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## **1. Introduction**

Religion is a central aspect of human life. Even in relatively highly secularised societies it remains a significant issue in social policy debates dealing with issues ranging from education and family policy to health care and support for the poor (Jawad, 2012). Much has been written about the religion-social policy nexus but the literature remains overly fragmented. Focusing primarily on North America and Western Europe, this essay seeks to create a fruitful dialogue among the three main streams of research in the area that focus on political parties, faith-based organizations, and individual behaviour. This essay aims to formulate a new, integrated agenda for future research on the religion and social policy nexus that also extends beyond Western societies.

Bearing in mind that the sociology of religion literature recognises the transnational character of religious identity, for example that the new epicentres of Christianity are now in Africa and Latin America (thanks to the growth of the Pentecostalism) or that Islam is the second largest religion in most European countries, the rationale for focusing on ‘the West’ remains important. Writing in the North American context, Gorski (2005) has argued that whereas sociologists and political scientists have more readily recognised that religion is a socio-political force in the context of developing countries, and often explains their lack of modernisation, they have not turned these debates to the Western context. Other scholars writing in the European context such as Grace Davie (1994, 2001) and Paul Heelas and Linda Woodhead (2004) have sustained the argument that religious identity is still vibrant across European societies though it takes the ‘vicarious’ form of ‘everyday religion’. Thus, Christian populations in particular have not completely abandoned religious affiliation but have developed a more individualised and less institutionalised form of religiosity. Hjelm (2015) reviews these arguments in the context of political change within Europe and the challenge of developing dialogue between secular institutions of governance and the presence of new religious groups primarily of immigrant origin

in Europe. With this in mind, this essay will review and assess of scholarship on the role of religion in social policy.

## **2. Analysing the Religion and Social Policy Nexus**

The religion and social policy nexus is a complex one and a crossroads where many different research streams intersect. The nexus has been studied in reference to Western European and liberal welfare states outside of Europe (e.g., North America) through three types of interconnected levels:

- a. The **political party level**: one large part of the literature has concentrated on political parties with explicit religious inspirations and their role in fostering welfare reforms. This type of literature stems from the literature on political cleavages and historical institutionalism and has tried to explain a series of phenomena:
  - What type of relationship exists between religion, modernization and the rise of the welfare state;
  - Why political parties with an explicit religious inspiration came to prominence in certain democratic countries, while they did not play a significant political role in others;
  - Why political parties with an explicit religious inspiration were able to participate in coalitions with other parties to foster welfare state reforms in certain democratic countries, while such coalitions failed in others;
  - How different ideological positions on the welfare state political parties with an explicit religious inspiration have had depending on their specific (Christian) denomination.
- b. The **faith-based organization level**: historically, faith-based or religiously-affiliated organizations have run welfare programs (from social assistance to education, from health

care to family support) in many countries. Their role was important before the onset of the welfare state and, in many cases, has remained significant afterwards. The literature on the role of these types of organizations in the welfare state has partially overlapped with the literature on non-profit organizations and (organized) voluntary action. This type of literature has tried to study the relationship between religion and welfare by looking at a series of phenomena:

- How much welfare provision is also a source of power and social legitimation for the organizations themselves and the Churches they represent;
- What type of provision is channelled through faith-based/religious organizations and how relevant it is in the overall welfare state delivery system;
- How much non-profit organizations in general and specifically Church-related ones foster *social innovation* in the way ‘new’ social risks are addressed or ‘old’ ones are tackled in original ways.

c. The **individual level**: individuals often tend to act according to their values. A third stream of literature on the relationship between religion and the welfare state has focused its attention on the nexus between individual values and orientation, in particular the values related to individual faith (and Church attendance), and views about what role the social policy system should play in society (e.g., what services should be delivered, what type of solidarity and inclusion should be fostered, who ‘deserves’ welfare provision, etc.). This literature has expanded especially when studying countries where different religions are present or where there is a mix between individuals with religious beliefs and people without them. The literature has looked at:

- How the ‘indirect link’ between religion and social policy issues works at the individual level. In other words, how strong is the association between individual religious beliefs and behaviours in the realm of politics (what parties with different stances on welfare issues are supported by people with different or no religious faiths)? Does the scale of this association vary depending on religious denomination?
- How the ‘direct link’ between religion and welfare issues works at the individual level. Do religious individuals have different welfare-related ideas, values, and preferences than non-religious individuals? Do welfare-related values and preferences vary according to religious denomination?

Within approaches looking at the relationship between the welfare state and individual behaviours and values, there is also another stream of research that connects welfare state provision, spirituality and wellbeing. In particular, this literature analyses:

- how individual’s moral and religious values and ethnic identity shape attitudes, self-perceptions and coping strategies when individuals face welfare issues and social risks.

Trying to provide a critical overview of the empirical results and the different theoretical orientations present in the literature dealing with the religion and social policy nexus is a challenging task, especially given the vast amount of literature that has focused on all these issues in recent decades. We do not try to cover all the literature in the present essay but, instead, look at what can be considered the main results stemming from each debate at the macro, meso and micro levels.

