematic perspective underlies my limitation to the legitimizing meta-level idea foundation ('cultural institutionalism') affording a qualitative perspective (discourse analysis). The second step picks up on some controversies within Christian social-policy discourses which reflect not only political values and camps, but can also be traced to distinct traditions within Christianity. In the third step the perspective becomes broadened to a comparative typology of world religions and their respective welfare values. This broad perspective sheds light on the quite singular position of Christian religion in the development of welfare states. It makes clear, however, – following Talcott Parsons' analysis of 'secular humanism' – that only a specific combination of Christian and secular humanist traditions helped the modern welfare state into existence. In the final section of the chapter the view is turned back to the future role of Christian foundations in legitimating the modern welfare states.

WELFARE-POLICY PROBLEMS AND RELIGIOUS LEGITIMATION: FOUR THEORETICAL APPROACHES

Even in 1989 Franz-Xaver Kaufmann could still argue that the role of Christianity has been a mostly neglected topic in research on the development of the modern welfare state. Yet he pointed to three aspects of its influence: first, the idea of human godlikeness, in which are combined the institutionalized equilibrium of monarchial and papal authority, the foundations of human rights, modern differentiation of societal subsystems, and welfare state inclusion; second, the role of religious protest and its socio-ethical relevance, especially in England; and third, the interplay between a conservative Protestant concept of the state and Catholic-influenced Christian-social movements, as shown in the German case where those movements in particular, gained central importance for the practice of German social policy (Kaufmann, 1989).

Since then the state of research has impressively improved. In order to systematize this research I employ and extend a theoretical frame developed by Ellen M. Immergut in her much-cited 1998 article on 'the theoretical core of the new institutionalism'. This theoretical movement started with a critique of the political-behaviour movement of the 1950s and 1960s

and led to three assumptions – 'that preferences or interests expressed in action should not be conflated with "true" preferences, that methods for aggregating interests inevitably distort, that institutional configurations may privilege particular sets of interests and may need to be reformed' (ibid.: 8). Basically, the 'institutionalist tradition seeks transcendent or overarching norms to guide political behavior' (ibid.: 11). Immergut distinguishes three separate branches of scholarship of the 'new institutionalism': rational choice, organization theory, and historical institutionalism. I would add, as a fourth branch, cultural theory as an institutional theory (similarly Grendstad and Selle, 1995).

To analyse the Christian, and by extension, religious dimension of welfare policies, I concentrate on the cultural dimension within all four theoretical branches, thereby (with Immergut) neglecting the competing paradigms of behavioralist/utilitarian and social determinist/Marxist thinking. Interestingly the three branches discussed by Immergut can be traced to three classical levels of sociological analysis: micro-, meso-, and macro-. I will add as a fourth the meta-level, the level of symbolic legitimation.

The Rational Choice Approach and Micro-level Analysis

The rational choice approach conceptualizes institutions as decision rules, discusses preferences as strategic choices, sees the aggregation problem as the cycling of preferences, and considers normative standards impossible. The level of analysis is micro-. If the most advanced scholarship in this field researches 'rationally' grounded values as 'ultimate' values in religious life, these are thought of as 'cognitive expectations' (Esser, 2003: 185). The (subjective) micro-perspective is theoretically based in psychological thinking (Hitlin and Piliavin, 2004), and its application to the sociology of religion employs economic rationality on a broad scale to explain the role of Christianity in the development of modern society in general (Stark and Finke, 2000; Stark, 2005).

Of course, the micro-perspective is not limited to rational choice theory in its strict sense, but forms the methodological basis for the impressive array of survey research on religious values and attitudes, such as the World and European Values Studies (Halman and Riis, 2003b; Norris and Inglehart, 2004; for a broader sociological perspective on values see Joas, 2000). Within the research on the religious dimensions of welfare policies authors like Francis G. Castles (1994) or Michael Hornsby-Smith (1999) employ aggregated (micro-)survey data to explain the relevance of Catholic and Protestant population proportions, and the continuity of a chiefly religious divide in post-Reformation Western Europe.

Organization Theory and Meso-level Analysis

The organization theory approach focuses on the meso-level of sociological analysis. It considers institutions as information-processing routines and classification systems, preferences as bounded rationality and interpretative frames, the aggregation problem as standard operating procedures, and the problem of norms as organizational learning. Within research on the religious dimension of welfare policies this perspective focuses on parties and organizations (*Verbände*), for example in the path-breaking study of Kees van Kersbergen (1995) on the role of Christian democratic parties and movements within the development of a 'social capitalism'.

However, van Kersbergen extends his analysis to the macro-level by taking into account the varying historical, economical and political conditions under which parties and organizations act. Contrary to Esping-Andersen's 'absence of an independent "Catholicism" effect after 1950' (1990: 118; similarly Therborn, 1994: 106), van Kersbergen identified such an effect by distinguishing between the 'grand tradition' of Roman Catholicism, embodied in faith and Vatican doctrine, and the 'lesser tradition' within Christian democracy, with only the latter and the organizational institutionalists' perspective making the difference.

