1.2   Research profile of the Collaborative Research Center

1.2.1   Summary of the research program

The Collaborative Research Center (CRC) 1342 "Global Dynamics of Social Policy" analyzes social policy from a global and historical perspective. It goes beyond previous research in three regards: **Geographically**, by systematically including the Global South in the analysis and by breaking with the OECD-centrism of prior research. **Conceptually,** by broadening the understanding of social policy to include education policy, immigrants' social rights, and international cooperation as fundamental areas for promoting equal opportunities. **Analytically**, by replacing methodological nationalism with an interdependency-centered approach that puts the national determinants of social policy into the transregional and international context.

The third phase sets the keystone in our 12-year research agenda. Phase I (2018–2021) mapped and explained the introduction of social protection programs worldwide. This crucially involved the creation of the new **Global Welfare State Information System** (**WeSIS**). Phase II (2022–2025) mapped and explained variance in the **inclusiveness** and **scope of benefits** of social policies across countries and over time. The data platform WeSIS was greatly expanded during the process. Available since late 2024 for a soft opening and officially launched for early access in February 2025, it constitutes a groundbreaking database for global welfare state research, unrivaled in depth and breadth. Phase III (2026–2029) will examine the **socioeconomic effectiveness** of social policy in improving social conditions by mitigating socioeconomic conflicts and fostering **political integration**. The dependent variables of the first two funding periods—introduction, inclusiveness, and scope of benefits—constitute decisive independent variables for Phase III. WeSIS will provide the essential data to analyze how these social policy variables affect socioeconomic effectiveness and political integration domestically and internationally.

Based on our new **WeSIS** data, the key findings of the first two phases were the globality and variety of welfare policies. Despite substantial variation in design, inclusiveness, and scope of benefits, virtually all states worldwide have or at least claim to have social policy programs. The welfare state is closely linked to the promise to mitigate socioeconomic conflicts over time and across classes and to tie individuals and groups to the political system. In some countries at some time, this promise was more or less kept, while in other countries, at other times, it was failed partly or entirely. In fact, socioeconomic conflict and political polarization appear more prevalent today than ever since the end of the Cold War. This puzzle is the focus of the third phase of the CRC: **Why has the global diffusion and expansion of social policy resulted in greater socioeconomic effectiveness in some regions at some times compared to others, and why has it fostered stronger political integration in certain parts of the world while failing to do so elsewhere?** More specifically, we ask: When has the welfare state kept the promise of mitigating socioeconomic conflicts, and when have its social policies proved ineffective? When has the welfare state managed to tie individuals and groups to the political system, and when did it fail at political integration?

To address this research puzzle, the dependent variable in the third phase is located on two dimensions referred to as socioeconomic and political outcomes. The **socioeconomic outcome** dimension reflects material effects such as the allocation of resources (e.g., income, services), distributive outcomes (poverty, inequality, risks), and individual responses to these outcomes, such as crime and life satisfaction. Other socioeconomic outcomes include social policy impacts on economic performance in terms of employment, economic growth, or public debt. The **political outcome** dimension reflects the effects of social policies on citizens' support for and demands on the political system and on power relations within that system. This includes social movements, political protest, and changing political attitudes and behavior.

The organization of the CRC into two project areas has proven successful and will be maintained. The six projects of project area A will primarily focus on the socioeconomic and political impacts of social policy globally from a macro-comparative perspective. Area B's six projects will primarily examine social policy's political and socioeconomic consequences in selected countries or world regions, often by combining macro- and micro-perspectives. The Information Infrastructure Project (INF) will continue to provide a common data and methods platform for both project areas. During Phase III, INF will further enhance sustainable research data management and **Computational**

Social Science (**CSS**) methods for comparative welfare state research. Both are key to establishing WeSIS as a major global welfare state research resource.

1.2.2   Detailed presentation of the research program

The research program for the third phase of the CRC builds on the findings and achievements of the two preceding phases. We summarize these findings and achievements in three steps. First, we briefly summarize the design and main findings of the CRC. Then, we explain the insights generated by the individual projects, starting with the WeSIS information system and continuing with project areas A and B. We conclude with an overview of the CRC's publication output during the second phase. From this basis, we derive the research program for the third phase.

Research program and findings of preceding phases

Since 2018, the CRC 1342 has been investigating the developmental dynamics of social policy from both global and historical perspectives. In the *first* funding phase, the CRC focused on the history of introducing and designing social protection systems from a global perspective. Researchers advanced the central thesis that welfare state development has been significantly shaped by horizontal transnational interdependencies (between states and societies) and vertical interdependencies (between states and citizens/other relevant actors) alongside the national configurations of domestic institutions. To empirically test this claim, historical data were collected and analyzed for a broad set of countries, spanning from the 1880s to today. The first phase of the CRC started with 15 projects in two project areas: The six macro-quantitative projects of area A investigated the introduction of social policy programs and their design in the fields of social policy (including education) for as large a country sample as possible, while nine projects in area B used country and regional studies and small-N comparisons to study welfare state development. Under the leadership of project A01 (later INF), project area A began with the co-creative development of the web-based **Global Welfare State Information System** (**WeSIS**), continuing both data collection and software development in the second phase of the CRC 1342.

The *second* phase retained the architecture of Phase I with research areas A and B. However, we relaxed the methodological division into a quantitative project area A and a qualitatively-oriented project area B, making extensive use of mixed methods approaches. The overarching theme of the second CRC phase was the developmental dynamics and trajectories of social policies after their initial introduction. Reflecting different dimensions of social protection, our research focused on two developments: In what we call the "personal dimension", we examined the inclusion and exclusion of societal groups ("who gets what"), while in the "material dimension," the spotlight was on the expansion of the scope of benefits ("and how much"). **Inclusiveness** (the personal dimension of generosity), and **scope of benefits** (the material dimension of generosity) are the two dimensions describing a welfare state's level of generosity. Projects in the second phase contributed to analyzing welfare state generosity from a global perspective and over time by providing a coherent theoretical framework for welfare state measurement. To this end, all projects in area A collected data to map and measure inclusiveness and scope of benefits across various fields of social policy, integrating this information into WeSIS. Projects in area B focused on analyzing causal mechanisms, refining conceptual frameworks, and developing explanatory models.

The results of the first and second phases of the CRC can be summarized in three key findings: the globality of welfare policies, the institutional variety of welfare policies, and the political promise of welfare policies. The findings demonstrate the global diffusion of welfare policies, their high degree of variation, and their presumed role in socioeconomic stabilization and political integration.

(1) Globality of social policies. One of the most striking findings from Phase II and the results from area A is the global spread of social policies (see Figures 2–3 below). Today, almost all countries, regardless of their economic development or political system, have established some form of welfare state or at least claim to have one. This global diffusion of social policy reflects a broader trend in which social protection is now recognized as a fundamental function of the modern state. Even in countries with weak state capacity or limited fiscal resources, governments have introduced social programs, often under pressure from international organizations (see findings from A05 on education or A04 on healthcare), global norms (see A03 on the development of labor law and A07

on long-term care policies), or domestic political competition. This expansion is evident in the rise of cash transfer programs (e.g., see A06 on family policies), universal healthcare (A04), and pension systems (A02) in many parts of the Global South.

(2) Variety of social policies. Despite their global spread, social policies remain highly diverse. The B projects found broad variation in scope, timing, and direction of generosity development across the globe, as well as complex causal mechanisms that explain the development. Welfare states vary significantly in their benefit levels, inclusiveness, and institutional design. Some countries provide comprehensive, universal social protection, while others rely on means-tested or contributory schemes that exclude large segments of the population. B projects uncovered a general trend toward the expansion of both scope of benefits and inclusiveness in the Global North. Similar developments also occur in the Global South, but often at a slower pace and more frequently de jure than de facto or with unequal access (e.g., expansion of social insurance in China in terms of scope but not in terms of inclusiveness, see B05). Welfare institutions vary widely, shaped by historical legacies, political regimes, economic structures, and demographic pressure. While international organizations strongly promote more inclusiveness (e.g., the inclusion of vulnerable groups and informal sector workers) and thereby shape national welfare state development in the Global South (see B12), they also affect the choice set of policy instruments available to policymakers, fostering the implementation of specific social policies. As B09 revealed, by promoting the instrument of social cash transfers, IOs have a positive impact on generosity, but they may hinder more fundamental welfare state restructuring based on the needs of the countries' socioeconomic composition, land inequality, and economic integration. Trade protectionism has also been identified as an important determinant of the expansion of the welfare state (see B11). Protectionism can expand program generosity in several fields of social policy by creating revenue needed for policy expansion (see B11). Next, wars have left their imprint on national welfare state generosity. While large-scale conflicts such as World War I and II and the Cold War have been decisive for social policy expansion in terms of the scope of benefits and inclusiveness, civil wars had the opposite effect. However, the impact of wars varies depending on the level of economic development and the political regime type (see B10). These examples demonstrate that there is not one single social policy development model but multiple pathways shaped by context-specific political and economic factors.

(3) Political promises of social policies. A third key finding is that the introduction and expansion of social policy are closely linked to the promise of political integration and economic stabilization. B01 provides an important conceptual classification of group construction and legitimation, finding that legitimation has shifted from purely economic issues to societal issues and questions of (anti-)discrimination. Welfare states have historically emerged as responses to socioeconomic conflicts—such as economic crises, labor unrest, and social inequality—with the promise of mitigating risks and reducing class-based tensions (Wilensky, 1975; Béland et al., 2021). Moreover, the welfare state was a major promise in the Atlantic Charter of the Western allies during World War II (see B10). In many cases, governments have expanded social protection not only for humanitarian reasons but also to ensure political stability, legitimize state authority, and promote social cohesion, as projects in the B area uncovered with extensive case study analyses. As B10 showed, governments in the socialist bloc deliberately implemented social policies during the Cold War to bolster their legitimacy and stability and, thereby, ensure regime survival. B05 identified the strategic implementation of maternity benefits in China as a solution to the fertility crisis, whereas B11 showed how social policy instruments were used to buffer the perils of economic integration. Moreover, promises related to social policy have also been made at a global level by International Organizations (IOs), not least in the field of education policy. Maximum inclusiveness and access to high-quality education for every child, with particular emphasis on female education, are essential issues in documents produced by globally active IOs, such as UNESCO. In contrast, regionally active or culturally specific IOs active in education promise to preserve local or religious identities (A05). These examples from the projects suggest that social policies have been promised to function as economic safety nets and tools for political inclusion.