### **3. A Note on Church-State Models**

Before we discuss these three streams of literature in greater detail, it is appropriate to offer broad remarks about how scholars have mapped Church-State interactions. Various patterns of relationships between religion and the welfare state in Western democracies have been mapped out onto three types of Church-State relations that began to shape welfare policies from the 19th century onwards. For Morgan (2009, 57), who does not include Britain in her typology, these patterns of Church-State relations are as follows:

1. The Nordic European model, characterised by religious homogeneity, Church-State fusion and no significant socio-political conflict based on religion, where liberal forces were in close alliance with the social Protestant.
2. The Catholic European model, where strong Church-State conflict dominated the political and electoral scene and liberal forces became closely associated with the anti-clerical movement (e.g. Belgium, France and Italy).
3. Countries where religious forces gained political prominence and their policies and interests were accommodated in society (e.g. Germany, Austria and the Netherlands).

Morgan's (2009) typology focuses on political party cleavages, especially between left-wing and religious/Catholic parties. This typology can be superimposed onto the more standard Church-State classification offered by Casanova (1994; 2008) which describes the liberal nature of religious practice as follows:

1. Formal Church establishment with relative 'free exercise' of religion in society (England, Scotland and the Nordic countries)
2. Formal disestablishment of the Church and strict regulation of religious practice (France and the former Communist countries)

3. A half-way house between formal separation of Church and State, but with the existence of informal single or multi-Church establishments (Germany and the Southern European countries)
4. Disestablishment with a very high degree of religious pluralism (US)

Based on the patterns of Church-State separation mentioned above, this section examines the academic literature on the role of religion in social policy in the advanced capitalist Western world through a cultural-geographical lens (Heidenheimer, 1983). Thus, the four main groupings proposed in this essay are:

1. The Catholic countries of Southern Europe, such as Spain, Italy, Greece, Cyprus (the latter two being Orthodox countries), and to some extent France, where moderate to high levels of religiosity prevail (with the exception of France) and low levels of religious pluralism exist (on France see Portier, 2016).
2. The Protestant Nordic European countries, mostly with a Lutheran tradition, with low levels of religiosity and high levels of welfare state provision.
3. The Continental European countries (excluding France), where there is a mix of different Christian faiths, a moderate level of religiosity, and a relatively strong welfare state.
4. The English speaking world, which includes the US, Britain, Canada, Australia and New Zealand, all of which experienced a late onset of the welfare state (Heidenheimer, 1983), even though implementation was quick and comprehensive when it was finally introduced, as in Britain in 1906 and then 1945. Strong liberal political traditions now operate in a context of religious pluralism in these countries.

The dividing line between Catholic and Protestant countries is important since research has shown that the welfare state developed along different lines depending on the relative importance

of Catholic social teachings or Social Protestantism (Casanova, 2008; Kahl, 2005; van Kersbergen and Manow, 2010). Indeed, as Gorski (2005:163) further notes, ‘corporate-conservative welfare states were most likely to emerge in predominantly Catholic societies, such as France and Italy, Liberal welfare states emerged only in areas heavily influenced by Reformed Protestantism (that is England and its settler colonies). Social democratic welfare states emerged only in the homogenously Lutheran countries of Scandinavia’.

Like Van Kersbergen and Manow (2010), Gorski (2005) emphasises the links between values and institutional formations in the welfare regimes of Western Europe making the study of religion ever more pertinent. Historians of the welfare state increasingly emphasise that, in many respects, the welfare state is not the culmination of activities and aspirations of either labour movements or social democratic parties (Van Kersbergen and Manow, 2010; Offer, 2007). Nor is welfare state development necessarily delayed by religion. Rather, religious political mobilisation, particularly of Catholic political parties, as in Italy and Germany, played a fundamental role in pioneering social legislation in the formative periods of the welfare state from the 19th century to the Second World War. What follows in section 4 is a brief consideration of the three main pathways that European welfare states have followed, based on the classification above, and also taking into consideration other institutional variables.

#### **4. Political Parties, Religion and the Welfare State**

The comparative and historical scholarship on welfare state development has generally recognized the role of religion in the emergence of modern social policy. In this regard, two distinct streams of research have been developed over time. On one hand, the power resource and the welfare regime approaches frame the labour/capital cleavage as central in explaining modern social



protection systems, leaving a secondary role to religion and to religiously-inspired political parties (Baldwin, 1990; Esping-Andersen, 1990; Korpi, 1978 Stephens, 1979). More specifically, it was mainly Catholicism, and not Protestantism, that played an important role in welfare state development, and only in those countries where Christian parties were able to aggregate Catholic workers and form coalitions with other political actors (together or against left-wing workers' movements), as in Germany. In this literature, the history of the welfare state in Europe begins after the Second World War and scholars no longer look to earlier historical periods.

On the other hand, a second approach, inspired by the work of Stein Rokkan, has recognized a more substantial explanatory role for religion in welfare state development. This approach includes two different waves of scholarship. The first one was part of the well-established welfare state research of the 1970s and 1980s and focused on the key role of religion in explaining the development of modern social protection in Western countries (Flora, 1983; Heidenheimer, 1983. See also Flora & Heidenheimer, 1981; Flora et al., 1999). In this view, the increasing demands for social and economic equality during the modernization process led to questions about the role of the State and its functions. Modernization has been seen in most of the welfare state development literature as a State response to the negative social consequences of industrialization. In this literature, religion played an important role in modern welfare state development, as a long-term structural force associated with the rise of Protestantism and, later, secularization.