Historical Institutionalism and Macro-level Analysis

The branch of the historical institutionalists draws in particular on the work of Max Weber. They take a macro-approach, focus on rules, procedures, norms and legacies, and see preferences as 'alternative rationalities' and the construction of interests. The representation of economic and political interests in their perspective is shaped by the collective actors and institutions that have left traces in their own history. More recently they include, since the 'interpretative turn' in the social sciences, constructivist and 'postmodern' elements: 'the role of ideas has been given greater weight' (Immergut, 1998: 17).

Analysts of the religious dimension of welfare policies such as Theda Skocpol (2000) for example argue that the American welfare state does not appear as a 'laggard' of the European social democratic model but as a unique configuration of programmes and agencies forged from political struggles within political institutions and fed by religious motives as well. Frank Nullmeier and Friedbert Rüb (1993) remark that the Catholic tradition played a more important role in German pension policy than previously recognized. And in the Weberian tradition it is the school of Stein Rokkan and Peter Flora which has analysed the importance of culture and religion for the European welfare state (Rokkan, 1999; Fix, 2001).

Cultural Institutionalism and Meta-level Analysis

The fourth approach, in part included in historical institutionalism by Immergut, cultural institutionalism – as one could label it – pins down endogenous preference formation and rehabilitates concepts like function-alism from the sociological heritage of Talcott Parsons, especially that of his late works (Parsons, 1972; 1978). In this perspective culture is concep-tualized as the independent variable. Accordingly, this approach focuses explicitly on the meta-level of society, on the legitimizing role of culture and religion (Opielka, 2007). Historically, the 'political culture' approach developed by Gabriel Almond and Sidney Verba in their famous 1963 study *The Civic Culture* marks the starting point for policy analysis, although little explicit research in this tradition has focused on welfare policies up to now.

From Parsons' action-theory, the components of culture can be thought of as systems of ideas and beliefs, value systems, and systems of expressive symbols, although Parsons sometimes referred to culture exclusively as symbolic systems. Culture, in this perspective, is shared, transmitted, and learned (Eckstein, 1996: 491). The concept of 'civil religion' (Bellah and Hammond, 1980) has been a practical application of this theorizing. Against repeated criticism (Johnson, 2003), the culturalist approach gained momentum through the 'cultural turn' in the social sciences (Reckwitz, 2000). Jeffrey C. Alexander's 'cultural sociology', as 'a kind of social psy-choanalysis' (Alexander, 2003: 4) concentrating on the unconscious spheres of society and building on Parsons' and Robert Bellah's 'symbolic realism' as well as on the newest developments in anthropological research, makes an important point: 'If we understand how the insights of Weber's *Religionssoziologie* can be applied to non-religious domains of secular society, we need a cultural sociology' (ibid.: 8). I will draw on this agenda for the next parts of this chapter. This does not neglect insights from the three other approaches, but refers to them where needed.

The four levels of analysis: micro- (rational choice), meso- (organiza-tional analysis), macro- (historical institutionalism) and meta- (cultural institutionalism), can be viewed as logical (ontological) distinctive (see Opielka, 2006). It should be noted that the distinctions proposed find some equivalent in the debate on secularization within the sociology of religion. Karel Dobbelaere argued that one should speak of secularization only when referring to all three dimensions – micro-, meso-, and macro. He mentioned first: individual secularization ('religious involvement'), organizational secularization ('religious change') and societal secularization (Dobbelaere, 2004). Eventually, the fourth, meta-level could be added to his inclusive argument, although Dobbelaere and, following him, Mark Chaves (1994)

thought that the sociology of religion should emphasize the structural changes more than the analysis of meaning systems. Secularization on this level would mean that secular religions are gaining importance. I will pick up this option in the third section of the chapter, but concentrate next on controversies within the Christian discourses on welfare policies.

CHRISTIANITY AND WELFARE POLICY CONFLICTS

Cultural institutionalism interprets cultural codes and symbols embedded in institutions. The oldest and up to now best-organized institution within Christianity is the Catholic Church. In his first Encyclical Letter *Deus caritas est*, published on Christmas 2005, Pope Benedict XVI, the German theologian Joseph Ratzinger, starts by focusing on the centre of Christian faith: ' "God is love, and he who abides in love abides in God, and God abides in him" (John, 4: 16). These words from the First Letter of John express with remarkable clarity the heart of the Christian faith: the Christian image of God and the resulting image of mankind and its destiny.' The larger, Part II of the Encyclical Letter is devoted to 'Caritas – The practice of love by the church as a "community of love" ' featuring the welfare activities of the Roman Catholic church itself (as *opus proprium*) and the promotion of welfare policies through their laity: 'The direct duty to work for a just ordering of society, on the other hand, is proper to the lay faithful' (Chapter 29, see www.vatican.va; Benedikt XVI., 2006). Consequently the papal document refers in central passages to Saint Augustine ('If you see charity, you see the Trinity'), which is interesting in two directions. Augustinian doctrine has been extremely influential in the development of Christian thinking. The dissertation of the Jewish philosopher Hannah Arendt on Augustine's concept of love is a remarkable document for its influence on individual ethics (Arendt, 2005). The second influence, on political ethics, is shown for example in Ratzinger's dissertation (from 1951) on Augustine's concept of the Church as 'Civitas Dei', and in the firm stand within the patristic doctrine of the 'two states' where the Church 'itself cannot become something like a state' (Ratzinger, [1951] 1992: XVII; translation by the author). In this Augustinian perspective – taken up as well by Martin Luther – the 'limits of politics' and the enduring, conflicting existence of 'the good, the bad, and the ugly', '*caritas* locked in combat with the contending force of *cupiditas*' (Elshtain, 1995: 34, 36) design the reality of social life and therefore, that of today's welfare policies. I shall take as an example of this the current welfare discourse in the USA.

