

UDC 32: 304.42

BBK 66.011.3

Olena Berezovska-Chmil

**COMPERATIVE-TYOLOGICAL CHARACTERISTICS
OF SOCIAL POLICY MODELS**

Analyzes developed approach to the typology of the social models. We study the differences between the basic models to find long-term benchmark for developing the national model of social policy.

Keywords: *social policy, social model, the general welfare, social care, social security.*

Updating study of social policy models, characteristics of its formation and implementation into world political practice can be observed in modern political science researches. It is determined by strengthening of crisis economic trends, low efficiency of institutional formations and intensification of formation processes and development of informal structures in the social sphere.

The most fundamental research in this area was made by Wilensky H., Lebeaux C., Esping-Andersen G., Mishra R., Lorenz W., Tilton T., Fernis N., Baker W., Titmuss R., Ginsburg N. and others.

Undoubtedly in modern context can be observed such immediate problem as analyses of forming Ukrainian social policy model as well as features of optimization and adaptation of the regulatory framework to the European standards. A significant contribution to the development of the given problem was made by such local researchers as Sobchenko V., Silenko A., Skrypniuk O., Kutsenko V., Skurativs'kyi V., Chetvertikova L., Spivak V., Pankevych O., Naumkina S., Khoma N., Hayevs'kyi B., Gansova E., Honcharova S., Ivanova O., Stepanenko V., Yakovyuk I., Kozachenko I., Nikolayevskyi V., Novikova O. and so on.

The aim of this study is a comparative analysis of social policy models in political science discourse.

Any social policy model is methodologically based on ideological backbone including the approach for solving major social problems and avoiding risks.

The famous Swedish researcher G.Esping-Andersen has developed social policy typology based on the type "ideology" of the state form of government, which comprises of three types, or "modes" of the so-called "priveleged capitalism." The thesis stating that social policy strategies in different countries are divided according certain internally integrated features became the basis for this classification. That's why the social strategies of different types describe specific sequence of circumstances and actions in reliance on the nature of state intervention, stratification of social groups and the line, where market is changed through bureaucratic division in the process of "bureaucracy".

Classification of social policy by Esping-Andersen includes the following three types: liberal, social democratic and conservative (corporate).

Liberal type (peculiar to English-speaking countries and Japan) is characterized by the state tendency for separation of the social care from the open market. The aim is poverty reduction. Liberal type is described by comparably low level of "bureaucracy", sufficiently high level of stratification in terms of income gap and state intervention that is characterized more by market regulation than providing and financing social benefits. Liberal type has only two sources of social welfare: market and family. The state is only intended to supplement these channels, its intervention must be temporary and insignificant.

Social democratic type (Scandinavian countries). It is characterized by one-size-fits-all solution approach for social care by providing standard sets of monetary and in-kind aid or defined set of services. The aim is redistribution of profits.

Social democratic type has high level of "bureaucracy" and low level of stratification conversely. At that, regulation and financing of social benefits is achieved through the direct state interference. Scandinavian model by Esping-Andersen is also called "institutional". One of its important features is the principle of universalism. Universalism according to scandinavian model means that the social safety net is equally applied to all residents: rich and poor, indigenous population and migrants. Another feature is rampant development of the public sector of economy, especially in the social sphere: social security for all intents and purposes is in holdfast of the state and municipalities. It involves socialized health care, public free higher and secondary education, public pensions, public libraries, radio and television. The third feature is the so-called three-party agreement among employers, wage workers and the state, which provides a kind of compromise between capital and labor. Workers as well as employers are organized into potent and high-powered corporative communities, which conduct negotiations with the participation of state bodies.

Conservative or conservative corporate type (mainly Western European countries). It is characterized by the appliance of classical bismarck system of social security, pursuance of compensatory aid for past achievements. The aim is preservation of living standart reached in active working age. It combines the features of the first two types: strongly pronounced stratification on income level (especially in France) as well as on social status, with quite a significant degree of "bureaucracy." State intervention is primarily a strict regulation of loss-making enterprises, but not a direct social security. The state provides social support only in fields, where development is concerned, and the assistance level depends on the place of individuum in a hierarchical structure of society.

Analyzing the concept by Esping-Andersen G., Ginsburg N. adds another one – liberal collectivist (British) of welfare that combines the features of the socialist and liberal [6].

Typology by foreign authors Wilensky H. and Lebeaux C is worth of mentioning. According to it two models of social policy can be distinguished [10].

The first one can be called residual. In this case, social policy performs functions which are unable for a market. It is limited in scope and coverage of social policy, mainly passive and is compensatory. Its conceptual framework is developed being affected by the ideas of conservatism. A typical sample of this variant (with a certain degree of conditionality) is an American model. The second group is institutional. Here social policy is crucial for providing social services and is thought of as more effective in socio-economic and political sense means than a system of private institutions. According to the conceptual point of view, foremost this group is affected by social democratic ideology. One of its typical samples is the Swedish version of the welfare state.

Both models are distinguished not by presence or absence of certain components, but by its ratio and the degree of state intervention into the social sector, the role of redistributive processes, the degree of social problems priority in government actions. The social role of the state in all countries of the world is in the range between these two groups.