Much more recently, a second wave of research has emerged along similar lines (Van Kersbergen & Manow, 2009). In this new literature, however, the focus is on the conflicts between Church and State on who should have the leading responsibility for both education and the protection of workers and their families. In this second wave of scholarship, the story of modern welfare state development has seen not one but at least two important cleavages, with the former

typically preceding the latter, historically speaking: the liberal-anticlerical cleavage and the labour-capital cleavage (van Kersbergen & Manow, 2009, 22). Regarding the relationship between modernization and welfare state development, van Kersbergen and Manow (2010, 25) propose a slightly different analysis: ‘First, it is not industrialism per se, but the establishment of a full-fledged labour market that links the modern market economy to the welfare state. Second, not only the industrial revolution, but also the national revolution, has been of extreme importance for the advent of modern systems of social protection’. Importantly, religious factors played a direct role in these national revolutions.

The literature on the relationship between religion, political action and welfare state development has also focused on explaining why confessional (Christian Democratic) political parties only emerged in certain Western countries. Manow (2015) argues that three variables—one strictly political-institutional (electoral rules), one political (the type of State-Church relationship) and the last more cultural (the presence in a given country of a confessional monopoly or not)—provide hints on the role played by religion through organized political parties. Different electoral rules have an impact on the prominence of different societal cleavages in political competition (see also Van Kersbergen and Manow, 2010). In two-party systems grounded in majoritarianism, only the labour-capital cleavage is present; all other cleavages are absorbed by this master cleavage. In countries with proportional representation, the larger number of parties with elected officials allows for the political representation of other cleavages, including the religious one, along with the labour-capital cleavage.

If there is a greater chance of having confessional parties represented in proportional representation systems, variation in intensity of the Church-State conflict affects the likelihood that confessional parties would emerge and play a key political role. In this respect, the literature

underlines that Nordic countries did not see the rise of Christian democratic parties because of the relative absence of Church-State conflict, whereas the rise of Christian democratic parties in Central and Southern Europe was the result of a strong societal and political religious cleavage. Among the countries that once featured a strong religious cleavage, the presence of a confessional monopoly, as the Catholic or Orthodox one in Southern Europe, can also explain the shape taken by religious values and preferences, within the political area (on this issue see below the last part of the present sub-section).

Regarding confessional parties, scholars primarily focused on the role of Catholicism, arguing it constituted an important determinant of welfare statism due to its social doctrine and related principles, such as subsidiarity and moral obligations towards the poor (Wilensky, 1981). Competition with left-wing parties for working class votes was also depicted as a political rationale for Christian Democratic parties to support the welfare state: these parties and, when present, their affiliated trade unions, sought support from religious (Catholic) working class voters (Stephens, 1979).

In this respect, in the first wave of research on religion and welfare state development, social Catholicism and not Protestantism was seen as the main force shaping the position of Christian democratic parties towards welfare state expansion. Protestantism was seen as a more indirect source of welfare state support, via long term secularization and democratization processes.

The second wave of research has featured a more nuanced analysis of the impact of both Protestantism and Catholicism, accounting for the role of all Christian denominations in shaping welfare state development. First, a series of scholars stressed the importance of Protestantism and the fact that often different denominations had different ideological positions in relation the

welfare state development (Backstrom et al, 2010, 2011; Kahl, 2005, 2009; Van Kersbergen & Manow, 2009; Morgan, 2006). For example, the German idea of a ‘social market’ society should be seen as the result of a compromise between Catholic and Protestant social doctrines, rather than as a sign of Catholic hegemony (van Kersbergen and Manow, 2010). Kahl (2005) analysed the influence of the three main Christian denominations in structuring the different social assistance systems that European countries developed in the early 20th century. Second, recent literature on the role of Protestantism and the welfare state in Nordic countries has challenged the claim that religion has not played a role in the historical and political process of welfare state development. As Markkola and Naumann (2014) underline, historical studies provide evidence that, in these countries, Churches and other religiously-affiliated actors were actively involved in welfare provision, thereby helping to shape key welfare debates (see also Backstrom et al, 2010, 2011; *Journal of Church and State*, 2014).

Third, as underlined above, Manow (2015) shows that the interplay between religion and the role of confessional political parties on social policy issues has to be enriched by another dimension: the presence of a ‘religious monopoly’ (i.e., the dominance of a religious denomination in a given country). Specifically, he argues that political Catholicism, as the expression of a strong State-Church conflict in nation building, appeared in two currents: ‘an intransigent and reactionary enemy of liberalism and modernity in the mono-confessional countries of Southern Europe and in a more moderate, centrist version in the denominationally mixed countries of Continental Europe’ (Manow, 2015, 34). The presence of an anti-republican and clerical right also explains the further radicalization of left-wing parties, unable to find allies for a reformist strategy in welfare state issues.

There are certain policy fields such as family policy where the relationship between religious beliefs and the actual content of social programs is especially direct. This claim is illustrated by the work of Morgan (2006, 2009) on child care and family policies and that of Quadagno and Rohlinger (2009) on the growing role recently played by the Christian right in US welfare reform, which directly intersects with family and reproductive issues. In the areas of education and family policy, the religious vote is more likely to become directly relevant and meaningful than in other social policies fields such as old-age pensions and unemployment benefits. At the same time, Quadagno and Rohlinger (2009) show that changes in the structure of partisan competition might create opportunities for a renewal of the relevance of religion in politics in majoritarian electoral systems, where the religious cleavage had traditionally been less salient.