The first of a series published as 'Pew Forum Dialogues on Religious and Public Life', endorsed by Jean Bethke Elshtain, brought together two prominent American welfare-policy theorists, Mary Jo Bane and Lawrence M. Mead (2003). Both present explicitly the religious basis of their very different approaches to poverty and welfare-policy decisions. Their controversy demonstrates strongly the legitimizing role of religious thinking within Christianity on central social-policy topics like the work ethic, or subsidiarity and solidarity as concepts of legitimating state intervention. Bane rests her arguments on a reading of Social Catholicism which asserts a 'preferential option for the poor'. She speaks of her 'Catholic sensibility', 'shaped every day by prayer and worship' (ibid.: 48), and that develops, in part, from her 'Catholic imagination', that 'at its best is hopeful rather than despairing, trusting rather than suspicious, more generous than prudent, more communitarian than individualistic' (ibid.: 14). It leads her to such principles as 'basic human rights' or a 'limited support for a market economy' (ibid.: 15). However, she is not critical of work requirements because of an 'argument voiced by many welfare recipients themselves: that they needed the push of a work requirement to overcome their own lack of initiative in finding jobs or training experiences' (ibid.: 47). But she avows 'generosity', especially with regard to the time limits imposed by the 1996 welfare reform (ibid.: 48–9). Mead, a well-known critic of welfare 'as we know it', argues from a quite individualistic reading of the Gospels stemming from a history of membership in a small Protestant denomination. For him work is neither a right that society must guarantee nor mainly even just a chance to participate in society as Bane argues, but an obligation that the poor owe to society in return for what it gives them. 'There is no preference for the poor' (ibid.: 9), so Mead, who calls for 'tough love' and borrows a phrase, found in the Episcopal Book of Common Prayer that 'those who would be free must first be bound' (ibid.: 10).

The Catholic and the Protestant legitimation of welfare policies as presented by Bane and Mead shed a light on differences in practical politics. Bane labels herself a Democrat 'somewhat left-of-center', while Mead belongs to the Republican camp of policy advisors. The question: 'Who will provide?' (Bane et al., 2000) lies at the heart of the religious-value discourses which have characterized American social-policy debates since the nineteenth century (Skocpol, 2000). The theme of the 'transformation of the welfare state' (Gilbert, 2002) with a religious focus can be found in the ongoing national welfare debates. While in the United States the National Conference of Catholic Bishops in their famous 1986 letter on 'economic justice for all' still put the welfare-rights perspective in the foreground (Adloff, 2006) – as did the German Catholic and Protestant churches in their 1997 ecumenical document 'For a Future in Solidarity and Justice'

(*Für eine Zukunft in Solidarität und Gerechtigkeit*), the German Catholic bishops endorsed the 'activation' policies of the former German 'red-green' government in a controversial paper, *Impulswort*, published at the end of 2003 (Opielka, 2004b; Liedhegener, 2006).

One may wonder whether these religious intimations are anything more than a complimentary cultural echo to a shift in mainly political values, away from rights and towards obligations, in the politics of social assistance and unemployment, the fusion of religious and welfare-politics serving mainly politically to secure a conservative clientele in elections, as an element of 'moral politics' (Lakoff, 2002). Although this might be the case to some degree, it can be viewed, too, as part of a 'desecularization' move-ment – as Peter L. Berger (1999) has called it – with many recent examples and not only in the USA. The Bush administration offers federal employ-ees a 'Catholic health plan' that specifically excludes payment for contra-ceptives, abortion, sterilization and artificial insemination as part of a $1 billion project to involve religious organizations in all types of federal social programmes (*New York Times*, 25 September 2004). A 50-state study, the 'Roundtable on Religion and Social Welfare Policy', supported by the Pew Charitable Trusts, pointed to a mostly supportive environment for the 'Faith-Based Initiative' of the Bush administration, which promotes con-tracting between government agencies and religious charities without obliging them to neglect their religious identities (Ragan et al., 2003). As Frank Adloff (2006) remarks, the increasing structural and cultural impact of the Catholic Church and its charities on American social policy has been poorly researched up to now. The basic affirmation of social rights, egali-tarianism and empowerment, and the strong alignment with trade unions since the beginning of the twentieth century, became characteristics of American Catholicism, while American Protestantism is much more split among political camps: 'On the national level, religious conservatives were the strongest advocates of charitable choice provision, political and reli-gious liberals being its most vehement opponents. This mirrors a long-standing division within American religion' (ibid.: 21; see, too, Smith, 2000 and Wuthnow, 2005).

