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CRC 1342

**Glossary of Terms for
Social Policy Generosity**



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of Social Policy** CRC 1342

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CRC 1342 GLOSSARY OF TERMS FOR SOCIAL POLICY GENEROSITY

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ABSTRACT

The present Glossary, developed within the context of the Collaborative Research Centre 1342 (CRC 1342), aims to provide key concepts for social policy generosity research and analysis. In the existing literature, there is a considerable variation in the terminology used to describe “who receives what, under which conditions, and to what extent”. Terms such as “generosity”, “social rights”, “entitlements”, and “coverage” are often used interchangeably, while the conceptual frameworks for these terms also vary. To facilitate a common language and understanding, we propose a glossary of overarching, macro-level concept terms and definitions based on collaborative and iterative discussions within the CRC 1342. The Glossary defines generosity as consisting of two dimensions, inclusiveness and scope of benefits, and categorises social benefits into three main types: Cash, in-kind, and regulatory. This framework, which can be adapted according to different applications such as policy field, regional scope and/or research focus, aims to improve clarity and cohesion for collaborative and comparative research.

Keywords: Social policy, generosity, inclusiveness, scope of benefits, social benefits, cash benefits, in-kind benefits, regulatory benefits, glossary

FOREWORD

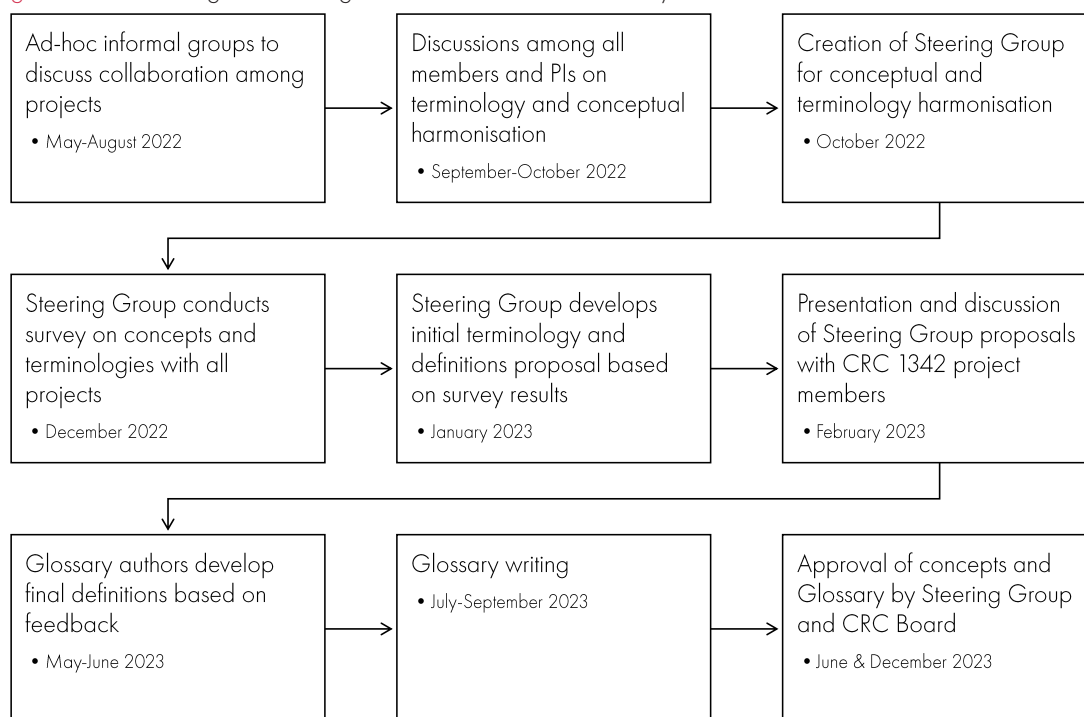
The *CRC 1342 Glossary of Terms for Social Policy Generosity* provides and suggests overarching terms and definitions related to the research of social policy generosity within the Collaborative Research Centre 1342 (CRC 1342) context.

The CRC 1342, primarily based at the University of Bremen and funded by the German Research Foundation (DFG), studies the dynamics and patterns of national social policy developments. It argues that these developments can be explained by the interaction between national determinants and international and transnational interdependencies (CRC 1342, 2021; n.d.). Designed to run for 12 years, the first phase (2018-2021) focused on the study of the introduction of social protection worldwide. In its second phase (2022-2025), the CRC aims to measure, describe, and explain social policy developments in terms of *generosity*, which is to say, the expansion and/or retrenchment of benefits and inclusion of social groups.