Overall, what seems more promising for future research on the relationship between religion in welfare state development is the approach inspired by the work of Stein Rokkan. In particular, the second wave of scholarship associated with this approach (Van Kersbergen & Manow, 2009) offers a satisfactory explanation of what happened in the past and seems able, if combined with even more nuanced historical analysis, to offer helpful insights. The interplay between political-institutional variables (electoral rules), political ones (the type of State-Church relationship), and cultural ones (the confessional monopoly in a given country) represent a useful analytical starting point for the study of social policy development and the role of religion. At the same time, we must keep in mind that analytical contributions in the literature based on past findings (such as the limited role of Protestantism in Nordic countries or of religious organisations in majoritarian electoral systems) have to be constantly reassessed in light of new empirical research (see for example Markkola and Naumann, 2014; Quadagno and Rohlinger, 2009).

#### **4. Faith-based Organizations and Civil Society Involvement in Social Policy**

The role of religion in social policies is also related to what Church-related or faith-based organizations do. In many countries, Churches have historically been integrated in the provision of welfare services ranging from health care to social care to education through the ‘welfare mix’ (Salamon & Anheier, 1996). As Morgan underlines (2006, 2009), especially in Continental and Southern Europe, the idea of direct State involvement in family affairs was long viewed as unacceptable since it violated the concept of a strict separation of the public and the private sphere. In this respect, voluntary organizations were seen as a protective layer between the State (public sphere) and the family (private sphere).

In many countries, it was exactly the implementation of the welfare state that fostered and financed the growth of non-profit, Church-related organizations through the principle of subsidiarity. For instance, in Central and Southern Europe, the ‘crowding-in’ of religious organizations in the provision of welfare was a more central phenomenon than their ‘crowding-out’ by the State (Anheier, 2005; Salomon & Anheier, 1996). In recent decades, social policy innovation in social services and family policy in many countries has moved non-profit organizations, including religious ones, to the forefront of social policy reform (e.g., Ascoli & Ranci, 2002). This return of voluntary organizations is related to what Gilbert (2002) calls the ‘enabling State’, according to which the State encourages non-State actors to take a greater role in social policy provision, in a context of welfare state retrenchment and restructuring.

Table 1 reports synthetically the role played by private provision in two important social policy areas: education and health care. Table 2 shows the situation in child care. Overall, there are two different types of countries:

1. Countries where private provision is important in at least two of the three policy areas: Continental and Southern Europe; most European and most non-European Anglo-Saxon countries (the UK, Australia, the US, New Zealand);
2. Countries where private provision is important in one or even no policy area: the Nordic countries and Canada.

Unfortunately, with the exception of hospital care, the Organisation for Economic Co-operation and Development (OECD) data do not allow us to distinguish between private non-profit and private for-profit providers. However, the literature on the non-profit sector and on the different policy areas considered here show that private provision, especially non-profit provision, has often been strongly related to Churches. Therefore, in many countries where there is strong private provision, especially non-profit one, such welfare services are delivered by faith-based organisations.

Table 1. The role of private provision in health care and education: a comparative view

| Health care  | Education | Low presence of private provision | Medium                         | High in primary and secondary | High private schools    |
|--|-----------|-----------------------------------|--------------------------------|-------------------------------|-------------------------|
| Countries with mainly beds in publicly owned hospitals   |           | Canada***, Norway                 | Finland**<br>Denmark<br>Sweden |                               | The UK                  |
| Countries with a strong majority of beds in publicly owned hospitals and also a relevant private for-profit provision                              |           | New Zealand                       |                                |                               |                         |
| Countries with a majority of beds in publicly owned hospitals and also a strong private non-profit (often Church-related) and for-profit provision |           |                                   | Portugal<br>Austria**          | Spain, France,<br>Australia   | Belgium<br>****         |
| Countries with a majority of beds in publicly owned hospitals and also a strong private for-profit provision                                       |           | Italy*                            |                                |                               |                         |
| Countries with a majority of beds in private (often Church-related) non-profit and for-profit provision  |           | Germany                           |                                |                               |                         |
| Countries with a majority of beds in private non-profit (often Church-related) provision   |           |                                   | USA**                          |                               | The Netherlands<br>**** |

\*In the case of Italy many Church-related hospitals are formally public

\*\*Only in tertiary education

\*\*\*Data missing for tertiary education

\*\*\*\*Data missing for education

Source: OECD online database

Table 2. Enrolment rates in pre-primary education or early childhood educational programmes at 3 years old (2013) (% of total 3-year-old children)

| Enrolment rates | Mostly in public institutions (80%+) | In public institutions for the majority of children (51%-79%) | In private institution (often Church-related) for the majority of children (50%+) |
|-----------------|--------------------------------------|---|---|
| At least 90%    | France; Denmark; Iceland; Sweden;    | Italy; Spain; Norway  | Germany; Belgium; the UK; New Zealand   |
| 70%-89%         |                                      | Austria; Netherlands; Portugal;                               |   |
| 50%-69%         | Finland;                             |   | Australia   |
| 40%-59%         |                                      | United States   | Ireland   |
| Maximum 20%     | Switzerland                          |   |   |

Source: Own elaboration at OECD (2015)

The interplay between Church-related welfare providers, political parties and the welfare state goes in two directions: not only have welfare states often ‘crowded-in’ private Church-related provision, but faith-based organizations have also been actively involved in shaping welfare debates, as different studies show (Markkola & Naumann, 2014; Naumann, 2012). For instance, Quadagno and Rohlinger (2009) explore the alliance between the network of Christian right-wing organizations and the Republican Party in the United States, a country where there are no Christian Democratic parties. Thus, the analysis of faith-based organisations is useful to understand the role of religious actors in social policies, beyond political parties (Göçmen, 2013).