Religious reasoning emphasizes an important task for welfare-state analysis. Kees van Kersbergen demonstrated in his study of the long-overlooked role of Christian Democracy for the development of the welfare state in Europe that the debates within Catholicism between charity and social justice contributed immensely towards legitimizing a modern concept of social citizenship (Kersbergen, 1995: 192–204). In Germany, family policy was until the end of the 1990s the domain of the Christian Democrats. Both major reforms of the past 20 years – the introduction of parents' allowances in 1986 and the reform of the laws for the help for

young people in 1993, which came with a guarantee of kindergarten place-
ment for every child over 3 years in Germany – have been more or less the
accompanying result of new abortion regulations. Both reforms liberaliz-
ing abortion were heavily disputed, especially from within the Catholic
Church. The new benefits for families have been viewed as kind of a com-
plementary deal, improving the situation of families in order to lessen the
need for taking advantage of the liberalized abortion law. The 'structural
neglect of the family' in German social policy, as Franz-Xaver Kaufmann
has criticized, may be tackled eventually only by religious legitimation
(Kaufmann, 1989). In the meantime the Social Democrats and Greens have
gone ahead and formulated explicit family policies (Bleses and Seeleib-
Kaiser, 2004; Opielka, 2004a). The conservative-communitarian promo-
tion of family labour (respectively, care work accomplished in families
mainly by women) and family values has been pushed strongly by both
Christian churches, not only in Germany but in other European welfare
states as well (Fix, 2001).

THEORETICAL DIMENSIONS OF RELIGIOUS WELFARE VALUES

If we take a deeper look at what legitimates the complex solidarity
of modern welfare states we find a broad literature mainly focusing on
two aspects: conceptions of justice and interest configurations. In recent
times some scholars see, under the term 'ethics of the welfare state', value-
legitimations. However, little research exists reflecting the religious founda-
tions of welfare states. With the exceptions of Franz-Xaver Kaufmann's
analysis of the Christian roots of the European welfare state (Kaufmann,
1989; 1997), Elmar Rieger and Stephan Leibfried's work on the develop-
ment of welfare states in East Asia (Rieger and Leibfried, 2003; 2004), van
Kersbergen's study already mentioned, Ka Lin's exploration of the
'Confucian welfare cluster' (Lin, 1999), and Philip Manow's discussion of
the Protestant roots of Swiss and Scandinavian social policies (Manow,
2004; for Scandinavia see also Lin, 2005), most researchers seem to avoid
treating religion as an external variable of decision-makers or national cul-
tures, or even as an independent variable belonging at the centre of social
policy analysis. Up to the early 1990s this seemed a quite negligible problem
because cultural or religious factors have seldom played a role in compar-
ative research on the welfare state. Moreover such a theoretical perspective
has been restricted to Europe with the running assumption that in the rest
of the world – with the exemption of the USA, Canada, Australia and New
Zealand – there are no welfare states at all.

The theory of welfare regimes developed by Gøsta Esping-Andersen (1990) distinguished three types of welfare regimes – the conservative, liberal and social democratic or socialist type – but all three were taken exclusively from the European, or respectively, the Anglo-Saxon world. In the 1990s the picture changed. Mainly as a consequence of the fall of the Iron Curtain and the following globalization debate, researchers realized that in all parts of the world welfare-state arrangements have been rapidly developing, in part for dozens of years, in part for shorter periods. One realized, for example, that nearly all Arab-Islamic states had installed social policies, some of them – like Iraq under Saddam Hussein – on a fairly large scale (Loewe, 2004; Heyneman, 2004), and one could observe more and more extended social policies in Asia (Aspalter, 2001; Gough and Wood, 2004; Croissant, 2004; Walker and Wong, 2005).

Additionally Huntington's (1996) thesis of a 'clash of civilizations' stimulated a broadening of the comparative perspective. He employed a typology of 'civilizations' grounded in the world religions. Half of its eight types are based on the Christian tradition, at least since the advent of modernity and colonialism: Western, Orthodox, Latin-American, African (versus the Islamic, Hindu, Sinic and Japanese). However, Huntington's types fuse quite unsystematically the religious and other cultural levels, which is astonishing because in his empirical analyses, for example on the consequences of Latin-American immigration into the USA, he shows intriguing insights into the tensions between religion and politics (2005: 81–107). Interestingly he, as most students of government in the political sciences, ignores social policy and therefore cannot contribute directly to our topic. But his culture-clash hypothesis has become itself an empirical, ideational fact in academic social sciences, and may, if unreflected, mislead comparative research. Huntington's essentialist conflation of culture and religion abuses categories as stereotypes.