Figure 1. WeSIS user interface
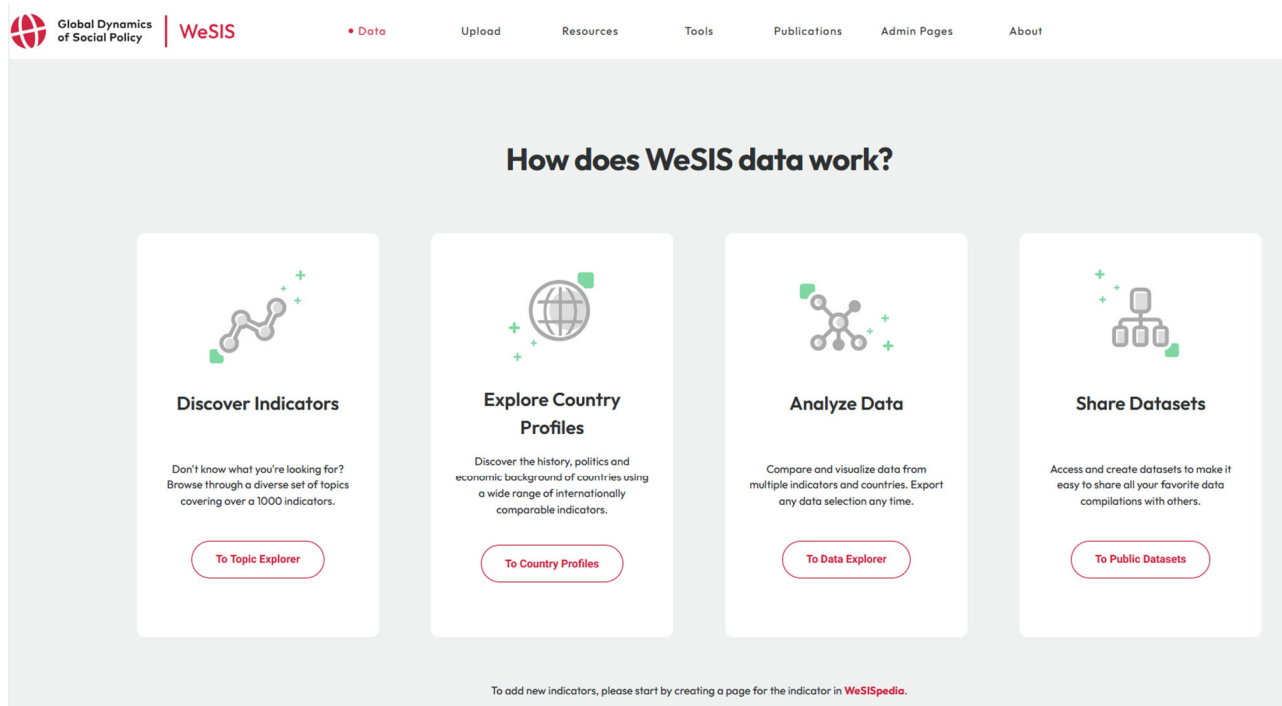
Global Welfare State Information System (WeSIS). The data collected by the CRC's projects were integrated into the WeSIS database (www.wesis.org). WeSIS constitutes a key achievement of the INF project, which was responsible for developing its infrastructure during the second funding phase. Initially, the A01 project co-created WeSIS with research area A during the first phase of the CRC (Molina León et al., 2022). In the second phase, A01 underwent a structural change and became an INF project to better reflect the shift from creating to further developing and maintaining the system and the data. With the public soft launch of WeSIS in December 2024 and early access launch in February 2025, INF successfully fulfilled one of its primary objectives. INF was pivotal in coordinating the cross-project data collection following the FAIR principles (Wilkinson et al., 2016). It facilitated workshops on conceptual challenges, organized "data hackathons" to accelerate data collection and documentation, and convened monthly principal investigator (PI) meetings on organizational topics. WeSIS sets new standards by (1) providing an encompassing documentation (WeSISpedia, a collaborative Wiki) and (2) assessing and labeling the data quality of individual indicators. At the start of the second phase, an eScience platform (https://escience.wesis.org) was established (accompanied by introductory workshops), which provides an easy entry point to services and tools spread across different providers to support the CRC members' daily work. INF also offered two-day research data management (RDM) workshops each winter term, primarily for CRC researchers but open to all social scientists. To put the concept of an embedded data manager and local research data support team into practice, INF established multiple communication channels, providing a first point of contact for advisory sessions and Q&A discussions on RDM matters.

Figure 1 shows the WeSIS landing page, from where to start navigating. As this visualization reveals, WeSIS offers a large set of features beyond data provision. Site visitors can discover indicators, explore country profiles, retrieve maps for the available indicators and years, analyze data, and share datasets. WeSIS fills a critical gap in the data landscape, especially for the Global South. The extensive data collection effort represents a significant innovation. Measuring welfare state generosity is complex, even in well-documented Western democracies (Ferrarini et al., 2013; Scruggs, 2013, Nelson et al. 2020). The CRC's global data collection faced substantial challenges, including conceptual issues in defining policy scope. Many countries have overlapping programs, such as pension schemes and healthcare systems, requiring decisions on which to prioritize for "representativeness" and how to capture fragmentation. A similar issue arose in defining comparable eligibility groups globally for "contextualized comparison" (Locke & Thelen, 1995). Federal systems posed additional complexities in coding national-level data given regional variation. Practical

obstacles included accessing archives, legal texts, and native-language resources—sometimes requiring translation before coding. Some initial collection goals were unmet due to the exponential effort required, particularly for historical data, but we expect 2000+ indicators to be available at the latest at the end of the second phase in December 2025.

The CRC's ambitious goal of gathering and compiling key information for measuring the generosity of welfare states for all countries with more than 500,000 inhabitants in order to close existing gaps—particularly regarding the Global South—has been achieved. Unsurprisingly, many indicators cover Western democracies, foremost the Scandinavian welfare states and Western European countries (1200+ in each case). However, WeSIS also contains considerable data for countries that are rarely included in welfare state research, such as Somalia with 734 or Eritrea with 701 indicators. In terms of temporal coverage, the amount of data has increased in recent times. For the period between 2000 and 2010, more than 1000 indicators are available for every year. Historical data are also well represented, with 435 indicators documented for 1900. As with any data collection effort of such size in the social sciences, some data are and will always be missing. Addressing and overcoming many of these challenges, the expanded dataset is still invaluable and unrivaled for mapping global social policy dynamics.

WeSIS is remarkable not only because of the quantity but also the quality and uniqueness of the data, which reflects the capabilities and efforts of the entire CRC and its cross-project activities. Table 1 highlights the number of indicators per social policy field collected as part of the CRC, reflecting the key concepts of both funding periods—introduction of social policies in Phase I and inclusiveness and scope of benefits in Phase II. In addition, numerous indicators capturing the institutional design of social policies were gathered, compiled, and coded. All indicators counted in the table are already available in the projects (and, to a large extent, already available online in WeSIS). The data upload will be completed in late 2025, as some indicators are subject to priority use (embargo) due to ongoing publication processes. WeSIS will be accompanied by video tutorials, workshops, and webinars to engage users and teach them how to benefit from it in their research, making WeSIS remarkable beyond mere data availability.

WeSIS also contains data beyond social policies, namely relevant indicators to *explain* the CRC's key object of investigation: the global dynamics of social policy. This means that researchers can retrieve harmonized and country-mapped dependent and independent variables from WeSIS as a single source ("one-stop data shop"), eliminating the need for time-consuming and error-prone data wrangling from different sources. These data are classified into the two main categories, *National Attributes* and *Global Linkages,* following the CRC's interdependency-centered research approach. As a result, WeSIS contains data that (1) only exist in WeSIS (original CRC) as well as datasets (2) that originate from other sources and were either significantly edited by CRC researchers (CRC compiled) or (3) that could be fed into WeSIS as they are (third-party data), provided that the legal situation permitted this. Table 1 shows how many indicators are exclusively available in WeSIS (original CRC and CRC compiled) and how many third-party indicators are stored in WeSIS (as of January 15, 2025).

Table 1. *WeSIS data according to social policies, national attributes, and global linkages (as of January 15, 2025)*

	Indicators	**Original CRC**	**CRC Compiled**	**3rd Party/others**
Social policies	**1083**	**364**	**74**	**645**
Old-age and survivors' pensions	59	59		
Labor and labor market	94	23	30	41
Health and long-term care	472	89	27	356
Education and training	254	60		194
Family and gender policies	173	102	17	54
Immigrant social rights	(31)	(31)		
National attributes	**340**	**12**	**72**	**256**
Policy legacies	1		1	

	Indicators	Original CRC	CRC Compiled	3rd Party/others
Economic and financial factors	31			31
Political factors	62		14	48
Social structure	57			57
Culture	160	12	49	99
Geography	8		8	
Sustainable development goals	21			21
Global linkages	**124**	**5**	**106**	**13**
Communication	1	1		
Political institutional linkages	43		43	
Economic relations	15	4	11	
Migration	10		10	
Violent conflicts and colonial dependencies	55		42	13

Note: Immigrant social rights indicators have an embargo for upload until June 2025. This is indicated with numbers in parentheses. Numbers in bold font refer to the sum of indicators in the column.

WeSIS keeps growing and will contain at least 1,686 indicators for measuring welfare states globally and historically (Y variables "Social Policies" in phase I and II). It already encompasses 76 indicators on the date of introduction of state-sponsored social policies, 696 on inclusiveness, 342 on the scope of benefits, and 572 on institutional design.

The following maps exemplify insights into the new data for measuring inclusiveness and scope of benefits for selected fields of social policy. A cursory examination of the figures reveals the expected pattern of a North–South dichotomy, with advanced economies featuring higher values for the scope of benefits and inclusiveness of welfare states. Our data thus demonstrate the persistence of the global divide in welfare state generosity over time. However, our data provide a much more nuanced picture of global welfare generosity. The exemplary coverage indicator for essential health services (Figure 2) illustrates massive improvements in basic healthcare provision in many regions in the Global South (e.g., Latin America and Southeast Asia), matching the basic coverage achieved in high-income economies. Innovative indicators such as the child benefit indicator (Figure 3) reveal notable parallels between Europe, Latin America, Australia, and Canada in terms of generosity development. Other original CRC indicators, such as the long-term care index, may serve as a nuanced instrument to measure generosity toward specific population segments.

Looking at inclusiveness across projects and policy fields, considerable discrepancies emerge between the Global North and the Global South. Coverage rates are generally lower in the Global South, as shown in Figure 2. For example, even when high de jure coverage has been enacted due to colonial entanglements or international pressure, this is seldom reflected in the *effective* coverage rates in the Global South (Grünewald, **2022a**; Son, **2025**). Furthermore, gender-related differences can often be observed. Equal access to education (Besche-Truthe et al., **2024**, Windzio et al., **2025**) or to family policy benefits (Böger et al., **2025**), for example, is often only guaranteed in the Global North—but is also accompanied by gender discrepancies in other areas as the Japanese pension system reveals (see findings from A02). Informal employment relationships are often related to low coverage rates and unequal access to social benefits. Furthermore, the example of family policy shows that exclusion from formal welfare state programs cannot be compensated for by corresponding informal networks (Son et al., **2025**).

Unsurprisingly, a similar pattern emerges concerning the scope of benefits, where we find discrepancies between the de jure entitlement and the de facto benefits. The automotive industry exemplifies how, at the individual level, labor law benefits vary depending on a company's position in the value chain. Accordingly, employees experience different levels of protection under labor law. At the collective level, the power of trade unions is the primary driver of the protection provided by labor law (see results from A03). In the area of family policy, the Nordic countries and Western European countries offer particularly generous and progressive programs while also taking the

interests of both genders in parental leave into account through a mix of different models (Drobnič & Son, **2025**). The example of child benefits reveals an expansion of the scope of benefits in recent decades but with a reduction in some countries of the Global North, such as the Czech Republic, Greece, Ireland, Israel, or New Zealand.

Figure 2. *Coverage index for essential health services (de jure) 2021*
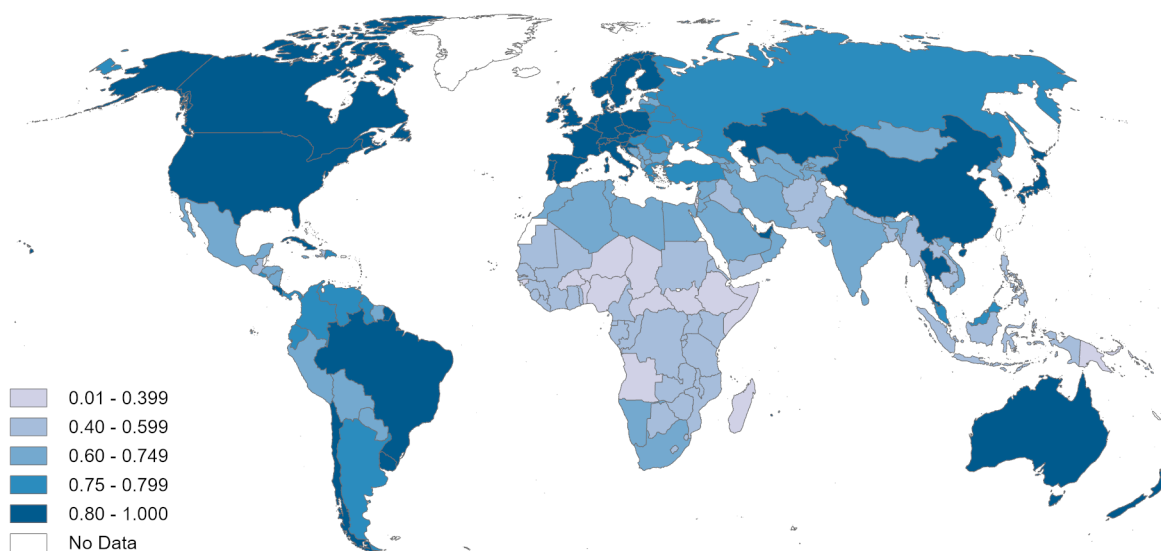
Note: Coverage of essential health services that include reproductive, maternal, newborn, and child health, infectious diseases, non-communicable diseases, and service capacity and access among the general and the most disadvantaged population. The indicator is measured as an index reported on a unitless scale of 0 to 100, which is computed as the geometric mean of 14 indicators of health service coverage (higher values indicate better coverage). Source: WeSIS (January 2025).