There is a new interest in faith-based organizations that partly started under the conservative governments that governed both the United States and the United Kingdom in the 1980s. The Reagan administration declared that religious organizations were more effective in the provision of social welfare than both State agencies and secular voluntary associations (Cnaan et al., 2002). Similarly, the Thatcher government sought to expand the role of the voluntary welfare sector in general as part of a broader strategy to roll back the welfare state (Billis & Harris, 1992). In Anglo-Saxon countries in the last quarter century, both Conservative parties and social-



democratic/democratic parties explicitly promoted the development of faith-based organisations, not just as welfare providers but also as partners in social policy decision making (Cnaan et al, 2002; Harris et al., 2003 Nagel, 2006).

Even more recently, the previous British Prime Minister, David Cameron promoted the flagship “Big Society” agenda as one of the core programmatic pillars of the UK’s Conservative–Liberal Democrat coalition government in 2010 (Kettell, 2012). In particular, at the centre of the Big Society was the idea of expanding the role of the voluntary sector in the delivery of welfare and social services by continuing to support the faith-friendly agenda established under Tony Blair (1997-2003) (Jawad, 2009), though Austerity brought major cuts in government spending schemes to the voluntary sector that undermined the Big Society agenda. Policymakers in other nations have also embraced a similar agenda (Dierckx et al., 2009; Friedrichs & Klockner, 2011; Oikonomakis et al., 2011). This can be seen in Germany, which has a long tradition of Church-related organisations involving themselves in welfare provision. Göçmen’s (2013) comparative study about different European countries shows that the role of faith-based organizations is becoming more important, not only in terms of provision, but also in terms of advocacy and participation in decision making.

The Anglo-American literature has tried to develop a more analytical look at what can be defined in general terms as ‘faith-based organisations’. In the British context, contemporary scholarship situates religious welfare in the voluntary sphere and generally does not distinguish between secular and religious organisations. Chapman and Lowndes (2008) focus on this issue by exploring the ways in which secular and voluntary organisations are similar, arguing that it is the faith dimension itself that is the most distinguishing feature. Sider and Unruh (2004) discuss the

concept of 'faith-based' in detail and provide their own typology of faith-based organisations based on American congregations:

1. *faith-permeated organisations*: faith is fundamental to all services, staffing and mission;
2. *faith-centred organisations*: faith is evident in all aspects of the services and staffing and mission of the organisation but some participants opt-out from the religion aspect;
3. *faith-affiliated organisations*: mainly the leadership is religious, but staff and services are not religious;
4. *faith-background organisations*: faith is part of the historical inception of the organisation and while some members of staff may be motivated by their religion, the organisation no longer has any religious aspects;
5. *faith-secular partnerships*: secular organisations that work in partnerships with religious organisations relying on their volunteers and resource base.

Bretherton (2010) notes that religious welfare organisations in the UK exhibit a combination of religious and secular characteristics, and that we should not assume that 'faith' is their defining feature. Though primarily concerned with the engagement of Christianity with politics in contemporary liberal democratic societies, Bretherton (2010) argues that the term faith is too general and derived from a Protestant Christian understanding of religion. To this end, the term risks homogenising different religious identities and phenomena, and indeed hiding the often mutual co-existence of secular and religious dimensions in any particular religious grouping. Bretherton (2010, 38) thus employs the term *faith designated group* (emphasis in original), which even eschews the term 'community' as a way of getting around the risks of essentialising and homogenising diverse religious identities, social groupings and practices. Borrowing from the American literature and authors like Bretherton (2010, 39) outlines seven key dimensions for

ascertaining the degree of religiosity in an organisation: the organisation's self-identity; the religious convictions of the organisation's members; how religion affects access to resources, shapes the goals, products and services of the organization; influences decision-making; how much authority religious figures have over the organization; and how much religion determines inter-organisational relations.

Bretherton (2010) also observes that faith emphasises a private or personal dimension of spiritual experience, leaving aside the much less-used term 'religion' and its connections to the public sphere and matters relating to social order, rules and codes of behaviour. This dichotomy is misleading and indeed potentially stigmatizing, for matters of personal belief and lifestyle cannot be separated from social and political action. Similarly, the outcome notions of social welfare, wellbeing or happiness cannot be separated from structural and process issues related to identity.

In the North American context, Farnsley (2007) argues that the term 'faith-based' became commonly used to refer to the broad range of organisations that had some religious features. The term has also come to refer to religious welfare provision in all other countries and is the main signifier of religious welfare provision in the academic social science literature, but is not without its critics (see Bretherton, 2010; Melville & McDonald, 2006). Tangenberg (2004) argued that the term 'faith-related' may be more appropriate as a general reference to organisations that have a religious character since not all services are based on faith and many have a totally secular character regardless of the orientation of the organisation. The deeply religious character and the widespread provision of religiously-based social services in North America and Europe illustrate how mutuality is seen as strengthening social solidarity since it takes a view of human needs as being intrinsically connected to community interests (Hewitt, 2000).