The CRC 1342 consists currently of 14 content-related projects and one information management project (INF). The content-related projects are organised into two main pillars. The A-pillar comprises six projects that focus on the study of generosity from global and historical perspectives. The policy fields covered by these projects include work-injury compensation, unemployment, old-age pensions, labour law, healthcare, education, family policies, and long-term care. The B-pillar encompasses eight projects that examine social policy generosity through case studies and small-N comparisons for specific policy fields. These projects analytically focus on national and international/transnational interdependencies, such as war, economic crises, pandemics, international organisations, and transnational flows of ideas (CRC 1342, 2021; n.d.).

The cooperative and comparative nature of the CRC 1342 calls for a shared understanding of the phenomena at hand. This Glossary attempts to contribute to ongoing project work by bringing clarity to concepts and terms vastly used by the CRC. Its primary aim is to facilitate and enhance cooperation among the projects in harmonising overarching, macro-level terms and concepts.

Figure 1. Process design for creating the definitions and the Glossary



Source: Own presentation.

Figure 1 illustrates the process of developing overarching definitions of social policy generosity for the CRC 1342, and assembling the present Glossary. In August and September 2022, project representatives held ad-hoc meetings to enhance collaboration within CRC 1342, and decided to develop shared terminologies and definitions for the organisation. Two significant discussions, the CRC Retreat on September 30th and another with Principal Investigators (PIs) and interested parties on October 12th, affirmed the need for shared guidelines, particularly for publication and data collection. Subsequently, a Steering Group¹ consisting of representatives from five research projects was formed to coordinate the process of developing shared overarching concepts and terms.

In order to understand and compile the terminologies and definitions already being used by the projects, the Steering Group conducted a survey among all CRC projects in December 2022 (see Box 1). Based on the survey results, the Steering Group developed an initial proposal for common terms and concepts in January 2023, which was presented to the entire organisation on February 8th and 9th, 2023. At this Retreat, two sessions were allocated for discussing the proposal: "Session I: On Generosity, Inclusiveness, and Scope of Benefits" and "Session II: Types of Benefits". These sessions included presentations, and active participation and feedback from all 15 projects.

Box 1. Questionnaire on concepts and terminologies of projects

- 1) What are the terms your project uses to refer to the two basic dimensions of the proposal: "Leistungsumfang" and "Inklusivität"? Do you use any overarching term to cover both aspects? Please, provide the terms you use (German and English).
- 2) How does your project conceptualise/operationalise "Leistungsumfang" and "Inklusivität"?
- 3) How does your project conceptually address entitlement and eligibility rules/conditionalities?
- 4) Which benefits does your project collect data on? Please, indicate to which of the three basic types (i.e. cash, in-kind, regulatory) the respective benefits belong (e.g. residential care → in-kind). How do you define cash, in-kind and regulatory benefits in your project?
- 5) How does your project conceptualise/operationalise the analysed "(social) groups" with respect to potential "Inklusion"?
- 6) Besides the concepts referred to above, are there other terms and/or concepts you believe the CRC should harmonise?

Source: Questionnaire on concepts and terminologies of projects, CRC 1342 Steering Group.

Results of this survey were gathered and incorporated into the development of the Glossary by its authors at the Retreat in February 2023. Their final decisions were then validated by the Steering Group in June 2023 and by the CRC 1342 Board of Members in December 2023.

¹ Members of the Steering Group were (in alphabetic order): Gabriela de Carvalho (A04), Heiner Fechner (A03), Heinz Rothgang (A04/A07), Johanna Fischer (A07), Nils Düpont (INF), and Tobias Böger (A06).

1. INTRODUCTION

Who receives under which conditions what and how much are crucial subjects of social policy analysis (Øverbye, 2021, pp. 229–231). Questions relating to the subject can, for instance, revolve around the following: Which occupational and societal groups have historically been entitled to social benefits and how many persons have actually received them? To what extent far are economic conditions considered when granting a benefit? Are benefits transferred in the form of cash, goods, services or (other) rights? What share of previous earnings is received in the event of unemployment or old-age? Which share of healthcare, long-term care or education costs need to be co-paid by individuals and/or households? Which duration of care-related or annual leave from employment is guaranteed?