Figure 3. *Child benefit—Maximum value for a school-age child in US $, 2019*
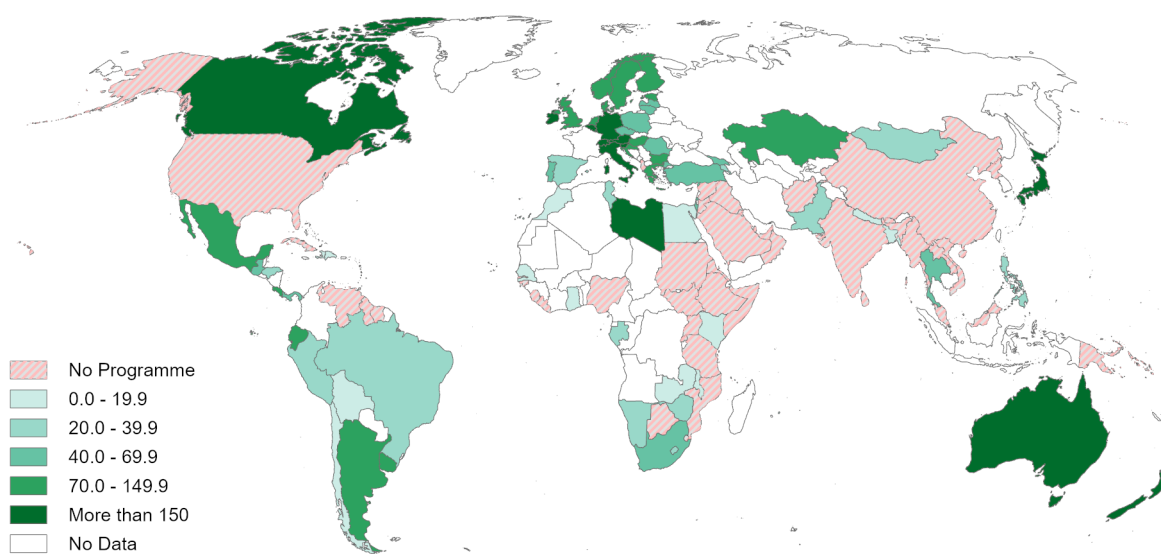
Note: This indicator reflects the (equivalent) per child amount. It is the maximum value for a school-age child unless a maximum is not applicable/available, in which case the minimum value per child is used. When the benefit is received per household, the per child equivalent is calculated based on the average number of children in the country across households with children. Source: WeSIS (January 2025).

Project area A. **A02** examined the globality and variety of the following social policies: work-injury compensation, unemployment insurance, and old-age pensions. Moreover, a detailed case study on means-tested social pensions was conducted in Bangladesh. The project collected data on inclusivity and generosity, covering work-injury compensation laws since the Industrial Revolution in 187 countries (GWIP). It analyzed labor force coverage, replacement rates, and social insurance development using ILO and SIED data (Breznau, **2025**). For unemployment insurance, the dataset includes coverage, benefits, and eligibility for 83 countries from 2000 to 2019, with legal histories dating back to 1905 (GUID). The old-age pension dataset (PENLEG II will be deposited also with GESIS at the end of March with user embargo until December 2025) covers more than 800 variables and spans 100 countries of the Global South, tracking eligibility criteria, benefit generosity, and legal coverage since 1900. Many pension systems were initially fragmented but later integrated. In former French colonies in Africa, broad beneficiary definitions led to high legal coverage but low effective coverage (Grünewald, **2022**a). Moreover, nondemocratic regimes were more likely to implement social insurance schemes than other pension designs as this program type was best suited to bind citizens to the state (Grünewald, **2022b**). Preliminary findings from Asia suggest that financial crises contributed to expanding pension systems. In addition, Japan's pension evolution reflects gender discrimination, partly influenced by economic growth strategies. Beyond country-level analyses, A02 assessed social pension targeting in Bangladesh, conducting a large-scale household survey (N=3,688). Findings indicate poor targeting due to weak local government capacity, making improvements challenging (Asri et al., **2024**). Overall, the data collected by A02 offer a strong foundation for further research on social security program dynamics.

A03 investigated inclusiveness and scope of benefits in the policy field of individual labor law. Contrary to political promises of social policy, labor law not only protects but also excludes and marginalizes working people (Mückenberger & Dingeldey, **2022**—recognized by the publisher Wiley as a "top cited article 2022–23"). The project developed an in-depth historical and theoretical understanding of legal segmentation, identifying varieties of social policies in the Global South and the Global North (Fechner et al., **2025**). Establishing the Worlds of Labour (WoL) database as part of WeSIS, we collected data for more than 150 countries with 35 indicators on individual labor law, partially reaching back to 1880. The database enlightens global labor law evolution, particularly in the Global South, e.g., the impact of colonialism on the construction of labor law that regulates the standard employment relationship (e.g., Mückenberger & Schäfer, **2025**). Racial and gender segmentations established in early colonial regulatory systems are highly stable and path dependent, surviving the critical juncture of decolonization. Case studies of regional production clusters in the automotive industry in South Africa and Mexico identified significant discrepancies between de jure and de facto inclusiveness regarding the benefits of individual labor law. Combining theories of global value chains and gender and segmentation theory, A03 findings revealed that atypical forms of work, such as fixed-term or agency work, are influenced not only by labor regulation but also other areas of law and the position of firms in the value chain. Collective labor law and trade union power influence pay differentials and compliance with individual labor law.

A04 analyzed the globality of social policies by tracking the introduction of healthcare systems over time and across the globe, with early adopters primarily in Europe and South America and the last wave following decolonization struggles in Africa (Polte et al., **2023**). The project's research highlighted the institutional variety of healthcare systems, both in terms of generosity—i.e., the inclusiveness of healthcare systems (HCS) and the scope of benefits they provide—and variance in system types. Healthcare systems were classified on the basis of dominant actors in governance, financing, and service provision at introduction and today (Schmid et al., **2024**). A historical comparison revealed the growing importance of the state in all dimensions. Regarding HCS generosity, A04 identified and processed about 10,000 legal texts. Using keyword search and trained-language models, A04 manually annotated relevant texts to produce a unique dataset of qualitative generosity information. The established indicators and system type information is available in WeSIS, providing details on inclusiveness (who is entitled), benefit scope, and copayments or free access to care (de Carvalho et al., **2023**). A04 also aggregated five key numeric variables to measure generosity: healthcare coverage principle and entitlement, percentage of the population covered under public responsibility, public and mandatory private health spending, physicians per 10,000 population, and hospital beds per 10,000 population (see Figure 2). Together, the data collected in A04 speak to the global promise of universal health coverage in UN Sustainable

Development Goal 3.8. Beyond the quantitative perspective, A04 researchers produced 30 country reports on the current state and historical development of healthcare systems in the Global South (e.g., Götsch et al., **2024**; Truong & Schmid, **2023**). A04 also conducted case studies on colonial legacies in healthcare system developments in Kenya and Nigeria, exploring striking differences in post-independence trajectories despite a shared British colonial past, thus shedding light on social policy transformation in the Global South.

A05 investigated the globality of social policies by focusing on public education. The analyses included the primary and secondary school level, vocational training, and tertiary education (Besche-Truthe et al., **2024**). Part of the political promises of IO education policy recommendations is inclusiveness, namely the extension of public education to groups of people who differ according to gender, religion, migration status, or ethnic origin. Scope of benefits refers to the duration and regulatory role of public education for the respective subgroups. The project collected data on inclusiveness and scope of benefits and explored the variety of social policies by analyzing which groups are distinguished in different public education systems. Special attention was given in A05 to whether education in the Global South contributes to "female agency". Regarding female education, qualitative document analysis found that the World Bank and the OECD shifted their focus towards human rights and social inclusion rather than employability and marketization of education. Using network diffusion models, the project showed how such policies diffused over countries. However, only girls and young women in Western industrialized countries seem to respond to this incentive by increasing their share in the secondary education system (Besche-Truthe et al., **2024**). Socialism indeed affected educational inclusiveness, but the effect of the political promise of inclusion was stronger for men than women. Furthermore, the impact of socialism seems to be much weaker than the effect of cultural spheres (Windzio et al., **2025**).

A06 examined three key forms of family policy—leave policies, child benefits, and childcare services—by collecting comprehensive indicators of inclusiveness and benefit scope. These indicators highlight the globality of family policies (e.g., all countries except the U.S. have adopted state-level maternity leave) but also reveal their variety. Nordic and Western European countries lead with universal, progressive policies, such as gender-neutral leave and extensive childcare support, reinforcing gender equality. In contrast, low- and middle-income countries struggle to implement comprehensive support measures, exacerbating inequalities between insiders and outsiders (Böger et al., **2025**). Global South countries have resisted international pressure to expand de jure and de facto family policy coverage, leaving informal sector workers significantly disadvantaged (Son, **2023**; Son, **2024b;** Son, **2025**). As a result, many families rely on kinship and community networks for childcare and other forms of support (Son et al., **2025**). Since the 2000s, cash transfer programs for low-income families have aimed to address extreme poverty and the care crisis but lack redistributive mechanisms to close the insider-outsider gap (Böger et al., **2025**). Project A06 underscored female agency's pivotal role in shaping variety in family policy development. In both the Global North and the Global South, early family policy legislation failed to integrate large populations. For instance, the first paid maternity leave covered only factory workers, a minority of female workers. Over time, however, these inadequacies were primarily addressed in the Global North, as female political actors, particularly parliamentarians, consistently advocated for policies supporting women's paid and unpaid labor (Son, **2024a, 2024c**).

A07 analyzed the scope of benefits and inclusiveness of long-term care (LTC) systems and the role of international interdependencies in shaping LTC policies. Building on the two-dimensional conceptualization of generosity developed in the CRC (de Carvalho et al., **2024**), the project created a framework comprising 17 types of LTC benefits for persons in need of LTC and informal caregivers as well as the respective inclusiveness criteria. While the global spread of LTC systems has substantially increased in the last decades, our dataset shows that most LTC systems are highly varied and fragmented: They offer multiple in-kind benefit types and, less so, cash and regulatory benefits, which apply a variety of different eligibility criteria. To create comparable information on who receives which LTC benefits across countries, A07 designed a vignette study in which LTC assessors evaluate potential recipients. This study contributes a novel methodological innovation in comparative LTC and social policy research. Investigating international interdependencies, the project conducted case studies on Uruguay, Chile, South Korea, Taiwan, and several International Organizations (IOs). Joint research with project A04 found that IOs make diverging proposals regarding inclusiveness in healthcare and LTC (Sternkopf et al., **2024**). In Latin America, LTC is

embedded in discourses on informal caregiving and gender equality, linking it to childcare, in contrast to East Asia (Sternkopf, **2024**). In South Korea and Taiwan, discourse on aging and international learning, especially from former colonial power Japan, shaped LTC policy (Yun & Kim, **2023**). However, pre-existing policies on care migration led to divergent LTC insurance paths, highlighting that political stabilization in aging societies can take many pathways.