British scientist Mishra R. completed the mentioned above models with one more - socialist, which is characterized by centralized government control of all public life aspects, high employment, functioning of the universal free social programs [7, p. 101].

Besides, close to the noted-above is distinguishing four basic models of social policy: conservative, liberal, social-democratic and Catholic. Conservative model stresses the importance of the market and compulsory social insurance under state supervision. According to its fundamentals, labor determines the subsequent social care. The liberal model also points up the market, but it involves social policy of residual type. Therefore, in accordance with it,

the central government has – albeit limited – liability for the social protection of every citizen. The basic principle of the social-democratic model is a "universalism". So it implies that social security is a right of every citizen, which is provided mainly by means of the state budget. The central element of the Catholic model is a public assistance, where the major role is performed by the family and the local community, including neighbors, church and community organizations.

Kozachenko I. and Nicholaevskiy V. classificate neo-liberal, social catholic and social democratic models of social policy [2, p. 19].

Whereas, western authors and Tilton T. and Fernis N. have distinguished three models: of "social welfare", "social security" and "social care". According to the first one, social policy aimed at ensuring equal status for every citizen, social services networking, leveling income gap and so on. The second model involves poverty elimination via social insurance, arrangement of conditions for full employment of the population. The third model is focused on providing "equal opportunities" and liberal principles of governance. Social policy here is only a tool of solving social conflicts, expenditure is formed residually [8].

Another approach to social policy typology was identified in the work "Social Work in a Changing Europe" by Lorenz W. In fact, having completed the concept by Esping-Andersen G., he singled out Scandinavian, residual, corporatist and rudimentary model [3, p. 31-37]. Feature of the additional rudimentary model resides in the fact that social functions are usually performed by NGOs (non-governmental organisations).

In addition, to these features there is also a social policy typology based on other grounds, such as basic actions (social care, social guardianship, social insurance, social development), type of the subject of the social responsibility (paternalistic, aligned, corporate, liberal model), type of relations "state - market" (administrative, voluntary, stimulating model) [9, p. 5-6].

More radical viewpoint states that there are mainly two models of social protection: social democratic and liberal orientation. However, they can not exist in their pure form, as every real-life model of social policy is mixed.

A variety of institutions, forms and mechanisms, which shape national frame of a society, specifics of their organization and functioning, allows not only to distinguish additional models, such as Latin (Catholic), rudimentary (transitional), paternalistic and many others, but, in a determinate sense, conceives that there are as many social policy models of the population, as countries in the world. In compliance of the requirements and interests of the society, each state forms its own national framework of welfare, conditioned upon the socio-economic cause system, geographic features, cultural and historical traditions, form of government, gradations of civil society, as well as model of the welfare state and type of its social policy.

It should be also noted that the formation of social policy models in our country has its own specificity. In our opinion, Ukraine is in need of adjustment of the social safety net and the formation of its own social policy model, taking into account both international experience and national features.

Ukrainian researcher Sobchenko V. characterizes national model as follows:

- according to the type of basic action: social accessory and social guardianship with elements of social security;
- according to the type of the subject of social responsibility: paternalistic model with elements of aligned one;
- according to the type of relationship «state-market»: the administrative model with elements of voluntary one.

In the meantime, she justly considers that, taking into account modern trends, it makes more sense for Ukraine to offer the following model of social policy as promising one:

– according to the type of basic action: social development with elements of social security;
– according to the type of the subject of social responsibility: liberal model with elements of corporate and aligned one;
– according to the type of relationship «state-market»: stimulating model with elements of voluntary one [4, p.17-18].

Therefore, summarizing the various scientific approaches to the study of social policy models, we can identify the following key criteria of typology: liable party (liberal, corporatist, social-democratic), the degree of state involvement (voluntary, administrative, stimulating), the type of basic action (social assistance, social care, social security, social development).

Consequently, most typology approaches complete its classical models and form the so-called "hybrid" types. To sum up, we also note – while developing the model of social policy, such traditional ideological concepts as liberalism, conservatism and socialism should be taken into account. From there, we can classify the efforts of different sectors of social life, specified by the specifics of a certain stage of adaptative process.

For strata and groups, which finish the adaptation process, the most significant problem is the most comprehensive implementation of their own capabilities and interests, its social activity. In this sector of social life liberalism is reproduced – concept of minimizing state intervention, providing all social strata with nominally equal starting conditions. Keynote of aspirations in this sector is the purcuance of self-reliance, also creating conditions for self-activity and life self-organization in various fields, especially in social one. This sector provokes autogenesis and development of brand new subjects of social life, which put forward new demands for conditions of its implementation. Therefore, adapted sector at the same time transforms into space, where the new norms, patterns and stereotypes are formed. It is conveyed into society and becomes a model, leader, providing socio-economic development with the dynamism.