The methodological problem of discriminating the role of religion in welfare-state analysis has been discussed in a controversy between Francis G. Castles and Göran Therborn over the question of whether a 'Catholic family of nations' exists in Western and Southern Europe. Castles argues carefully that a 'prima facie linkage between measures of Catholic adherence and a wide variety of policy outcomes' can be shown, but 'without any detailed account of the actors involved in the policy-process or the channels through which policy outcomes are determined' (Castles, 1994a: 20). Therborn (1994) doubts whether Catholicism as an independent variable holds for the results, especially concerning female labour-force participation (as policy outcome), because other variables – for example regional differences – do not count less. Castles' reply, however, points towards possible future research by focusing on a deficit in welfare-state research, on

'the great body of those who have contributed to the battle between pro-
tagonists of the industrialization and "politics matters" paradigm in com-
parative public policy analysis . . . without noticing that other things
matter as well' (Castles, 1994b: 112).

One may doubt whether patterns of covariance are the most promising
research path to explaining religious influences in contemporary welfare
states. A broad body of research and discussion has emerged in com-
parative social-policy analysis on identifying dependent and independent
variables, and especially on explaining welfare state reform. Stiller and
van Kersbergen (2005: 17–18) made the argument that the concept of
'ideational leadership' can help explain why welfare states do experience at
least some far-reaching reforms – although the advocates of the 'path-
dependency' paradigm, and other policy analysts, doubt whether such
reforms are possible at all. Against the 'implicit conservativism' of this par-
adigm (Beyer, 2005), the concept of 'ideational leadership' – characterized
by a rejection of the status quo – advocates the legitimation of new policy
principles, an appeal to reform critics, and efforts to build political coali-
tions. Overcoming institutional and electoral obstacles is a complex task
which cannot be evaluated without accurate qualitative research methods.
As mentioned, historical institutionalism, which focuses on the ideational
processes in social-policy development, has emerged as an influential theo-
retical perspective in social-policy studies (Béland, 2005; Lieberman, 2002).
Concerning the value programmes of the leading actors in those processes,
it may be helpful to focus on religious dimensions as well. It is obvious that
these dimensions cannot be restricted to the classical European religions:
to Catholicism and Protestantism have to be added Orthodoxy, Judaism
and atheism, making a quintet.

There is therefore the need for typologies of religion in order to com-
bine them with the classification of welfare regimes. 'Multiple modern-
ities' contain, as Shmuel Eisenstadt has theorized, 'multiple religions'
(Eisenstadt, 2000). The growing awareness of the complexity and plurality
of religions in the sociology of religion and in the sciences of religion has
diluted the traditional quintet or septet of world religions – Christianity,
Islam, Judaism, Buddhism and Hinduism, plus Confucianism and Daoism
(Juergensmeyer, 2003). Some scholars even argue that political ideologies
such as Communism or Fascism should be included because they represent
values as strong as those of traditional religions (Hoffmann, 2003;
Steigmann-Gall, 2003). Others such as Danièle Hervieu-Léger start out
more sceptical towards an extended concept of religion and would limit it
to those 'chains of memory' which constitute 'religion as a particular form
of belief and one that specifically implies reference to the authority of a
tradition' (2000: 4). But she also realizes that the conceptually indispensable

length of those chains is not easy to determine. Therefore it seems to me more fruitful to build on an inclusive but theoretically grounded typology of religions.

Recent developments within welfare regime theory have shown a tendency moving from the underlying and sometimes hidden assumption of convergence, towards divergence or diffusion, which has resulted from the use of more qualitative research methods, and the development of welfare 'clusters'. 'Though the regime theory originally focused on social stratification, social rights and labour market, it fosters the birth of the cultural study' (Lin, 1999: 21–2). Lin proposed, in his study of the 'Confucian Welfare Cluster', a more phenomenologically structured typology of welfare clusters, or types of welfare regimes, and their normative foundations (ibid.: 177). I will concentrate on the question whether certain religious 'clusters' are related to certain types of welfare regimes and their founding ideas concerning ideas of work, family and solidarity. I propose thereby a distinction between *thin* and *thick* concepts of religion, or, as was noted by Richard Madsen and Tracy B. Strong in a reader on pluralist ethics, between 'procedural' (classical liberalist, critico-theoretical or feminist) and 'perfectionist' (religious) concepts of values (Madsen and Strong, 2003: 2–3).