Project area B. This research area has been characterized by in-depth studies on subsets of social protection policies worldwide, focusing on specific policy fields at the core of the welfare state. The projects' shared analytical goal was explaining the development of welfare state generosity in terms of the scope of benefits (the material dimension of generosity) and inclusiveness (the personal dimension of generosity), following the CRC's core conceptual framework (de Carvalho et al., **2024**). Empirically, B projects cover all major regions of the world (Sub-Saharan Africa in B09, Eastern Europe and Central Asia in B06, Asia in B05, Latin and North America in B11, Western Europe in B01), including globally comparative studies (B01, B04, B10, and B12). Methodologically, projects in area B pursued comparative case study research, small-N comparisons, and quantitative analyses covering large-N studies of countries over time. Analytically, projects continued to examine national and international/transnational interdependencies such as war and conflict, economic crises, pandemics (as a reaction to the health crisis that unfolded in 2020), migration, the role of international organizations, and the transnational flow of ideas, building upon previous works pursued during the first period of the CRC.

B01 studied (de jure) inclusion in social security systems from a long-term historical perspective. The project scrutinized the integration process of old-age protection and unemployment insurance systems for 20 selected countries from the Global North and the Global South from 1880 to the present. Relying on country experts, the project compiled a database (GIST) that analyzes the inclusion of social groups in social security systems based on legislative development. The project investigated the temporal order of inclusion, the occurrence of exclusions, the definition of social groups that are included, and the legitimation of the inclusion of groups using arguments of political cohesion (Kuhlmann & Nullmeier, **2022**). B01 found ever-advancing processes of inclusion. De lege exclusions of previously included groups are rare; they are associated with situations of political instability (Öktem, **2024**). To account for the variety of social policies, the project developed a category scheme that recognizes nine main dimensions of social categorization: employment; age and life course; gender; household and family; need; merit, burden and behavior; place of residence; religion, ethnicity, caste, race and citizenship; and migration. With this scheme, B01 revealed that group constructions are not shaped by employment and occupation alone. Instead, multidimensional group constructions dominate. Purely employment-based inclusions have been exhausted in the last 40 years. Legitimation has shifted from economic to societal issues and (anti-)discrimination questions. Finally, B01 found that patterns of inclusion in the Global North and the Global South are largely similar; specific characteristics arise from the point in time and the extent to which agriculture was included.

B04 developed a multidimensional index on immigrant social rights (ISR), covering 45 countries from 1980 to 2021. Conceptually, this dataset goes beyond existing ISR measures by employing an original three-dimensional framework. This framework distinguishes between (1) legal categories of immigrants, (2) five types of welfare benefits, and (3) direct versus indirect forms of exclusion. Based on this innovative conceptualization, the dataset—available through WeSIS (embargo until 06/2025)— provides a comprehensive overview of ISR developments over time and across countries and regions. The findings attest to the globality of ISR: in most examined countries, non-citizens are granted an— often limited—set of social rights. On closer examination, however, variety dominates. Significant differences exist between regions, legal categories of immigrants, and types of benefits. Furthermore, there is evidence of convergence: while immigrant rights remain more inclusive in the Global North than in the Global South, the North has experienced greater retrenchment whereas the South has seen more expansion (Römer et al., **2024**). The dataset allows us to explain both globality and variety. In several publications, the project analyzed the role of party politics. Findings show that populist radical right parties systematically drive the restriction of rights (Römer et al., **2022**). Social Democratic parties, on the other hand, exhibit an ambiguous and context-dependent approach: they tend to drive exclusion when unemployment is high but support inclusion when other left-wing parties are influential (Harris & Römer, **2022**). Additionally, B04 identified civil society organizations (CSOs) as key drivers of inclusion

across a global sample of democracies and autocracies (Henninger et al., **2025**). Comparative case studies further revealed differences in CSO strategies across different democratic systems (Junge, **2025**).

B05 examined the massive but uneven expansion of social insurance and higher education in 21st-century China. In absolute terms, pension and health insurance inclusiveness has increased significantly. In relative terms, however, China's welfare regime is highly dualized. Regarding the scope of benefits, B05 found massive gaps in pension insurance between the relatively generous urban employee insurance and the rudimentary benefits of the resident insurance for most of the population (London & ten Brink, **2025**). In employee health insurance, Müller and ten Brink (**2023**) find evidence of a complex trade-off between cost control and the scope of benefits. The expansion of higher vocational education has increased skill mismatches (Müller, **2024**). In maternity insurance, the scope of benefits has decreased with increasing inclusiveness. Nonetheless, significant gaps between de jure entitlements and de facto benefits jeopardize the government's promise of using maternity benefits as a solution to the fertility crisis. A common thread in our research has been identifying causal mechanisms contributing to welfare dualization. Moreover, B05 diversified its methodological portfolio as a reaction to the challenging research environment in China. Qualitative methods included case studies and process tracing. Quantitative methods included OLS regression and panel models to analyze large-scale surveys. Additionally, text mining and text classification via machine learning allowed the project to substantially increase the number of administrative documents used to analyze unemployment insurance (Müller et al., **2025**). Overall, the findings of B05 contribute to a better understanding of uneven social policy expansion under autocratic conditions.

B06 examined the impact of dramatically increasing state revenues caused by a natural resource boom on the generosity of public social policy in post-Soviet welfare systems. In order to link the topic to the inquiry of the globality of social policy, in a first step, the project compiled a global dataset to examine the impact of natural resource booms on social policy expansion worldwide (Heinrich & Pleines, **2025**). The results demonstrate that a resource boom usually causes a substantial increase in states' social expenditure, but this increase is not matched by improvements in socioeconomic indicators. This poor performance is caused by strategic misuse of the state budget for political co-optation and results from administrative corruption, inefficient implementation, and poor targeting. Accordingly, in countries experiencing a natural resource boom, the political promises of social policy mostly do not materialize. B06 followed up on these results with qualitative, in-depth studies focusing on the Soviet welfare system. A clear result is that there is no direct path dependency for the institutional design of social policies, as seen in the diverse developments across the countries of the region. The most lasting Soviet legacy is in public expectations of state-organized welfare, as the project team argues in several publications. This situation, again, turns the political promises of social policy into a heavy burden for policymakers. To broaden the examination of the impact of socialism on social policies in a global perspective, B06 organized an edited volume with colleagues from six other CRC projects and external experts (Heinrich et al., **2025**).

B09 addressed the promises and challenges of new social protection instruments for rural areas and populations in Africa since the 1990s. Given their low social protection rates in interregional comparison, African countries and their aspirations to overcome their strong urban bias in social policy making are central in newer global social policy debates (Devereux & Wolkenhauer, **2024**). B09 uncovered the globalized nature of new social protection schemes, as efforts to universalize existing policies are primarily driven by international organizations and donors to entice governments to increase spending to achieve higher levels of inclusiveness and coverage. This goes hand in hand with a social protection agenda mainly formulated in international spheres and reduces the policy space to new social cash transfers (Wolkenhauer, **2023a**). Despite this globalized agenda, and despite the structural similarity of the rural social question in the African countryside, the policy outcome has been quite diverse across African countries. To account for this variety, the project implemented a qualitative research design and conducted comparative case studies in Morocco, Zambia, Tunisia, Botswana, and Mozambique. It found that new ideas on social protection correspond with rural development ideas, according to which African land still offers sufficient potential for commercialization and expansion for agricultural usage (Wolkenhauer, **2024**). New ideas for social, agricultural, and land policy that could strengthen smallholder families financially, as was envisaged in the context of land reforms immediately after the independence of African states remain underdeveloped under these circumstances. The focus on productivist welfare dominates

international discourses to ensure food security and rural livelihood opportunities (Karadag, **2024**). At the same time, commercialization and intensification of agriculture go hand in hand with ongoing pressure to displace smallholder families, while governments did not always compensate for land loss and abandonment (Penteado et al., **2023**). Prominently, Morocco followed the international universalization trend, designing ambitious expansions in inclusiveness and benefits (health insurance and social assistance) and, with large rural development programs, weakening inter-national criticism of failing to achieve its goals. Conversely, expansion efforts in Zambia and Tunisia were linked to international incentives to reduce in-kind benefits for producers and consumers to create fiscal space for new cash transfers. Botswana's conservative welfare state remained stable and uninterested in new monetary benefits, as did Mozambique, where a fierce conflict emerged between the World Food Program and the government. For all countries, however, the fundamental conflict over maximizing objectives remained. While there has been a visible political logic in expand-ing welfare state resources to politically stabilize and integrate the countryside, the monetary expansions alone failed to provide a meaningful structural solution to rural social issues (Wolken-hauer, **2023b**).

B10 examined the influence of interstate wars, civil wars, and the Cold War on the formation, inclusiveness, and scope of social benefits at the global level using both quantitative and qualitative methods. Covering the period from the First World War to the present (e.g., the war in Ukraine), the findings indicate that large-scale interstate conflicts have spurred the development and expansion of the welfare state. Both world wars were pivotal in establishing specialized national welfare ministries (Petersen et al., **2023**), introducing and universalizing social policies (Obinger & Schmitt, **2024**), and promoting the rise of tax states (Frizell, **2024**). Moreover, these wars influenced social policy in the Global South, accelerating the international diffusion of social rights and programs (Schmitt & Shriwise, **2024**). The effects of civil wars—especially prevalent in the Global South after 1945—are more nuanced. While such conflicts have immediate negative impacts on social policies and outcomes, post-conflict periods often see an increase in welfare legislation. Nevertheless, long-term coverage of formal social protection programs frequently falls short, partly due to weakened state institutions resulting from war (Frizell et al., **2025**). During the Cold War, bipolar regime competi-tion spurred welfare state expansion in the Global North to reinforce legitimacy and stability on both sides of the Iron Curtain (Obinger, **2025**).

B11 studied the interplay between the welfare state and protectionism in Argentina and the United States. It focused on the historical development of social policy and protectionism as interrelated instruments modern societies used to protect themselves against unbridled markets. Covering the late 19th century to the present, it paid particular attention on two periods of heightened economic pressure: the interwar years, particularly the Great Depression, and the global economic upheavals following the 1973 oil crisis (Torp, **2024b**). In both Argentina and the US, B11 identified interactions between social policy and protectionism in various constellations. In the early phase, social security measures in both countries relied on customs revenues. In the US, surplus tariff revenues funded federal welfare benefits for Union veterans. In Argentina, a direct connection between social and trade policy was detected in the context of the sugar industry, for which politicians in the province of Jujuy demanded protection from foreign competition to finance social policy measures. By the 20th century, both nations introduced programs to aid workers in import-sensitive industries affected by trade liberalization. The project also found that in Argentina, protective tariffs enabled the emergence of industries, creating a workforce that became central to the social security system and Perón's political base (1946–1955). Less direct connections between trade and social policy emerged in the US in the 1990s where a strong ideological link between the two could be traced in campaign materials and political debates (Müller, **2025**). The project further discovered that demands for compliance with social standards functioned as a protectionist measure against imports from low-wage countries.

B12 addressed IOs' responses to the global and regional consequences of the COVID-19 pandemic. Specifically, B12 explored the conceptualizations of inclusiveness and scope of benefits contained in IOs' responses to the pandemic in health policy, labor market policy, and social protection policy. Overall, the project observed high consistency in IOs' ideas and recommendations during the COVID-19 pandemic (Berten et al., **2024**), with IOs displaying path dependency despite this global crisis. Regarding inclusiveness and scope of benefits, for example, the WHO called for protecting healthcare workers' rights (work safety, pay, and social protection) and promoted the inclusion of vulnerable groups in both short-term and long-term responses. The ILO retained its focus

on social protection and labor, highlighting the dire situation of informal workers and other vulnerable groups. The World Bank focused on the most vulnerable groups (youth, the elderly, women, and other social and ethnic groups), while strengthening support for informal workers and migrants. Unsurprisingly, the OECD primarily focused on vulnerable groups in its industrialized member states, particularly those with weak ties to the labor market: women, children, and young people, who had been identified as the target group for inclusiveness before the pandemic. However, regional IOs' positions on inclusiveness and scope of benefits diverged from those propagated by global IOs, as the regional IOs considered the specificities of their region. ASEAN's policies predominantly addressed migrants, workers in informal sectors, women, children, and youth—which the African Union also addressed—and additionally included refugee returnees; CARICOM focused on healthcare workers, older adults, and people living with disabilities.