However, across different literature strands and policy fields, there exist different concepts and terminologies when talking about the ‘who’, the ‘conditions’, the ‘what’ and the ‘how much’. Let us provide some examples, first as regards *terminology*. The term “generosity” has been used to refer, in an overarching fashion, to the total amount and distribution of social benefits (e.g. Eggers, Grages, Pfau-Effinger, & Och, 2020; Otto, Bártová, & van Lancker, 2021; Scruggs & Ramalho Tafoya, 2022) but also to refer to the material dimension of the level of benefits only (Kuitto, Madia, & Podestà, 2023; Ranci, Österle, Arlotti, & Parma, 2019; e.g. Toth, 2019). Other terms which have been used for describing the overarching ‘welfare stateness’ are “social rights” (Blank, 2010, p. 55; Dobrotić & Blum, 2019), “entitlements” (Leisering, 2019, p. 61), or “coverage” (Toth, 2019), some of which are in other frameworks also employed to denote specific aspects of the concept only. Turning to the *conceptualisation* of “who receives under which conditions what and how much”, we can find varying frameworks as well. In particular, the content and amount of (sub)dimensions for describing the subject differ. For instance, there are descriptions implying two dimensions, that is, personal plus material characteristics (Böhm, 2016; Eggers et al., 2020; Ranci et al., 2019). Furthermore, there are three-dimensional accounts placing, on the one hand, more emphasis on the personal dimension, differentiating entitlement, eligibility/conditionality, and benefit scope (Blank, 2010; Dobrotić & Blum, 2019) and on the other hand, concepts with a single personal dimension (“who”) which differentiate the types and level (cost) of benefits instead (Toth, 2019; World Health Organization [WHO], 2010).

It is against this backdrop that this Glossary aims to outline terms and definitions which can be employed to denote macro-level concepts in a common language and understanding. Based on a collaborative and iterative process within the CRC 1342 (see Foreword for details), we propose the following framework to sort the questions of who receives under which conditions what and how much. In this framework, *generosity* functions as an overarching concept with two dimensions; the personal dimension is labelled *inclusiveness*, the material dimension *scope of benefits*. The first section of the Glossary further specifies this understanding and presents the definitions of these central concepts. The second section of the Glossary defines *social benefits*, distinguishing three main types of benefits: *cash benefits*, *in-kind benefits*, and *regulatory benefits*. While terminological and conceptual unclarities are not such a big issue here, clear demarcation and definition of social benefit types – in particular of what we call regulatory benefits – are also seldom discussed (but see Kaufmann, 2012). As the understanding and, especially, the measurement of generosity depends crucially on the type of benefit at hand – for instance, income replacement rates are naturally linked to cash transfers and co-payments to service provision – guiding definitions for benefit types are presented in this Glossary as well. It is important to note that the framework has a guiding function which can then be concretised and operationalised according to particular applications, such as policy field, regional scope, and/or research focus.

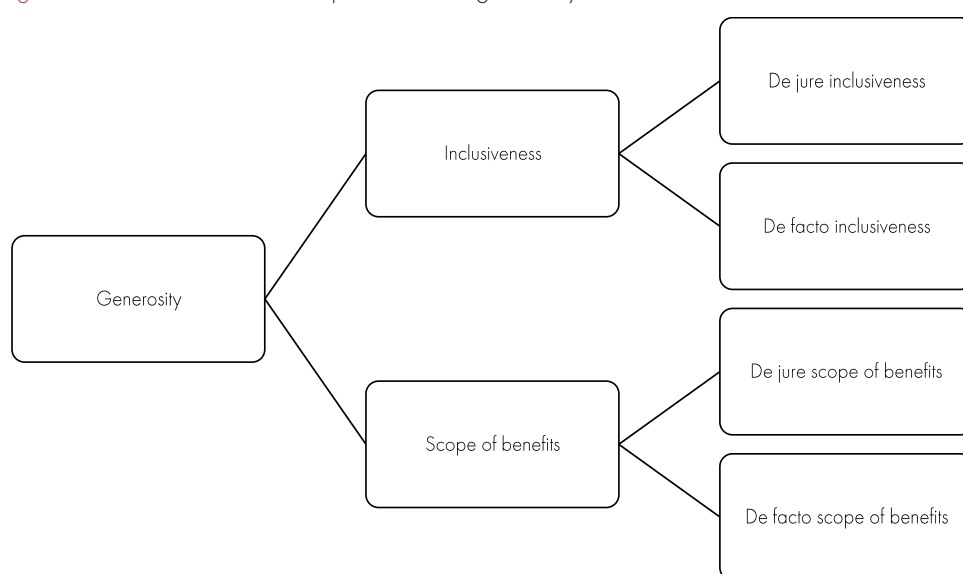
In the following two sections, we provide each a brief introductory paragraph and graph on the interrelation of the concepts, followed by the key terms in English and German, their proposed defini-

tions, and sources which have contributed to the definitions.² Additionally, to the specified published sources, the definitions have been informed by the survey and various discussions within the CRC 1342 (see Foreword for details).