Parsons argues that religion is the social subsystem which organizes, through 'ultimate values', the society's relations to an 'ultimate reality'. For Parsons the religious subsystem however is part of the 'culture' system, which is not part of society but a system of meanings – external to society, such as the personality or biological system (Parsons, 1978) – relying upon an epistemology ('eternal objects', as derived by Alfred N. Whitehead) (Opielka, 2006). Religion in this perspective is mainly viewed as a symbol system (Cassirer, [1944] 1992; Vogl, 1999). Such a concept makes sense because religious texts or world views bear an inner structural logic not directly reducible to social actors and systems, although, as Randall Collins has shown, the development of ideas and values is always connected to social actors and systems (Collins, 1998). It seems important to identify those parts of the social system which are the bearers of religion and other cultural phenomena: the individual, organizational, and societal structures and institutions as discussed in the first part of this chapter. But, aside from the technical critique, Parsons' focus on 'ultimate values' is striking. It is worth mentioning that a definition of the social subsystem religion by 'ultimate values' must include both a systems perspective on the meaning derived from an 'ultimate reality', and an action-perspective on religion as ritualized practice towards this reality and evoking thereby those values (Pollack, 2003). Berger described the societal result of religions: 'The fundamental "recipe" of religious legitimation is the transformation of human

products into supra- or non-human facticities. The humanly made world is explained in terms that deny its human production' (Berger, 1967: 89). One could view this focus as basis for a thick definition of religion (opposing the narrow definition of traditional religious studies): religion is theory and practice, doctrine and ritual of ultimate values. In this way doctrine and meaning is dialectically coupled to the complex web of institutional practices as discussed in the first section of the chapter.

The argument for such a dialectical view may become clearer if we look upon the institutional side of society. What could be the criteria for judging which religion may be acknowledged as one, with all the attendant privileges? Welfare conceptions of religions are one indicator of their social relevance; I refer thereby to Hanegraaff's (1998) distinction between 'religions' – having societal impact – and 'spiritualities' – as individualistic manipulations of magic. I endorse a broad concept of religion, a theory of multiple religions (more details in Opielka, 2003b; 2007). It starts from the definition that religion organizes societies' relations with 'ultimate values', and the communication with those spheres of the world which are taken to be the source of those values. Corresponding to a Neo-Parsonian theory of the fourfold division of society (Opielka, 2006), one may distinguish four logically different types of religious foundations:

1. the *scientific religions* (for example, Marxism) (Level 1 – grounding ultimate values in the material sphere of nature);
2. the *subjective* (or *psychological*) *religions* (for example, psychoanalysis or Nietzscheanism) (Level 2 – grounding ultimate values in the subject/individual);
3. the *communitarian religions* (for example, Confucianism) (Level 3 – grounding ultimate values in the social sphere itself);
4. the *spiritual religions* (for example, Christianity, Buddhism or Islam) (Level 4 – grounding ultimate values transcendentally, beyond nature, person, and society).

It is very important to mention that a logical hierarchy in the Parsonian tradition is by no means a valuing hierarchy, because the four levels are logically irreducible.

As we can see in Table 5.1 the reference areas of the four levels are four: the material world for the scientific religions; the subject and its inner world for the subjective religions; the particular community for the communitarian religions; and the spiritual world for the spiritual religions. Within the latter one can find the same analytic order again, and expect that the logic can be found within every cell itself, just by looking at the enormous differentiations within the (traditional, spiritual) world religions, for

*Table 5.1 Functional types of religion and social policy**

Functional type of religion	Scientific religion (L1)	Subjective religion (L2)	Communitarian religion (L3)	Spiritual religion (L4)			
				Daoism (L1)	Islam Judaism (L2)	Christianity (L3)	Buddhism, Hinduism (L4)
Specified religions	Marxism (materialism)	'Psychoanalysis' 'Nietzscheanism'	Confucianism				
	Secular humanism			religion			
Subsystems of reference in differentiated societies *(ethical values)*	Science	Human rights	Civil religion				
	(Truth) Freedom	*(Human rights) Equality*	*Solidarity*	*(spiritual) justice*			
Image of god	Natural logic	'Übermensch' (Super Human; Nietzsche)	Holiness of the worldly (Tao)	Tao (Way)	Monotheism	Monotheism	Nirvana ('a-theos'), spirit
Types of justice	Need	Achievement	Status	Spiritual (divine) justice			
Ideologies of social policy	Socialism	Liberalism	Familism ('Xiao')		Self-help, paternalism	Social market	
Types of welfare states	Communism, strong welfare state	Minimal state	'Confucian welfare state'			Social insurance state	

Note: The abbreviations L1 to L4 mark the four analytical levels of social action within a sociological approach developed mainly from Talcott Parsons' so-called AGIL-theory: Level 1 marks the adaptive, Level 2 the strategic, Level 3 the communicative and Level 4 the meta-communicative mode of action and system building (Opielka, 2006).

Source: Modified from Opielka (2003a).

example Shia and Sunna or Protestantism and Catholicism, as mentioned in the controversy between Bane and Mead above.

I pick out three of the presumably most uncommon elements of this functional perspective, which will help categorize not only religion and welfare policies on a global scale, but also shed new light on the heritage of cultural values in Europe (Joas and Wiegandt, 2005).