Projects in research area B not only traced the causal mechanisms behind generosity development and the expansion of benefits and inclusiveness but also collected extensive data, mostly available in WeSIS. B01 collected the GIST data based on country-expert information on including social groups in the social security systems based on legislative development. B04 compiled a multidimensional index on immigrant social rights covering 46 countries (data embargo until June 2025). Data on generosity in post-Soviet welfare regimes and data on natural resources were compiled in an original global dataset by B06, while B05 collected administrative documents on unemployment insurance in China, using machine learning techniques to quantify the text. Data collected in the B area projects address specific questions of welfare generosity development, which go beyond the data compiled in area A on the key fields of social policy and education, such as the dataset on immigrant social rights. Other datasets collected in the B area make use of alternative forms of data, such as the collection of administrative text data from China, which allow more profound insights into the causal mechanisms that led to extension or retrenchment in the scope of benefits or inclusiveness over time, for specific regions or small-N comparisons.

Figure 4. *Distribution of CRC phase II peer-reviewed journal publications (January 2022–February 2025) by recent impact factor (a) and 5-year impact factor (b)*
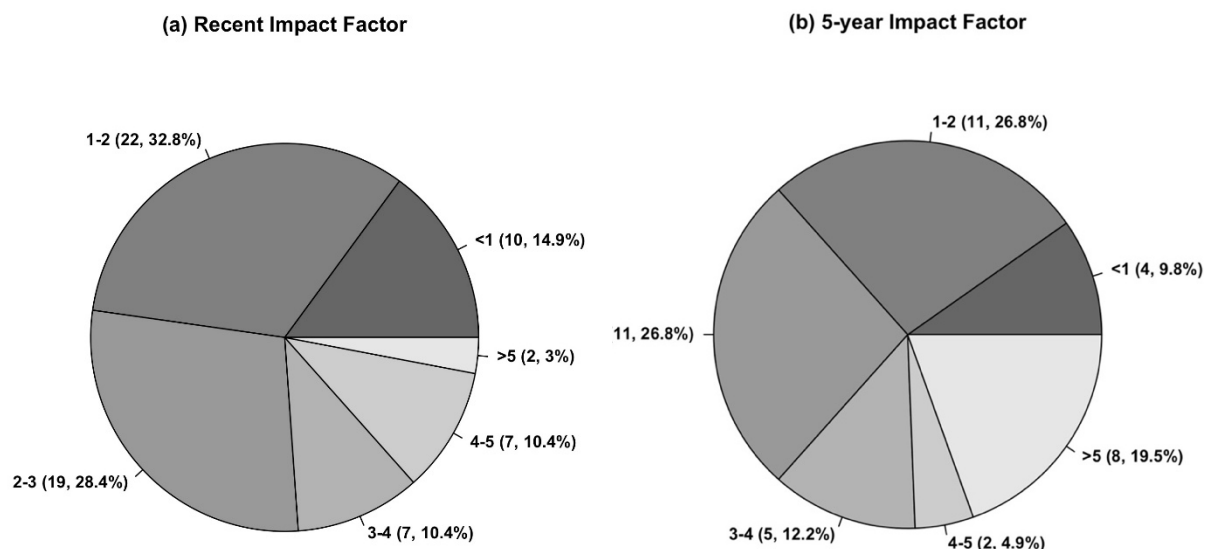
Note: Panel (a) use the journal's most recent impact factor (N=67). Numbers in parentheses refer to absolute values followed by the share in percent. Panel (b) uses the journal's 5-year impact factor (N=41).

Publications. As Phase II of the CRC started with extensive data collection efforts, publications based on the analysis of the rich empirical work are naturally still ongoing at this stage. However, since the beginning of Phase II, CRC researchers have published their results in more than 70 articles in international peer-reviewed journals. 28% of these were authored exclusively by women (either as single or co-authors), and 31% were by male author teams or single authors. In total, female authors are involved in 49% of the journal publications, which is a strong outcome and generally maps the CRC's gender ratio. The CRC produced 13 monographs and a large number of contributions in edited volumes, policy briefs, and other types of publications. Journal publications comprise 29% of the

overall output, monographs 5%. Among the international peer-reviewed journal publications are a range of key field journals such as *Social Policy & Administration* (e.g., Römer et al. **2024**; Breznau, **2025**; recent impact factor 2.3), *Global Social Policy* (5-year impact factor 1.4), *Journal of Social Policy* (5-year impact factor 2.5), or *International Labor Review* (recent impact factor 2.8). These have a substantial reach within the specific scientific audience working on related topics, but also among policymakers, and hence, have high visibility and contribute to international scholarly research at a high rate. The extensive contributions to high-rank field journals are the backbone of the CRC 1342, as exchange with the scientific community and policymakers working on these topics are vital for our research findings to impact future research and public policies. More than 60% of current publications appear in journals with a medium-level impact factor (between 1–3, see Figure 4).

In addition to our emphasis on field journals, results from the CRC have also been published in prestigious general audience journals such as the *European Journal of Political Research* (recent impact factor 3.6; e.g., Harris & Römer, **2022**), which have a broad brief. Notably, several studies have been published in top journals of their (respective) discipline, underlining the novelty and importance of the theoretical and empirical contributions developed in the CRC 1342. Only 35% of these have exclusively male authors, and 65% feature at least one female co-author (29% have exclusively female authorships). Nils Düpont (INF) and co-authors Saskia Ruth and Nina Wiesehomeier's contribution was published in the flagship outlet *American Journal of Political Science* (**2024**; impact factor in 2023 5.0, 5-year impact factor 7.1). Analyzing the diffusion of populism across political parties, the study sheds light on how policy ideas and public policies are shaped by cross-national linkages and "cultural spheres," a concept introduced by project A05 (e.g., Windzio et al. **2022**). The single-author publication by Jakob Frizell in *Comparative Political Studies* (**2024**; recent impact factor 4.2, 5-year impact factor 5.5) investigates the implications of war taxes for national tax systems and fiscal capacity based on tax data collected in B10 covering 1960–2020. B10 also published in further renowned journals. A paper by Herbert Obinger and Carina Schmitt on the impact of war on introducing family allowances was published in the *Journal of Public Policy* (**2024**, impact factor 2.4), while an article by Jakob Frizell, Victoriia Muliavka, Herbert Obinger, and Carina Schmitt on the impact of war on welfare attitudes in Ukraine was published in the *Journal of European Public Policy* (**2025**, impact factor 4.6, 5-year impact factor 5.5). An article by Römer et al. (**2022**) on the impact of right-wing political parties on immigrant welfare rights using the unique data collected in B04 also appeared in the *Journal of European Public Policy*. In total, 13% of publications from phase II appear in top journals with an impact factor of 4 and above. As the current CRC period is still ongoing, further publications in high-rank outlets are expected over the coming months and years.

The second phase also witnessed productive cooperation across projects that was published in edited volumes and special issues. Projects A06, B04, B06, and B10 contributed to *The Oxford Handbook of Social Policies in the Global South* (**2025**), which was accepted for publication by the highly distinguished publisher Oxford University Press. The handbook consists of 46 chapters, which provide a novel and thorough overview of social policy development in the Global South. The handbook is edited by Herbert Obinger and Carina Schmitt (B10) in collaboration with former CRC Mercator Fellow Armando Barrientos, as well as Matthew Carnes, Huck-ju Kwon, and Leila Patel. Furthermore, seven CRC projects contributed to an anthology on *The Generosity of Social Policies in Socialist and Post-socialist States* at Palgrave Macmillan (**2025**). The book, edited by Andreas Heinrich, Ewa Kaminska-Visser, Heiko Pleines, and Tobias ten Brink, explores socialist and post-socialist approaches to social policy, their implementation, and outcomes across different world regions. An important conclusion from the joint publication is identifying a multiple-cause explanatory framework. Welfare generosity in this regional context needs to be explained by more than regime type or socialist ideology. The low level of socioeconomic development, weak state capacity, pre-socialist legacies, cultural influences, and inter- and transnational interdependencies, such as geopolitical system competition during the Cold War, are equally decisive.

Research program for the third phase

Building on the findings and achievements of the previous two phases, the research program for the third phase is derived in three steps: First, we define the overarching puzzle and guiding research question. Then, we define key conceptual terms and present a stylized explanatory framework for

studying the impact of social policies globally. Next, we present the methodological approaches to be utilized in the third phase before concluding with a summary of the individual projects.

Guiding research questions. The first two phases of the CRC 1342 "Global Dynamics of Social Policy" produced three fundamental insights: First, the **globality** of social policies (Windzio et al., **2022**). Despite differences in the sequence of their emergence, the inclusiveness of programs, and the scope of benefits, virtually all states worldwide have, or at least claim to have, social policy programs. Second, the institutional **variety** of social policies (Barrientos et al., **2025**). The variety in state social policy became apparent only by broadening the perspective to include the Global South and by systematically collecting data. The conventional classifications used to analyze the impact of social policy in Western welfare states—such as the three worlds of welfare capitalism or the varieties of capitalism approach—are insufficient to capture this diversity (Böger & Öktem, **2019**). Thirdly, it was observed that a constant feature of the establishment and expansion of the welfare state was that they were accompanied by the **promise** to cushion socioeconomic conflicts and to bind citizens to the political system (Heinrich et al., **2025**).

Given the present situation, these are theoretically and empirically puzzling results. Compared to previous decades, the established Western welfare states today face unprecedented challenges. In many countries, socioeconomic conflicts and political polarization appear more prevalent than ever since the end of the Cold War (Lührmann & Lindberg, 2019). The model of democratic governance and free markets, more or less cushioned by social policies, which for years was seen as a guarantor of prosperity and political stability, is under pressure from within and outside the nation-state. At the same time, the costs of rearmament, climate change, and protectionism have the potential to severely constrain welfare state spending. In light of the promises which accompanied the establishment of the welfare state, the changed political conditions in a multipolar world, the widening cleavages within national societies, and the global triumph of political populism make a compelling case for reconsidering social policy's socioeconomic and political impacts (Busemeyer et al., 2022a). Against the backdrop of these fundamental social, economic, and political shifts, the two key questions of the third phase are: **Why has the global diffusion and expansion of social policy resulted in greater socioeconomic effectiveness in some regions at some times compared to others? Why has it fostered stronger political integration in certain parts of the world while failing to do so elsewhere?** When has the welfare state kept the promise of mitigating socioeconomic conflicts, and when have its social policies proved ineffective? When has the welfare state managed to tie individuals and groups to the political system, and when did it fail at political integration?

To address these questions, the third phase starts from the premise that the historical sequence of the introduction (CRC Phase I) as well as the inclusiveness, and the scope of benefits of social policy programs (CRC Phase II) are key determinants shaping social programs' ability to mitigate socioeconomic conflicts over time and across classes (**socioeconomic effectiveness**) and to tie individuals and groups to the political system (**political integration**). In this respect, the conceptually dependent variables of the first two funding periods—the historical development, inclusiveness, and scope of social policy—become conceptually independent variables. The dependent variables in the third phase are located on two dimensions: **socioeconomic** and **political outcomes** (Figure 5). The socioeconomic outcome dimension reflects material effects such as the allocation of resources (e.g., income, services), distributive outcomes (poverty, inequality), and individual responses to these outcomes, such as crime and life satisfaction. Other socioeconomic outcomes include social policy impacts on economic performance regarding employment, economic growth, or public debt. The political outcome dimension reflects the effects of social policies on citizens' support for and demands on the political system and on power relations within that system. Citizens' support and demands refer to political attitudes and behavior, ranging from protests, concrete preferences for social programs and redistribution to political participation and support for the political system. Power relations refer to the emergence and relative strength of collective actors (e.g., trade unions, NGOs, social movements, and political parties), the level of conflict between them, and the impact of social policy on the stability and legitimacy of political systems.