Considering requirements of positive adaptation, we also need to build conceptual benchmarks of social policy regarding outsiders – strata and groups, which, for various reasons, are not able to be adapted to the new requirements propogated by the social reality in its dynamic development. The key point for this sector is creation of special social and economic mechanisms that gives outsiders the opportunity to join in social life processes that will ensure the realization of their needs and interests. These groups are characterized by the presence of objective difficulties when faced with a new reality, as well as self-depreciation that deteriorates possibilities of mobilizing spiritual and conative resources for inclusion into the relevant structures of social activity.

A promising direction of further scientific development in social research is to analyze the characteristics of the formation and improvement of Ukrainian model of social policy in terms of European integration.

1. Kalov Z. Special aspects of realization of the social policy models / Kalov Z., Kurshaeva F., Khatsieva L // Modern problems of science and education. - 2009. - № 2. - p. 106-108.

2. Kozachenko I., Nikolaevs'kyi V. Special aspects of evolution of social welfare states and their relevancy to Ukrainian reality / Kozachenko I., Nikolaevs'kyi V. // Herald by V. Karazin Kharkiv National University . — 2010. — No 891.— p.19.

3. Lorenz W. Social Work in a Changing Europe. / Lorenz W. – K.: Ukrainian Psychiatric Association. - 1997. – 199 p.

4. Sobchenko V. Transformation of the public administration system through social protection of the population: extended abstract of Cand. Sci. (Pub. Admin.) Dissertation.: spec. 25.00.01 / Sobchenko V. / National academy for public administration under the President of Ukraine. – Kharkiv. - 2005. – 19 p.

5. Esping-Andersen G. The Three Worlds of Welfare Capitalism/ G. Esping-Andersen. –

Cambridge, UK: Polity Press. - 1990. – 266 p.

6. Ginsburg N. Divisionsof Welfare. A Critical Introduction to Comparative Welfare Policy / Ginsburg N. – London. - 1993. – 110 p.

7. Mishra R. Society and Social Policy: Theories and practice of welfare / R.Mishra. – Atlantic Highlands: Humanities Press. - 1981. – 221 p.

8. Normann F., Timothu T. The case for the welfare state. From social securitu to social equality./ F.Normann, T.Timothu. – Bloomington/London. – 1977.– p.3–21.

9. Swedberg R. On the Present State of Economic Sociology (1990s) / R.Swedberg // Economic Sociology – European Electronic Newsletter. 2004. – Vol. 5. – №. 2. – P. 2-17

10. Wilensky H. L, Lebeaux C. N. Industrial society and social welfare / Wilensky H. L, Lebeaux C. N. – NY. – 1958. – 220 p.

В сучасних політологічних дослідженнях спостерігається актуалізація вивчення моделей соціальної політики, особливостей їх формування та реалізації в світовій політичній практиці. Це зумовлено посиленням кризових економічних тенденцій, низькою ефективністю інституційних утворень та інтенсифікацією процесів формування та розвитку неформальних структур у соціальній сфері.

В статті проаналізовано теоретичні підходи до дослідження моделей соціальної політики таких вчених, як Г.Еспінг-Андерсен (ліберальна, соціал-демократична і консервативна моделі), Г.Віленський і Ч.Лебо (залишкова та інституціональна), Н.Гінсбург (ліберальна, соціал-демократична, ліберально-колективістська моделі), Р.Мішра (соціалістична, залишкова, інституціональна моделі), І. Козаченко та В. Ніколаєвський (неоліберальна, соціально-католицьку та соціально-демократичну моделі), Т.Тілтон і Н.Ферніс (моделі «соціального добробуту», «соціальної безпеки» і «соціального захисту»), У. Лоренц (скандинавська, залишкова, корпоративістська та рудиментарна моделі), Р.Сведберг (патерналістська, солідарна, корпоративна, ліберальна моделі).

На основі аналізу класичних та сучасних теорій, узагальнено та виокремлено такі критерії типологізації моделей соціальної політики: суб'єкт відповідальності, ступінь участі держави, тип базової дії.

Визначено особливості національної моделі соціальної політики та наведено типологію В.Собченко, згідно якої в Україні сформувалась патерналістська модель з елементами солідарної (за типом суб'єкта соціальної відповідальності), адміністративна модель з елементами добродійної (за типом відношення держава-ринок), соціальна допоміжність і соціальне опікування з елементами соціального страхування (за типом базової дії). Підтримано та аргументовано твердження щодо вдосконалення української соціальної моделі та зміни її відповідно за типом суб'єкта відповідальності до ліберальної з елементами корпоративної та солідарної, за типом базової дії до соціального розвитку з елементами соціального страхування, за типом відносин держава-ринок до стимулюючої з елементами добродійної.

Перспективним напрямом подальших наукових розробок в дослідженні соціальної сфери визначено аналіз особливостей формування та вдосконалення української моделі соціальної політики в контексті європейської інтеграції.

Ключові слова: соціальна політика, соціальна модель, загальний добробут, соціальне піклування, соціальна безпека.

В статье проанализированы классические и новейшие теоретические подходы к исследованию моделей социальной политики, обобщены основные критерии их типологизации, определены особенности формирования национальной социальной модели.

Ключевые слова: социальная политика, социальная модель, общее благосостояние, социальное призрение, социальная безопасность.