First, why are scientific and subjective ('existentialist') world views included in a typology of religion? For most researchers of religion, Marxism and other world views which are or claim to be based on scientific knowledge (such as socio-biological Nazi ideology) do not count as religions but merely as agnosticism, atheism, or nihilism. Marxism, in its strong variant of Stalinism (Hoffmann, 2003), as well as in its weaker version of critical theory (Mendieta, 2005), insists on the this-worldly nature of redemption which can by scientifically understood ('historical materialism') and politically promoted, with the final goal of the strong welfare state in a Communist society. Concerning the inner-worldliness of their value foundation, Communism and Fascism seem close, although with remarkable differences. The Nazi effort to establish a kind of religion to overthrow Christendom by combining some of its elements with a mixture of neo-paganism and racial theories (Steigmann-Gall, 2003) must be put among the scientific religions. Recent research by Götz Aly (2005) has shown that the German form of fascism combined racist political religion systematically with a strong social policy. All scientific religions also tend to be active in the formation of societal structures for inner-worldly redemption; they develop complex doctrines and ritualized practices.

When Parsons argued that secularization has to be viewed as the internalization of religious values into societal institutions, norms and values, he focused on the Judeo-Christian tradition (Parsons, 1978: 240–1). Marxist and humanist traditions he labelled as 'secular humanism'. Scientific and subjective (or 'psychological') religions both argue that 'ultimate reality' is to be found either in the empirical (material) sphere or within the individual (their will). Both religions count as 'secular' world views. For adherents of 'subjective religion', as secular adherents of psychoanalysis (Rustin, 1999; Black, 2006), human rights have the quality of 'ultimate values' because they see within the individual the final source of all values. They neither understand nor accept that, for believers in 'spiritual religions' – who identify not the individual but rather God (or different conceptions of God) as the 'ultimate' source of human rights – human rights may be extremely important in the social, and especially, political sphere (Spickard, 1999). The only real agnostics or nihilists – and so far the only non-religious and truly 'secular' world views – would be those who simply refuse *any* search or hypotheses concerning 'ultimate values'. Such

hedonistic, or extremely pragmatic, 'procedural' theories exist, but in an overview of the history of philosophy they make for only a small fraction of societally relevant world views. The great advantage of such a broad concept of religion – well in line with such recent debates in the sociology of religion as Thomas Luckmann's concept of 'invisible religion' (Luckmann, [1967] 1991; 2002) and the sciences of religion (Kippenberg and Stuckrad, 2003) – lies in its eye-opening competition between all theories and – making it important to speak of 'religions' and not just philosophies or ethics – practices of 'ultimate values'.

The second element which may seem innovative is the functional order within the spiritual religions themselves. We distinguish the common 'world religions' – Confucianism being excluded, with some reason, from the spiritual religions – by the same logical system of functional references and modes of action. To employ a more metaphorical use of the logical references, one could say that Daoism views the spiritual world as spiritual economy; Judaism and Islam conceptualize the spiritual world as God-ridden, as a world of God's laws or spiritual politics (see Khoury, 2006 for Islam); Christian religions put emphasis on the community of God and mankind (which goes beyond the Jewish 'bond' between God and His chosen people) created by the basic similarity between God and Human, and – especially in Catholicism – the concept of spiritual community with Christ (within liturgy), with the saints and as a community of believers; and the more esoteric religions which see the whole world as spiritually driven (Hinduism, Buddhism) or which gravitate between the methodologies of religion and sciences (such as Anthroposophy or, mixing humanist philosophy and esotericism, Freemasonry) (Opielka, 2007).

Jan Assmann has developed a theoretical perspective on religion as 'cultural memory', which transcends and permeates particular traditions, symbols and rituals (Assmann, 2006). However, any inclusive typology lacks the differentiations needed for a vivid picture of reality and, moreover, it should be viewed as showing only 'ideal types' in the sense of Max Weber (Kippenberg, 2002). The reality is, by contrast, mixed. The need for such typologies is obvious: they are, as part of a grounded theory, an unavoidable tool for empirical research which otherwise remains phenomenological and could not permeate to an explanatory level.

The last point concerns the social-policy side of the typology. The indicators in the left column of Table 5.1 cover the meaning dimensions of the religious-value basis of welfare policies, without going into depth on their structural and institutional features. Insofar as they may not be self-explanatory, I refer to other publications (Opielka, 2003a, b; 2007). One of the most striking aspects of this analytical typology may be the fact that at the lowest logical level (1 – scientific religions) appears the most utopian