Figure 5. Stylized explanatory framework
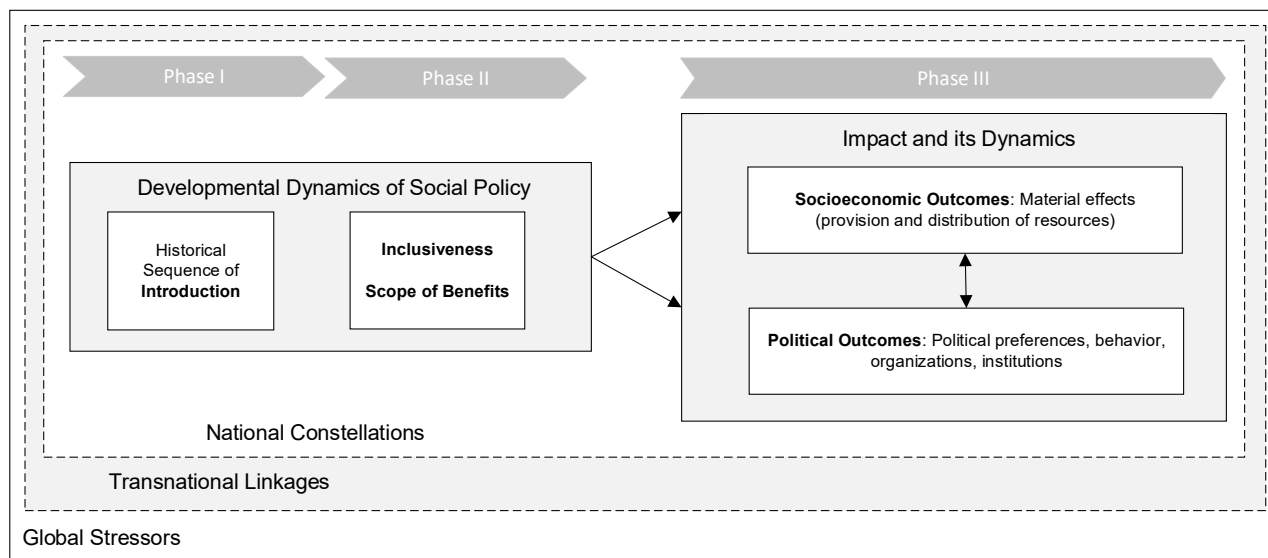
Stylized explanatory framework: The welfare state's introduction and expansion are closely linked to the promise to mitigate socioeconomic conflicts over time as well as across classes and to bind individuals and groups to the political system (Béland et al., 2021). Thus, it is conceptually crucial to distinguish the pathways through which welfare state programs affect socioeconomic and political outcomes. First, **socioeconomic effectiveness** refers to the extent to which welfare policy influences socioeconomic outcomes in ways that mitigate or pacify social conflict or improve the social lot of vulnerable groups. It refers to the degree to which a policy achieves its intended economic and social outcomes ("Does it work?"). A related question is whether the policy works at the lowest possible cost. This is the question of social policy efficiency, which is the relationship between achieving goals while minimizing costs and preventing the waste of resources. A policy may be effective but inefficient (it works but is costly) or efficient but ineffective (it saves costs but does not achieve its goals). Whether and, if so, how much emphasis is placed on efficiency in assessing the effectiveness of welfare state policies can vary widely. Socioeconomic effectiveness highlights the linkage between welfare programs and social policy goals. Although social policy goals vary across time, welfare states, and regions, they are not arbitrary. All welfare states decide whether and how to insure against general life risks. Today, the Sustainable Development Goals (SDGs) also show an emerging global consensus that government action in general, and welfare state policies in particular (International Labour Office 2024), should improve people's lives and create more equitable and sustainable societies.

Second, **political integration** refers to the ability of social policy to promote political cohesion and systemic stability (Taylor-Gooby, 2008; Bueno de Mesquita et al., 2003). It traces how social policies help promote normative support for the political system that produced or claims to have produced those policies. The problem of political integration addresses whether and how the welfare state generates support for its institutions and political actors. This support may manifest itself at the macro-level in terms of system stability and the survival of political institutions or at the micro-level in terms of political participation and the recognition of political actors and representatives. Such a perspective assumes that welfare states have the capacity to address these issues. However, the link may be less clear if the challenges are beyond the state's capacity.

Although **political integration** is often seen as a natural consequence of **socioeconomic effectiveness**, a central assumption of the CRC's analytical framework is that the two phenomena are essentially independent. First, the emergence and expansion of the welfare state can occur without effectively mitigating social conflicts, yet it still serves to bind people to the political system. Second, expanding the welfare state without a corresponding extension of political rights may face limitations. If the gap between social and political rights becomes too wide, a rupture in the system is likely to occur. When and why will socioeconomic effectiveness go hand in hand with political integration? When will they diverge? Cross-tabulating the effectiveness and ineffectiveness of social policy on the one hand and the politically integrating and disintegrating effects on the other, we

distinguish four basic combinations of socioeconomic and political outcomes (Table 2). The table serves as a conceptual and empirical reference point for the research agenda of the third phase of CRC 1342. By the end of the third phase, the objective is to understand why welfare policies lead to which combinations of socioeconomic effectiveness and political integration.

Table 2. *Socioeconomic effectiveness and political integration*

		Socioeconomically	
		Effective	**Ineffective**
Politically	**Integrative**	Political integration and welfare system effectiveness	Political integration despite welfare system ineffectiveness
	Disintegrative	Political disintegration despite welfare system effectiveness	Political disintegration and welfare system ineffectiveness

A central premise of the first two phases of the CRC 1342 was that the dynamics and patterns of national social policies are shaped by the interplay of horizontal linkages between states and societies, vertical interdependencies between states and other social policy actors, and the respective national constellations in politics, society, and the economy. The impact analysis in the third phase will continue to be based on this premise, as the impact dynamics are embedded in national constellations, transnational linkages, and global stressors. Thus, social policies' ability to deliver socioeconomic effectiveness and political integration is expected to depend on national constellations and transnational linkages.

National constellations refer to actor constellations in a specific policy field and a particular country's overall political, institutional, economic, and cultural framework. Social policy's political and socioeconomic effectiveness depends on effective law enforcement, conditioned by state capacities, the political regime type, and the quality of institutions (Rothstein, 2011; Acemoglu & Robinson, 2019). Corruption, political clientelism, and a lack of administrative capacity likely impede or distort the implementation of welfare legislation. Political clientelism may lead to a mistargeting of welfare benefits if resources are diverted opportunistically to secure the re-election of incumbents. Corruption also contributes to the mistargeting of welfare benefits if welfare funds are redirected to local elites or groups crucial for regime survival. Moreover, corruption is more frequent in biased tax systems that benefit the wealthy and thus have a significant impact on inequality. A lack of bureaucratic capacities hampers effective policy implementation and limits the critical evaluation of existing social policies. Economic factors also play a crucial role in explaining social policy outcomes. GDP growth and public debt determine the resources available for social spending, while a large informal sector likely constrains access to benefits.

Transnational linkages refer to horizontal linkages between states or societies or vertical linkages between states and international organizations. These linkages include information flows, political-organizational integration (e.g., through membership in international organizations), migration flows, and economic relations (Windzio et al., **2022**). The nature and density of these networks of interdependence, combined with national political, social, and economic constellations, shape the dynamics and patterns of national social policies. These transnational linkages structured our investigations of the developmental dynamics of social policy in terms of the introduction and design, inclusiveness, and scope of social policy programs. The analysis of transnational linkages proved its worth in the first and second phases of the CRC's research and will be used again in the third phase to understand the causal pathway through which social policy affects socioeconomic and political outcomes.

Global stressors are systemic challenges or pressures that disrupt global stability, cooperation, or governance, including climate change, economic crises, pandemics, terrorism, resource scarcity, and geopolitical conflicts. These stressors transcend national boundaries, requiring collective action and policy responses to mitigate widespread impacts. Global stressors may be exogenous disturbances that shape sociopolitical outcomes but can also stem from endogenous welfare state dynamics. Demographic change, for instance, is a stressor partly linked to the welfare state itself. Global challenges range from foreseeable long-term issues to sudden emergencies or "black swans"

(Castles, 2010). Both types affect multiple countries simultaneously, crossing geographical and functional boundaries (Boin & Rhinhard, 2008). Black swans are unexpected crises with significant global consequences, such as the 2007 financial crisis, the COVID-19 pandemic, and natural disasters like earthquakes and floods (Castles, 2010). Such events create a massive demand for social protection, conceptualized as "shocks to risk pools" (Rehm, 2016). Both sudden crises and long-term challenges are marked by uncertainty, urgency, and threat (Boin & 'tHart, 2007).

Other long-term global challenges that can escalate into disruptions and mediate social policy impacts may include climate change, technological and economic shifts, migration, and population aging. Climate change affects social policies through economic losses from extreme weather, health system strain from rising temperatures, and mass migration due to rising sea levels and desertification. These events disproportionately impact vulnerable populations, creating new inequalities and needs while resources for social policies decline. Technological change, including digitalization, automation, and AI, rapidly transforms economies (Iversen & Soskice, 2019). While increasing productivity, technological change also causes job losses in routine and analytical sectors, leading to inequalities (Frey & Osborne, 2017; Cazzaniga et al., 2024). Scholars have begun examining these challenges for Western welfare states (Johnson & Acemoglu, 2023; Acemoglu & Restrepo, 2020; Busemeyer et al., 2022b). Demographic change, marked by aging populations, lower fertility rates, and shrinking workforces, poses challenges for social policies. Aging increases health and pension expenditures while shrinking labor forces, as seen in China and South Korea, threatening economic growth and public revenues (OECD, 2023). Migration driven by demographic imbalances, such as youth bulges in the Global South, exacerbates brain drain. Demographic shifts influence political outcomes, with aging populations potentially increasing generational conflicts and imbalanced gender ratios threatening stability.

Outcome dimensions. Based on the stylized explanatory framework, the two outcome dimensions are operationalized as follows (Table 3). **Socioeconomic Outcomes**: The impact of social policies on socioeconomic outcomes can be examined from a macro-comparative perspective (world regions, states, cities) and a micro-perspective (at the individual level). From a **macro-comparative perspective**, the questions are, for example, how does the specific design of social policies in terms of generosity and coverage and their resources (program-related spending) influence elementary social indicators such as birth rate, life expectancy, or combined welfare indicators (e.g., Human Development Index)? What contribution does social policy make to combating poverty and inequality, and what is its impact on economic growth? What types of programs and financing modes lead to successful social and educational policy performance, and what resources are required? To what extent does the effectiveness of national social policies depend on international welfare provision (e.g., development aid, remittances, donations, etc.)? From a **micro-comparative perspective**, this outcome dimension explores how social policies influence life choices and behavior. What influence do specific social policies have on individual decisions? How do they affect educational choices, family planning, migration, decisions to enter and leave the workforce, health behavior, or general life satisfaction? While some of these questions have been theorized and tested at length in the context of advanced contemporary Western democracies (e.g., Rueda & Stegmueller, 2019; Garritzmann et al., 2022 for social investment policies), the CRC 1342 has the expertise, data (e.g., WeSIS), and human resources to examine the impact of social policies on socioeconomic outcomes from a genuinely global and historical perspective.