The emphasis in British scholarship on the voluntary sector and urban governance has also seen the development of research about the role of religious organisations in community development (Bretherton, 2010; Dinham & Shaw, 2011), drawing particularly on the work of radical political activists of the 1940s-1960s such as Saul Alinsky and Paulo Freire. Here, religious organisations are seen as agents of social change and initiators of local democratic politics, ready to get their hands dirty, live among the most deprived communities and help them bring about their own social transformation, guided by key principles such as empowerment and participation (Dinham & Shaw, 2011). Chapman and Lowndes (2008) and Weller (2009) examine the engagement of faith groups in local governance and via multi-faith forums and how they offer opportunities and challenges for civil renewal.

### **5. The Individual Level between political Values, Spirituality and Social Policy Preferences**

Recent research on the sociology of religion suggests that, even in the most secular Western societies, religion remains important to individuals (Brooks et al., 2006; Greeley, 2004). In these societies the distinction between secular and religious individuals becomes increasingly important in understanding their social and political behaviour (Olson & Green, 2006; Wuthnow, 1988). At the same time, political science and economics research has underlined the continuing importance of the religious cleavage (e.g., Brooks et al., 2006; Elff, 2007) and the effects of religious identity on conservative moral and economic preferences (Alesina & Giuliano, 2011; Stegmüller et al., 2012). Starting from Lipset, Rokkan and Lijphart's thesis that historically rooted patterns of Church-State conflict result in stable, individual level links between religiosity and voter choice (Lijphart, 1971; Lipset & Rokkan, 1967), more recent research has studied the relationship

between religious identity and political preferences in relation to welfare issues (e.g., De Graaf et al., 2001; Norris & Inglehart, 2004).

Religion is also a determining factor in the relationship between culture and the welfare state (van Oorschot et al., 2008). In particular, it plays a role at the individual level in terms of embedded, widely-shared welfare values and beliefs. Opielka (2008) focuses on the influence of religions compared to that of political value orientations. From this perspective, there are two competing sociological understandings of the influence of religion on the modern welfare state. On one hand, there is view that the welfare state has contributed to the dissolution of the family by promoting individual rights and labour market integration of women; on the other hand, there is the view associated with secularization theory arguing that the modern welfare state should be interpreted as the true heir of religious values. Van Oorschot (2006) examines European public perceptions of the relative deservingness of different needy groups (elderly people, sick and disabled people, unemployed people and immigrants). Religion is one of the independent variables considered in that study. Although some literature argues that Christians are more solidaristic towards needy people than nonreligious persons, Protestants are more solidaristic than Catholics and frequent Church-goers are more solidaristic than people who attend Church less frequently, the results of his analysis show that non-religious people are not more supportive of welfare conditionality than people defining themselves as religious. The study also finds that there are no important differences between Catholics and Protestants in terms of welfare attitudes. According to van Oorschot (2006), Church attendance is the only religious variable that significantly shapes welfare attitudes, as people who attend Church more frequently are less conditional in their solidarity towards needy groups.

From another perspective, rational choice approaches argue that religion and social spending can be considered substitute mechanisms that insure individuals against adverse life events. Thus, religious individuals prefer lower levels of social insurance than secular individuals and, as a consequence, countries with higher levels of religiosity have lower levels of social spending (Scheve & Stasavage, 2006). This correlation should also work the other way around. For instance, Gill and Lundsgaarde (2004) argue that religious participation is a function of government welfare spending. Churches have historically provided social welfare, but as governments assume many of these welfare functions, individuals tend to reduce their level of participation since the desired welfare goods can be obtained from secular sources.

A more specific stream of research looks not just at religious values, voting and welfare issues, but also at the interplay with other socio-economic characteristics. For example, research by Stegmueller (2013) examines the link between religion, voting behaviour and attitudes towards the welfare state. In particular, the study investigates the reasons why some individuals who would potentially benefit from redistributive policies do not support parties offering these types of policies. The main finding in this research is that religion remains a key factor in shaping voting behaviour: religious individuals refrain from voting for redistributive parties because they are more conservative, both morally and economically, than their secular counterparts. According to Stegmueller (2013), the role of religion is therefore twofold. First, it shapes individuals' moral preferences: religious individuals hold more conservative positions on moral issues and, living in increasingly secularized societies, they turn to conservative parties that pledge to implement morally conservative policies. Second, religion shapes individuals' economic preferences. Those who identify with one of the major Christian denominations hold clear anti-welfare views and prefer more conservative economic policies. They are thus less likely to vote for a redistributive

party, irrespective of other socio-economic characteristics. This identity effect of religion does not differ between Catholics and Protestants; the main cleavage lies between religious and secular individuals (Stegmueller, 2013). Similar conclusions are reached by De la O and Rodden (2008): religion undermines the negative relationship between income and left voting. In particular, this correlation disappears among religious individuals. The votes of religious people are better explained by their positions on moral issues rather than on economic issues, especially in countries with multiparty systems.

Emmeneger and Manow (2014) add gender to their research and study the interplay between gendered voting, religion and social policy. These two scholars study why there has been a shift in women's voting preferences since the 1980s; traditionally more conservative than men, women have become more likely than men to support left-wing parties. In explaining such a phenomenon, the authors highlight the importance of the religious cleavage in the party system across Western European countries, restricting the free flow of religious voters between left and right parties, given the higher degree of religiosity among women and a persistent impact of religion on voting choice. In relation to welfare issues, their article highlights how 'women, as religious core voters, for a long time could not credibly threaten to become socioeconomic swing voters, i.e. to switch to a left party. That is why religious parties, for example Christian Democrats, could afford—at least to some extent—to ignore women's socioeconomic interests' (Emmeneger and Manow, 2014,188) and abstain from developing formal child care and formal support for work-care reconciliation. However, in recent decades as women's religiosity in particular has declined, Christian or Conservative political parties have begun to compete for the female vote by catering to their socioeconomic interests.