2. GENEROSITY: TERMS AND DEFINITIONS

Generosity functions as an overarching concept with two dimensions; the personal dimension is labelled *inclusiveness*; and the material dimension is labelled *scope of benefits*. Both dimensions can be understood in terms of formal legal regulation, that is in terms of *de jure inclusiveness/de jure scope of benefits* and/or their actual provision, that is *de facto inclusiveness/de facto scope of benefits*. Figure 2 depicts the interrelation and hierarchy of the concepts in the presented framework.

Figure 2. Two-dimensional conceptualisation of generosity.



Source: Own presentation.

2.1 Generosity [Generosität]

Generosity is comprised of two dimensions: inclusiveness as the personal dimension and scope of benefits as the material dimension. The personal dimension identifies who is entitled or actually receives benefits. The material dimension delineates what and how much are at stake. Essentially, generosity measures the amount and distribution of social benefits at the national or population level.

Informing sources

Blank, F. (2010). *Soziale Rechte 1998-2005: Die Wohlfahrtsstaatsreformen der rot-grünen Bundesregierung. Sozialpolitik und Sozialstaat*. Wiesbaden: VS Verlag für Sozialwissenschaften. <https://doi.org/10.1007/978-3-531-92747-3> (p. 50-57)

Dobrotić, I., & Blum, S. (2019). A social right? Access to leave and its relation to parents' labour market position. In P. Moss, A.-Z. Duvander, & A. Kosłowski (Eds.), *Parental leave and beyond: Recent international developments, current issues and future directions* (pp. 261–280). Bristol: Policy Press.

² References cited as "informing sources" do not necessarily contain similar terms/definitions but have been useful in thinking about and developing the respective concepts.

- Eggers, T., Grages, C., Pfau-Effinger, B., & Och, R. (2020). Re-conceptualising the relationship between de-familialisation and familialisation and the implications for gender equality – the case of long-term care policies for older people. *Ageing and Society*, 40(4), 869–895. <https://doi.org/10.1017/S0144686X18001435>
- Esping-Andersen, G. (1990). *The three worlds of welfare capitalism*. Cambridge: Polity Press. (p. 49)
- Ranci, C., Österle, A., Arlotti, M., & Parma, A. (2019). Coverage versus generosity: Comparing eligibility and need assessment in six cash-for-care programmes. *Social Policy & Administration*, 53(4), 551–566.
- Scruggs, L. A., & Ramalho Tafoya, G. (2022). Fifty years of welfare state generosity. *Social Policy & Administration*. Advance online publication. <https://doi.org/10.1111/spol.12804> (p. 793-794)
- World Health Organization (2010). *Health systems financing: The path to universal coverage*. *The World Health Report*. Geneva. Retrieved from https://apps.who.int/iris/bitstream/handle/10665/44371/9789241564021_eng.pdf?sequence=1&isAllowed=y (p. 12)

2.2 De jure vs. de facto

DE JURE

De jure (English “in law”) refers to the formal legal regulation of social policy.

DE FACTO

De facto (English “in fact”) refers to the actual provision of social policy.

Informing sources

- Calhoun, C. (Ed.) (2002). *Oxford reference online premium. Dictionary of the social sciences*. Oxford: Oxford University Press.
- Law, J. (Ed.) (2022). *Oxford reference online premium. A dictionary of law* (Tenth edition). Oxford: Oxford University Press.

2.3 Inclusiveness [Inklusivität]

Inclusiveness is the personal dimension of generosity. De jure inclusiveness identifies which societal groups and/or how many individuals are entitled to social benefits and the necessary conditions that need to be met in order to receive them, as defined by law. De facto inclusiveness identifies which societal groups and/or how many individuals actually receive social benefits and the necessary conditions that need to be met in order to receive them, as defined by practice.