Table 3. *Outcome dimensions (operationalization of selected dependent variables)*

Dimension	Macro	Micro
Socioeconomic	Poverty rate, inequality, employment, economic growth, birth rate, life expectancy, morbidity, Human Development Index, migration, illiteracy	Labor force participation, social mobility, occupational attainment, life satisfaction, family formation; taking up employment or assuming family care responsibilities
Political	Political parties, interest organizations, stability and legitimacy of government, red tape, strikes, (de-)polarization	Political participation, solidarity, voting behavior, attitudes and behavior towards the political system (e.g., support, protests, violence)

Political Outcomes: Second, the effects of social policies and welfare states on political outcomes will be examined. This impact of social policy can again be addressed from a macro- and a micro-comparative perspective, although the distinction becomes less sharp. From a **macro-comparative perspective**, we examine how social policies affect political systems' stability. What legitimation, integration, and stabilization effects does social policy have, under what conditions does it contribute to political polarization, protests, and violence, and what are the consequences of instrumentalizing social policy to secure power? Does social policy, or a lack thereof, trigger the emergence of social movements and shifts in the party system, such as the emergence of populist or anti-system parties? Does it lead to a surge in bureaucratization, and how does it shape social movements or political discourses? Does it help or hinder international cooperation and exchange? Another question concerns whether social policies generate new welfare classes (*Versorgungklassen*). This idea, first conceptualized and studied by Lepsius (1979), suggests that social policies create new inequalities between privileged and underprivileged welfare recipients, which may contribute to political polarization and shape political preferences (also see Rueda 2014 on dualization, Tepe & Vanhuysse, 2009, 2010). While this specific impact of social policies has already been addressed for contemporary Western democracies, little is known about its validity from a global or historical perspective. From a **micro-comparative perspective**, we will ask how social policies shape citizens' political attitudes and behavior. The idea that social policies influence individual political behavior and attitudes is a premise of policy feedback research (Pierson, 1993; Svallfors, 2006). Existing research has, for example, examined the effects of welfare policy on party preferences, electoral competition (e.g., Giger, 2012), political participation (e.g., Larsen, 2019), and populist attitudes (e.g., Busemeyer et al., 2022a). How does social policy relate to political integration, for instance with respect to cohesion and polarization? The CRC 1342 will address these questions on how social policies affect macro- and micro-political outcomes from a global and comparative perspective.

Literature review: Fundamental theoretical references

Although much of the existing comparative welfare state research is concerned with the effects of socioeconomic and political factors on the emergence, expansion, and dismantling of welfare state policies rather than the impact of social policy on socioeconomic and political outcomes, there is nonetheless an extensive literature, mostly focused either on OECD countries or individual countries in the Global South. The aim of the following review is not to provide a detailed account of the effects of social policy on these various dependent variables (e.g., economic growth, fertility, or voting behavior). Instead, this section presents the broader theoretical frameworks the third phase seeks to contribute to according to the two outcome dimensions. The extensive welfare regime literature will be addressed in assessing social policies' impact on socioeconomic outcomes, while policy feedback models will be considered in regard to political outcomes. Each of the 12 research projects will provide a focused literature review based on the project-specific research question and hypothesis.

Welfare regimes. Scholars in comparative welfare state research have developed various typologies classifying institutional differences and complementarities in order to understand cross-national variations in welfare state policies and their socioeconomic outcomes. Two of the most prominent frameworks in this endeavor are Gøsta Esping-Andersen's *The Three Worlds of Welfare Capitalism* (1990) and the *Varieties of Capitalism* (VoC) concept by Peter Hall and David Soskice (2001). While both have been highly influential, they are limited in their ability to analyze social policies and their outcomes in the Global South (Abu Sharkh & Gough, 2010; Böger & Öktem, 2019; Yörük et al. 2022). The three worlds of welfare capitalism—liberal, conservative-corporatist, and social democratic—refer to advanced industrial economies, overlooking developing countries' institutional and socioeconomic realities. One of the major limitations is that the three worlds typology assumes a strong, formal labor market and institutionalized welfare systems, conditions that do not characterize many economies in the Global South (Gough et al., 2004). Informal employment is prevalent in developing countries, and social policies often rely on community-based, donor-driven, or hybrid systems rather than state-led welfare provision (Barrientos, 2011). The VoC framework provides another valuable lens for understanding the relationship between economic structures, labor markets, and welfare states (Tepe et al., 2010). However, like the three worlds typology, VoC is ill-suited for analyzing social policies and their outcomes in the Global South. A major limitation is that VoC assumes stable political institutions and well-developed capital markets (Schneider, 2013).

Many developing economies are characterized by large informal sectors, which are characterized by firms and workers operating outside formal regulatory and social protection systems (Gough et al., 2004; Huber & Stephens, 2012). Unlike Liberal Market Economies (LME) and Coordinated Market Economies (CME), where firms play a key role in shaping welfare provision, many economies in the Global South rely on state-led or externally-funded social policies (Leisering, 2019). In addition, many welfare systems in the Global South are shaped by historical colonial legacies, political instability, and external influences, for example by international organizations (Seekings, 2008). These factors result in fragmented, unequal, and often means-tested social policies that do not fit neatly into Esping-Andersen's categories or VoC's binary distinction (Haggard & Kaufman, 2008). Welfare provision is often fragmented, with a mix of informal, state, and donor-driven safety nets (Rudra, 2007). Thus, while the three worlds and the VoC typology help understand advanced industrialized economies, they fail to capture the variety, complexity, and outcomes of social policy systems in the Global South, highlighting the need for alternative frameworks that consider informality, state capacity, and historical legacies.

The availability of WeSIS data offers a unique opportunity to address these challenges empirically. It enables the CRC to examine when and under what conditions welfare state configurations produce specific socioeconomic and political outcomes. This includes examining the role of national constellations, transnational linkages, and global stressors in shaping welfare effectiveness.

Policy feedbacks. Policy feedback theory serves as a second fundamental theoretical reference for the third phase, offering insights into how social policies influence both political attitudes and behavior (Busemeyer et al., 2021). Grounded in historical institutionalism (Thelen, 1999), this theory underscores that policies are not merely the products of political processes but also catalysts for political and social change (Pierson, 1993). Policy feedback operates through two main mechanisms: resource effects and interpretive effects (Mettler & Soss, 2004). Resource effects refer to the tangible benefits or burdens policies create, shaping access to healthcare, income security, and education (Korpi & Palme, 1998). Interpretive effects shape individuals' perceptions of the state, influencing political efficacy or alienation. Inclusive policies foster civic engagement while stigmatizing policies erode institutional trust (Soss, 1999).

Policy feedback effects are classified as positive or negative, depending on whether they reinforce or weaken policies over time. Positive feedback strengthens political support and institutional sustainability, stabilizing and expanding social programs. Beneficiary constituencies emerge as social policies create groups with vested interests, such as pensioners or unemployed workers, who mobilize politically to protect programs (Pierson, 1994; Béland, 2010). Institutional lock-in occurs as policies establish path dependencies, making them harder to dismantle. Administrative structures, legal frameworks, and prevailing social justice norms entrench programs, increasing reform costs (Mahoney, 2000; Torp, 2015). Public perceptions and trust also play a role, as inclusive policies build government trust and civic engagement. Universal programs like public education enhance perceptions of state legitimacy, fostering broad-based support for social spending (Mettler & Soss, 2004). Negative feedback weakens policies by generating opposition, eroding trust, or failing to meet goals, leading to stagnation, retrenchment, or redesign. Means-tested programs can stigmatize recipients, reducing political support through the social construction of target populations (Schneider & Ingram, 1993; Blum & Kuhlmann, 2025). Welfare programs perceived as benefiting "undeserving" groups often provoke a backlash, undermining their viability (Skocpol, 1991). Weak political mobilization makes programs with narrow or fragmented constituencies more vulnerable to retrenchment, as means-tested benefits lack strong defenders compared to universal programs (Korpi & Palme, 1998). Unintended consequences, such as inefficiencies or exacerbated inequalities, foster dissatisfaction. Poorly designed unemployment benefits may discourage labor participation, attracting criticism (Weaver, 2010). Erosion of fiscal sustainability also plays a role, as generous welfare policies can strain public finances, particularly during economic downturns. Perceived inefficiency can lead to austerity measures, weakening long-term support (Giger & Nelson, 2011).

While policy feedback theory provides valuable insights into how social policies shape political attitudes and behavior, it has limitations when utilized in contexts outside the OECD world. Feedback effects are often context dependent, influenced by political, cultural, and institutional factors, and may generate unintended consequences, such as exacerbating inequalities or entrenching

exclusionary practices (Campbell, 2012). The theory has been applied in the Global South to examine how social policies influence state legitimacy, citizen engagement, and welfare system trajectories. Conditional cash transfer programs like Mexico's Progresa/Oportunidades have increased beneficiaries' political participation and strengthened support for incumbent governments (De La O, 2013). In Brazil, Bolsa Família has entrenched social assistance within national policy, enjoying broad support due to its success in reducing poverty and inequality (Fenwick, 2009). These positive feedback effects contribute to policy stability and expansion, reinforcing the welfare state's societal role. Conversely, poorly designed or unevenly implemented policies can have negative effects. In Sub-Saharan Africa, inconsistent service delivery and perceptions of corruption have eroded trust in government institutions (Bratton, 2010). Targeted programs that exclude certain groups may deepen social divisions and reduce political participation among marginalized populations (Hickey, 2008). Exclusionary welfare systems correlate with labor informality and individual disenchantment with state-provided social protection (Berens, 2020; Holland, 2018). Vulnerable populations often remain skeptical of state welfare solutions (Altamirano et al., 2022). Thus, negative feedback can undermine state legitimacy and hinder the development of effective welfare systems.

Much of the empirical research on policy feedback has focused on OECD countries, leaving open the question of how applicable this approach is to the Global South. Existing studies primarily examine immediate programmatic support, often neglecting the broader question of when and under what conditions policy feedback influences support for political systems or fuels protest. To advance this debate, research must explore how national, transnational, and global stressors shape welfare policy outcomes and their political repercussions. A key unresolved issue remains: when does the promise of the welfare state, reflected in socioeconomic improvements, translate into political legitimacy? If welfare policies fail to generate sustained support, does this suggest Marshall's (1950) vision was flawed, or are welfare programs themselves ineffective in altering long-term socio-economic and political dynamics? Expanding policy feedback research beyond OECD contexts is crucial to answering these pressing questions.

Methodological approaches utilized in the third phase

Conceptualizing impacts. Since the introduction of welfare state programs, their impact has been debated (Castles, 2013). The CRC 1342 will add to this debate empirically by conducting systematic impact evaluations of social policies, especially in the Global South, looking beyond the national container of welfare policies. In methodological terms, the primary goal of the third funding phase is to examine the impact dynamics of social policy. We distinguish between substantive and dynamic effects (Table 4). The first perspective is to investigate whether social policy affects a particular outcome. If so, what is the size and direction of the influence? Does social policy reduce poverty? Does it affect economic growth negatively or positively? How strong are these effects? The second perspective focuses on impact dynamics. Temporal impact dynamics are concerned with the question of when the effect occurs. It refers to the temporal linkage between implementing a social policy and measuring an impact on socioeconomic and political outcomes. Both short-term and long-term effects are possible. Also, it is often interesting how these effects unfold (functional impact dynamics). Several patterns are conceivable. Higher levels of generosity, for example, could have a linear impact on socioeconomic outcome measures (more generous welfare benefits cause a proportional decrease in the poverty rate), while massive cutbacks of welfare benefits or a collapse of welfare systems may lead to an exponential increase in crime rates. The impact of the coverage of a social policy program on political outcomes, such as legitimacy beliefs, may instead follow a threshold function, which means that if coverage exceeds a certain level, it will spill over into political legitimacy beliefs. Regarding policy feedback, the functional form of social policy effects has been discussed (e.g., Busemeyer et al., 2021).