Overall the literature on individual values, religion and the welfare state, which often introduces other socio-economic variables, offers many insights from the micro-individual level on how the complex relationship between social protection systems and religion works. One of the most important findings in this stream of literature is that the principal dividing line in behavior is between religious people who regularly attend services and those who do not. Such distinction appears more important than the differences among religious denominations. In other terms, at the individual level, it seems that being religious in itself, and not one's specific faith, shapes welfare state preferences and behaviors.

However, there is also another stream of research that studies the relationship between the welfare state and individual behaviours and values. The burgeoning literature on spirituality and holism has engendered a rethinking of the role of religion in contemporary understandings of wellbeing. Empirical research on spirituality in the UK has been reported on as a revolutionary paradigm in key works by Heelas and Woodhead (2004), Spalek and Imtoul (2008), Holloway and Moss (2010) and Furness and Gilligan (2009). These researchers highlight more subjective and relational understandings of wellbeing that take into account the individual's moral values, their ethnic identity and concerns, and how their relationship with God or another transcendental force shapes their attitudes, self-perceptions and coping strategies. Whether these individuals are new age therapists, unemployed youths or elderly people of an ethnic minority background, a new wave of research in the sociology of religion and in social work in the UK is now beginning to take spiritual values and needs into account. For some, this is part of a broader engagement with the notions of quality of life (e.g., Holloway & Moss, 2010). For others, it is a more effective way to meet the cultural needs of an increasingly demographically diverse British population. What it signals for some analysts is an apparent weakness in the formal institutions of state welfare to build



links with local communities. Rather, the argument is that the impersonal nature of publicly provided services, especially in the administration of social care, work and unemployment services, has alienated service users and increased issues of stigma and loss of dignity.

Thus, the spiritual dimension of wellbeing means that social welfare provision must seriously take into account the role of individual dignity, emotions and social relations. It responds to the growing discontent with the impact of individualism on contemporary society (Kenny and Kenny, 2006). Particularly in the fields of mental health and palliative care, and in relation to the elderly, the search for meaning in one's life becomes ever more pertinent (Holloway & Moss, 2010).

Crucially, the new resurgence of interest in spiritual wellbeing in European societies signals the de-institutionalization of religious identity and reinforces a more individualised interpretation and experience of religiosity in the contemporary era. On one hand, this argument harks back to Grace Davie's long-established thesis of "vicarious religion" in Europe (2007); and on the other hand, it raises the issue of how social policy in a changing European context is to deal with new social contingencies that are not just dependent on social class and income redistribution but on identity politics and the need for recognition of cultural differences. The challenge, therefore, is how standardised welfare systems can continue to address the needs of a diverse society in an equitable manner, whereby personal religious views are more paramount. For instance, the issue of wearing face covering (such as the burqa) by Muslim female teachers presents itself as one such challenge. The legitimacy of State funding for faith-based schools is also another key issue.

## **6. Discussion**

The previous three sections discussed key findings about how religion has influenced welfare state development. From a political party perspective, it is important to focus on the interplay between political-institutional, political, and cultural variables. From a faith-based organization perspective, From an individual-level perspective, being religious (measured by attending services regularly), more than one's religious denomination, seems to be the crucial variable shaping individual preferences and behaviors toward the welfare state.

The review of these main findings of the literature on the relationship between religion and the welfare state can help us map future research in the field. In particular, it can be useful both to take a new look at 'old' Western country cases and to study the relationship between religion and social policies in other parts of the world, as we do in this last section.

There are good reasons for renewed research on the relationship between religion and the welfare state in Western countries. First, in order to convince those voters that are not easily attracted on the basis of the labour-capital cleavage, political parties keep on using social policies (especially services like education) for electoral gain, framing them in terms of cultural and religious values. For instance, the Quadagno and Rohlinger's study (2009) on the Christian right's role in US welfare reform in recent decades shows an increasing programmatic overlap between political parties on the ideological spectrum. As a result, parties are mobilizing along denominational lines, and religiously based social movements force the issues they consider salient onto the political agenda.

Second, populist (right-wing) parties have arisen in many Western European countries. As argued by Kriesi (2014), a new political cleavage has come with globalisation, along with the more traditional labour-capital one: the 'integration-demarcation' cleavage. Populist parties try to mobilize the 'losers' of globalisation (e.g., workers facing the risk of unemployment or worsening

labour conditions) by appealing to cultural anxieties: ‘given the “losers”” heterogeneous economic interests, (cultural anxieties) provided the least common denominator for their mobilisation. The long-term tide of populism was, in other words, not driven in the first place by economic, but by cultural motives’ (Kriesi & Pappas, 2015, 3). Given the growth of migration in many Western countries and, in recent years, the larger flows of refugees, how States should respond to the growth of minority migrant populations with different religious backgrounds and beliefs has become a central issue. In this sense, social policy, politics and religion mingle with migration (i.e., social) policies. The nexus between the welfare state and religion again acquires a strong salience at the three levels considered in the present essay: political parties, faith-based organisations and individual values. The concept of ‘welfare chauvinism’ (Andersen & Bjørklund, 1990) has increasingly been at the heart of populist parties’ agendas as they advocate for restricting access to welfare services to national, cultural and ethnic ‘insiders’, thereby excluding ‘debilitating’ groups, primarily immigrants. To a large extent, the contemporary presence of religion in social policy points to a shift in focus away from issues of resource management and redistribution to issues of identity, cultural values and recognition.