Informing sources

- Blank, F. (2010). *Soziale Rechte 1998-2005: Die Wohlfahrtsstaatsreformen der rot-grünen Bundesregierung*. *Sozialpolitik und Sozialstaat*. Wiesbaden: VS Verlag für Sozialwissenschaften. <https://doi.org/10.1007/978-3-531-92747-3> (p. 50-57)
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- Clasen, J., & Clegg, D. (2007). Levels and levers of conditionality. Measuring change within welfare states. In J. Clasen & N. A. Siegel (Eds.), *Investigating welfare state change: The ‘dependent variable problem’ in comparative analysis*. Cheltenham, UK, Northampton, MA: Edward Elgar Publishing.
- Dobrotić, I., & Blum, S. (2019). A social right? Access to leave and its relation to parents’ labour market position. In P. Moss, A.-Z. Duvander, & A. Kosłowski (Eds.), *Parental leave and beyond: Recent international developments, current issues and future directions* (pp. 261–280). Bristol: Policy Press.
- Esping-Andersen, G. (1990). *The three worlds of welfare capitalism*. Cambridge: Polity Press. (p. 47)
- Kildal, N., & Kuhnle, S. (2005). The Nordic welfare model and the idea of universalism. In N. Kildal & S. Kuhnle (Eds.), *Routledge/EUI studies in the political economy of welfare: Vol. 7. Normative foundations of the welfare state: The Nordic experience* (pp. 13–33). London: Routledge. (p. 15)

2.4 Scope of benefits [Leistungsumfang]

Scope of benefits is the material dimension of generosity. De jure scope of benefit identifies the specific benefits (content and level of benefits) available to societal groups/persons under conditions set by law. De facto scope of benefit identifies the specific social benefits (content and level of benefits) actually available or used by societal groups/persons.

Informing sources

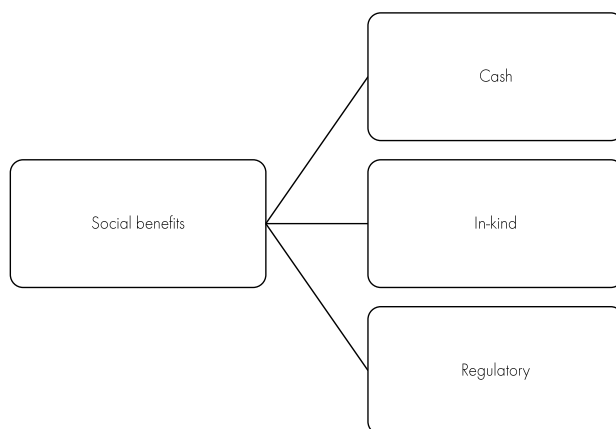
Scruggs, L. A., & Ramalho Tafoya, G. (2022). Fifty years of welfare state generosity. *Social Policy & Administration*. Advance online publication. <https://doi.org/10.1111/spol.12804> (p. 793-794)

Esping-Andersen, G. (1990). *The three worlds of welfare capitalism*. Cambridge: Polity Press. (p. 47)

3. SOCIAL BENEFITS: TERMS AND DEFINITIONS

Social benefits refer to interventions or measures designed to (1) protect individuals and households against misfortunes that may threaten their livelihoods, such as work accidents, through work injury compensation, and (2) address social needs, like healthcare, through the provision of medical services (Harsløf and Ulmestig, 2013; Kaufmann, 2012). Social benefits can manifest in three forms/types: the transfer of monetary resources (cash), provision of services or goods (in-kind), and the establishment of rights and obligations (regulatory). Figure 3 depicts this framework, and the boundaries of each form/type are presented below.

Figure 3. Types of social benefits



Source: Own presentation.

3.1 Social Benefits [Sozialleistungen]

Social benefits are cash, in-kind, and regulatory interventions provided, financed, and/or regulated by the state addressing social risks or needs.

Informing sources

Collaborative Research Centre 1342, CRC 1342. (2021). *Globale Entwicklungsdynamiken von Sozialpolitik*. Finanzierungsantrag 2022 – 2025. Universität Bremen.

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- Write, J. (2015). Social benefits. In *International Encyclopedia of the Social & Behavioral Sciences*. Elsevier.

3.2 Cash Benefits [Geldleistungen]

Cash benefits refer to direct or indirect monetary transfers to beneficiaries addressing social risks or needs.

Informing sources

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3.3 In-kind Benefits [Sachleistungen]

In-kind benefits refer to the provision of goods and/or services to beneficiaries addressing social risk or needs.

Informing sources

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- Paulus, A., Sutherland, H., & Tsakoglou, P. (2010). The Distributional Impact of In-Kind Public Benefits in European Countries. *Journal of Policy Analysis and Management*, 29(2), 243–266.

3.4 Regulatory Benefits [Regulationsleistungen]

Regulatory benefits refer to legal interventions to influence behaviour. They establish rights and duties of individuals and corporate actors that address social risks or needs. In the case that a regulatory benefit also includes the provision of monetary resources, goods, or services, this benefit is subsumed under cash or in-kind benefits.

Informing sources

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