idea of a welfare state, while the highest level (4 – the spiritual religions of
Buddhism and Hinduism, as well as the Western esotericism of freema-
sonry, anthroposophy, and the 'New-Age religions') seems to represent the
least-developed welfare-state conceptions. The shaded fields reflect not
only a lack of research but probably a 'lack of modernization' of those
world religions which have a marginal input of 'ultimate values' for the
development of modern welfare states. Of course this may change, and one
can observe already some inspiring contributions among those shaded
areas, an example being the Buddhist concept of compassion as a basis for
a social and environmental ethics which bridges the gap between social and
environmental policy. Also promising are always the mixtures of different
religious strands, as in Buddhism and Marxism in Taiwan and East Asia
(Pye, 1989; Jones, 2000); Confucianism and Marxism in China (Chow,
1987; Bell and Chaibong, 2003; Wong and Wong, 2004); or Christianity
and Marxism respectively in social democracy (Kaufmann, 1989; 1997;
Kersbergen, 1995). The question, why within the Christian tradition the
welfare state has been developed first and foremost, cannot be answered by
a typology alone, of course. But we may argue that the Western combina-
tion of secular humanism and Christianity was the catalyst for combining,
in turn, democracy, work and welfare ethics, and the legal state as the struc-
tural and ideational basis for the modern welfare state.

Up to now there have been few studies focusing on welfare regimes on a
world scale (Esping-Andersen, 1997; Jones, 1993; Lin, 1999; Gough and
Wood, 2004; for an overview see Arts and Gelissen, 2002). Still fewer studies
exist which focus explicitly on the value-basis of welfare regimes (Merkel,
2002). A fruitful analysis of this basis requires a theory of the multiplicity of
religions in order to avoid being overwhelmed by an incredible amount of
theoretical and empirical data. With the 1999–2000 waves of the European
and the World Values Surveys exists an impressive array of cross-national
empirical data on the attitudes of over 80 per cent of the world's population
towards values and beliefs (Norris and Inglehart, 2004; Arts et al., 2003).
Although the findings on religious change have not yet been evaluated
sufficiently (Halman and Riis, 2003b), the data promise at least some plausi-
bility for the use of religious clusters as proposed in the typology here. But
to explain why some values systems could, up to now, develop different types
of welfare regimes, and others not, such as Buddhism or the Hinduism, will
scarcely be explained by the attitudes of the populations alone. It must
include an analysis of the attitudes (and interests) of the respective elites, and
of the overall institutional design of the societies (Welzel et al., 2003).

The discussion of Table 5.1 may have shown that there exist good
reasons, first, to employ a broad concept of religion, and second, to con-
ceptualize a systematic theory of multiple religions. It should be noted that

an 'ideal-type' typology as discussed here does not assume conformity within the ideal types. Indeed, the culture clash hypothesis of Huntington has been rebutted strongly because of this assumption. Several authors have proved empirically that inter-ethnic and inter-religious conflicts within Huntington's 'civilizations' account for nearly all armed conflicts since 1989 (Henderson, 2005). One could question, going much further, the strict separation of those religions which the 'civilizations' are supposed to be based on, and look into the mixtures of religions within families, within individuals themselves, and within an all-encompassing 'world ethic' (Küng, 1991). Additionally, it may turn out that the 'civilizations' themselves change their religious core culture. Aikman (2002) supposes that by the 2030s, one-third of China's population could be Christian, which would change the global position of China markedly. The same would hold true if today's European Muslim minority grew into one-third of the population after an EU integration of Turkey, and demographic changes as well as migration stayed on their present course (Gerhards, 2005).

RELIGION AND WELFARE POLICIES: AN OUTLOOK

Although Christian concepts such as the Catholic principle of 'subsidiarity' or the Protestant principle of 'Preference for the Poor' (Bedford-Strohm, 1993) have penetrated into secular political discourses, one may wonder which institutions in Europe would be able to compete with the Christian churches in the anchoring of ultimate welfare values.

The broad typology of religions discussed in this chapter shows that the religions of 'secular humanism' – the scientific religions like Marxism, or the subjective religions of aesthetics and self-expression – are robust and well-established frameworks for the development of 'ultimate values'. From a Christian point of view this may sound heretical, or at least agnostical. That scientific and psychological explanations of the empirical world could gain the respect of, especially, the Catholic Church, required a long battle. Ever since Georg W.F. Hegel's discussion of 'Belief and Knowledge' (first published in 1802) and Jürgen Habermas' reappraisal of a new coexistence of both modes of evaluation (Habermas, 2005), any Christian foundations of the welfare state have had to be conceptualized in the context of competing value formulations. The European heritage of cultural values brings pluralism of value systems alongside the Christian tradition and into complex combinations with it (Eco and Cardinal Martini, 1997; Joas and Wiegandt, 2005).

What may be the fruits of this conceptualizing for a comparative analysis of social welfare? In a handbook of comparative social policy, James

Midgley lamented the lack of a clear analysis of welfare values. He argues that 'mainstream comparative social policy inquiry has neglected norma- tive and practical issues, preferring instead to pursue classificatory and explanatory activities . . . because the implicit normative preferences in mainstream scholarship reflect the dominance of Western ideologies, they are of limited use in assessing social welfare in societies where different cul- tural and social traditions are valued' (Midgley, 2004: 218). In this chapter one may have found some of these normative issues – reflected perhaps through a Western bias, but perhaps also in spite of it.

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