Third, if a cultural cleavage has become important (again), and given the fact that a religious cleavage or religious values can play a bigger role in certain policy fields, certain specific social policies are more interesting to study than others. Education and family policies are particularly sensitive fields in terms of moral and religious issues (concerning socialization, family reproduction, etc.). Unemployment, housing and social assistance policies are highly sensitive issues for ‘welfare chauvinism’ dynamics. However, in countries where there has been a strong tradition of religious provision, an expansion of direct public provision/coverage could interfere with the principle of subsidiarity. Religious agencies might not want the State to intervene directly

and regulate how provision is run. In these cases, the point might be less about public funding but more about maintaining (publicly funded) provision without too much regulatory ‘interference’.

Fourth, a new or broader role in welfare provision for faith-based organisations and the Third Sector more generally can also present a potential opportunity for religious bodies to promote religion in the public sphere, especially at a time when religious affiliation seems to shrink. This is what Kettell (2012) argued in relation to the Big Society under David Cameron in the UK, though it is clear that the faith-friendly politics of contemporary British social policy was given its first substantial push under the leadership of Tony Blair (1997-2006). Nevertheless, it is in new phenomena such as the rise of food banks under Austerity that religious welfare provision reappears. For example, the largest franchise of food banks in Britain is called the Trussell Trust, an organisation that has its roots in Christian Philanthropy. Findings on the nexus between religion and welfare issues in Western countries can be also useful for researchers interested in other parts of the world. Although the main aim of the present contribution is to focus on what we have learned on Western European and Anglo-Saxon countries, a project that aims to study the relationship between social policies and religion in non-Western countries and to test the generalisation of the research’s results beyond Western countries could test the following research hypotheses and questions.

First, among non-Western countries, there are some that have heavily industrialised in recent decades and others that have not. Across such different contexts, does the finding that social policy develops more as the result of the creation of a modern labour market than as the result of industrialisation in itself hold? If in Western countries the interplay has been for a long time between the state, (industrial) employers, trade unions (representing working class people employed in manufacturing), and Church(es), how does it work in countries where

industrialisation is not a pivotal phenomenon? One hypothesis to test is that the Church and faith-based organisations might have even more room to shape social policy when there are no other powerful actors in society that have their own resources based on the manufacturing world.

Second, the relationship between the type of political regime, social policy, and religion is also a complex one. Some developments in modern welfare states in Europe took place in undemocratic or even totalitarian times. The (German) Nazi or the (Italian) Fascist social policies are good examples. At the same time, most of the literature on the role of religion in Western countries has focused on changes that took place after the Second World War under democratic regimes. Trying to use what we have learned from Western countries and apply it to other countries is a complicated task. If we look at democratic countries where religion remains an important part of many citizens' life, we could still see whether we could generalize the findings derived from the study of Western countries. In particular, we could put forward the hypothesis that Majoritarian democracies leave less direct space for explicitly religious parties (but much more room for faith-based organisations), whereas the opposite is true in Parliamentary democracies. Within Parliamentary democracies, we can assess whether a) the level of conflict or collaboration between the national State and religious actors affects welfare state development and, where there has been traditionally a conflict, whether the tension between religious monopoly and pluralism affects differently the way social programmes develop and how social policy is used in inter-faith competition and collaboration dynamics. A hypothesis would be that in all these countries where there has not been a State and Church conflict, we should see a development toward a more egalitarian and universalist welfare state (as in the Nordic countries). Instead, where there has been or there is such a conflict, social programmes should be shaped by religious pluralism or monopoly. We should expect to find that the most fragmented (in terms of who benefits from State

intervention) and the least developed welfare state systems are located in countries with parliamentary democracies and a tradition of conflicts between the National State and the (monopolistic) Church.

Third, what is the interplay in different parts of the world between social policy development and faith-based organisations? How much do the State and these types of organisations crowd-in or crowd-out each other? What are the social policy fields where they are more active (education, social assistance, etc.)? Do these organisations play a positive role in social innovation? What is the political role played by faith-based welfare providers and other religious actors (Churches, associations, etc.)? How much is welfare provision a source of legitimacy and power for these organisations in the political arena?

Fourth, the literature on the relationship between religion and social policy at the individual level clearly shows that attending services regularly (as a proxy of a being a “religious” person) shapes more attitudes and behaviours toward the welfare state and social policy issues than the specific contents of the faith individuals belong to. The hypothesis to test in this case is whether it is really the case once we look at non-Christian religions and at countries located in other regions of the world, or whether one’s specific faith matters in a more global perspective.

Finally, a last open question remains concerning non-democratic regimes and countries where a large part of the population is atheist but another important part has religious beliefs. More comparative studies are needed to see what happens to the religion and social policy nexus in these regimes and countries. Overall, all these questions constitute an extremely rich research agenda that could improve our understanding of social policy, religion and politics around the world.

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