Table 4. *Impact and its dynamics*

		Characteristic		
Substantive	**Impact**	Yes vs. no (effect size)		
	Does it make a difference?	[e.g., non-directional hypothesis]		
	Impact direction	Positive vs. negative (effect size)		
	Difference in which direction?	[e.g., non-directional hypothesis]		
Dynamics	**Temporal Dynamics**	Short-term vs. long-term		
	When does it happen?			
	Functional Dynamics	Linear vs. non-linear (ascending, descending, threshold, tipping points, trigger points, self-reinforcing)		
	How does it happen?			
	Context Factors	Necessary and sufficient conditions for specific outcomes		
	Why do outcomes diverge?			

Regarding the relationship between social policies and outcomes, in Phase III, a key distinction is maintained between causal inference and causal mechanisms, ensuring a nuanced understanding of impacts in terms of their substantive and dynamic effects.

Causal inference. Comparative welfare state research frequently relies on observational data, making causal inference particularly challenging. The non-random distribution of social policies leads to selection bias and confounding variables, complicating efforts to establish causal relationships in welfare state analysis. Hence, conventional ex-post facto designs cannot identify the causal effect (the treatment may be endogenous to other factors). Recent advancements, such as difference-in-differences (DiD), instrumental variables (IV), and synthetic control methods, have strengthened causal analysis in non-experimental contexts by making the most of temporal sequence and quasi-experimental logic (Angrist & Pischke, 2009). These techniques allow researchers to estimate the impact of social policies, including the effects of welfare reforms, such as pension or unemployment benefit changes, across countries with diverse welfare regimes (Jankowski et al., 2025). Whenever suitable, projects in area A and B will use these causal inference methods and novel approaches to evaluate the impact of individual policies within the context of sectoral policy mixes (Fernández-i-Marín et al., 2025, Fernández-i-Marín et al., 2021). A significant challenge for some projects in areas A and B will be to separate the causal effects of social policy from spurious correlations in the data. The focus here is primarily on methods that allow researchers to make causal inferences from observational data (Cunningham, 2021). The range of research designs used for this purpose has expanded considerably (Druckman & Green, 2021). These research designs are accompanied by technical and organizational advances, including, for example, the availability of global online access samples for conducting experiments on heterogeneous and representative populations and software for behavioral experiments (Chen et al., 2016).

Causal mechanisms. While the projects focusing on causal inference will adopt new methodological developments and put them into practice, the CRC's work with causal mechanisms will draw on its own methodological contributions (Heinrich et al., 2022; Kuhlmann & ten Brink, 2021; Nullmeier & Kuhlmann, 2022). In the CRC, the term 'causal mechanism' is used as an antonym to 'causal inference' and aims not only to identify relationships between variables, as is common in quantitative methodology, but to examine the exact relationship between cause and effect (Nullmeier & Kuhlmann, 2022). In the CRC, this approach consists of two complementary methods: one focuses on generalizing across a larger number of cases by isolating individual causal mechanisms through process tracing, while the other relies on detailed case studies informed by the historian's methodological expertise. (1) By linking process tracing to the concept of mechanisms, it gains the potential to examine and explain political and social processes in detail beyond the categories of independent and dependent variables (Nullmeier, 2021). Process tracing, especially the theory-testing and theory-building subtypes (Beach & Pedersen, 2019), analyzes cases modularly along multiple mechanisms, allowing comparisons of single and complex mechanisms across cases. It is important to note that for data collection and analysis, process tracing can be combined with the full spectrum of qualitative methods: in the case of the CRC, ranging from interviews over content analysis to descriptive statistics (e.g., socioeconomic data or opinion polls). In this context, complex causal mechanisms are studied

within the conceptual framework of path dependence and critical junctures (Mahoney, 2000; Slater & Simmons, 2010; Capoccia, 2015). (2) The historical perspective applied in previous funding periods will continue to be based on a classical hermeneutic framework, drawing on source material, including published writings and archival documents. The CRC builds on the proven source criticism and interpretation methods in all historical case studies. To examine how social policy ideas, interests, the institutions of the welfare state, and the agency of individual actors interacted causally in specific decision-making processes, the CRC history projects draw heavily on archival sources of which the CRC researchers will often be first-time users. In addition to using archival material, the CRC sets out to conduct and analyze oral history interviews, thus aiming at incorporating a dimension of personal experience that cannot be grasped using written sources.

Computational Social Science (CSS). While text-based methods such as Natural Language Processing (NLP) and text-as-data approaches are currently the most widely used CSS methods in the social sciences, methodological innovation in CSS is continuous and rapid. We aim to continuously integrate CSS methods into the CRC and assess how using CSS's possibilities and power could change data collection and analysis in social policy research. The INF project in particular will serve as a pivot in this regard. On the one hand, it advises and guides CRC projects and individual members (e.g., PhD candidates) on using CSS methods and will apply CSS methods on its own to fill data gaps in WeSIS. On the other hand, an interdisciplinary space within the CRC will be created to further explore the future of data collection, measurement, and analysis in the field of global social policy, with a particular focus on the use of multimodal data. This will be done within so-called anchor projects, which have been decided upon during the proposal writing phase to ensure concrete research designs and well-managed expectations, as well as the division of labor and resource allocation between the projects and INF. Based on recent innovations in CSS, multimodality provides a framework for understanding the importance of the social in meaning-making and the diversity of modes involved (Bezemer & Kress, 2016). Automated analysis of multimodal data can hardly be considered 'canonical' within the social sciences, yet it offers promising ways to study social policies and their outcomes. It allows for a more holistic perspective on the policy cycle and opens up many possibilities for studying social policy outcomes. Multimodal data can, for example, complement text-based measures of legislative processes with measures of emotion and tone derived from image- and video-based data from social media, TV debates, or recordings of (parliamentary) speeches. One anchor project focuses on protest behavior as an outcome of social policies and aims to use multimodal data, such as video and social media data, to advance Protest Event Analysis (PEA) by utilizing these multimodal data for automated event extraction from unstructured sources. The second anchor project studies immigrants' information acquisition when navigating their social rights in host countries and thus employs multimodal data analysis on unstructured social media data, including link structures and trace data, to measure how information sharing and acquisition are implemented in immigrant (online) communities.

Global Welfare State Information System (WeSIS). The information system plays a key role in conducting empirical research in areas A and B. WeSIS was expanded in the second funding period to include data capturing the generosity of social policies. Existing data are also available on elementary social outcomes encompassing indicators such as fertility rates, life expectancy, or combined welfare indicators (e.g., Human Development Index or SDGs). Such complementary data have been collected since the start of the CRC and will ease the analysis of the outcomes of social policies. Two intertwined objectives will be tackled in considering the future of WeSIS: the data and the system. Regarding data, a key task for WeSIS is to curate and manage the existing datasets by closing gaps through imputation and keeping a core set of indicators up-to-date. Regarding the system, the focus will be on analyzing user behavior and enhancing the system's features in line with end-user needs. Given the public availability of WeSIS, additional challenges arise regarding system performance, information security, and IT services, as well as in promoting, explaining, and communicating WeSIS. Thus, improving the user experience of WeSIS, thus, is key. For this, the INF project will evaluate user interaction with WeSIS and test new features, e.g., chatbots and recommendation systems, to provide a user interface at the end of the CRC that meets the needs of the broadened user group. The ultimate goal is to set the course for WeSIS to outlive the CRC—in terms of institutional anchoring, staffing, data updates, and the technical system itself.

Project areas and projects in the third phase

The organization of the CRC 1342 into two project areas has proved successful and will be retained in the third phase. The A-projects will either examine social policy impacts for a global sample or examine all countries that have introduced a particular welfare program. The task of the projects in area A is to provide an overall assessment of social policy effects in the two outcome dimensions. The projects will primarily use effectiveness and in some cases efficiency as evaluation criteria, taking a global perspective and focusing on the macro-level outcomes. The six projects comprising area A will focus on the impacts of individual social policies, and the timing of their introduction, or entire welfare states on the socioeconomic and political outcome dimensions from a global perspective. Area B comprises six projects that will examine the impacts of social protection schemes on socioeconomic and political outcomes for selected countries or world regions. These projects will provide in-depth inquiries and aim to uncover the effects of social policy from a close-up perspective. The projects in area B will implement so-called 'deep drilling' research designs to identify individual mechanisms by which social policy affects socioeconomic and political outcomes. The information infrastructure project (INF) will provide central services for the entire CRC 1342 and will coordinate the further development of WeSIS across project areas. INF will continue to provide a common data and methods platform for both research areas. During Phase III, sustainable research data management and computational social science methods for comparative welfare state research will be developed. Both are key to establishing WeSIS as a major global welfare state research resource.

Project area A – the global scope. **A05** will explore International Organizations' (IOs) socioeconomic effectiveness in the diffusion of global norms in education and their possible bias toward Western individualistic values. It will thereby focus on the tensions between the promise of globally spread Western standards and regional cultural spheres in education. It has two goals: First, it will investigate the degree and nature of liberalism and individualism in policy recommendations issued by IOs active in education. To do so, it will focus on the 30 IOs identified in the first CRC phase and analyze relevant documents with regard to a potential Western bias in these IOs' education policies. Due to the amount of data, this part will combine qualitative document analysis with a supervised machine-learning-based classifier. Second, it will analyze the effects of education systems, quality of education, and educational inequality on trust and well-being, as well as on polarization in attitudes, using the World Values Survey (WVS). Here, it assumes that group-based socioeconomic outcomes, namely educational equality and inequality (low individualism), or inclusiveness or exclusiveness (universalism) of national education systems, might correspond with political integration, well-being, and polarization.

A06 will investigate the relationship between family policies and socioeconomic outcomes and policy learning based on outcomes combining statistical analysis and in-depth comparative case studies. It will focus on two questions: (1) How do family policies impact women's and children's socioeconomic outcomes? (2) When and how do policy actors adopt information on family policies' socioeconomic outcomes, leading to policy learning? To address the first question, the project will assess how the scope of benefits and inclusiveness of family policies impact women's labor market outcomes and child development indicators, drawing on the new WeSIS family policy database. The project will combine cluster analysis and staggered difference-in-difference methods to analyze policy outcomes across different regions with a cross-sectional micro-perspective on specific family policies and a focus on family policy reforms in specific Latin American countries. To investigate the second question and identify the causal mechanism at play, the project will realize comparative case studies of Germany and Mexico by building a database of relevant documents and interviews, which will be analyzed through qualitative content analysis.

Against the background of demographic aging, the social policy field of long-term care (LTC) is gaining political and societal salience in many parts of the world. By building on the research conducted in the CRC projects A04, A07, and B07, **A07** will examine how LTC policies shape politics and political systems and contribute to political integration. It will do so by employing the concept of policy feedback. More specifically, project A07 will investigate to what extent the type, scope of benefits, and inclusiveness of national LTC systems influence political outcomes in three areas: political attitudes and behavior of the general public, of interest groups, and of political elites. To analyze the effects of feedback on attitudes towards and trust in the (welfare) state and electoral

behavior, particularly of older persons and women, it will draw on international survey data on opinions and voting for all 51 countries with national LTC systems globally. The project will use a comparative case study of Germany, South Korea, and Uruguay to analyze the effects of feedback on interest groups and political elites, which will be based on expert interviews and document analysis.

A08 will address the impact of national social protection systems on international cooperation and resource-sharing patterns. Specifically, it will explore whether protection systems increase or decrease the likelihood of joint action to mitigate global stressors, such as natural disasters, climate change, violence, and war. It conjectures that there are two main ways this impact unfolds. First, the scope and generosity of social protection programs shape group identification and perceptions of deservingness, which in turn guides which global problems are identified as deserving of national assistance and sharing ("political integration") and determines how similar or diverse identification is across different welfare states ("global political integration"). Second, it affects the capacity and incentives of states to share resources across borders ("socioeconomic effectiveness'"). The project aims to develop a liberal theory of how the internal properties of national social protection systems affect the propensity of states to engage in international cooperation and resource sharing. Empirically, it will analyze this impact on three specific global stressors: natural disasters, climate change, and violent conflict at the micro-level (individual states) and the macro-level (international system).

A09 aims to identify the worlds of welfare and their outcomes from a global perspective by relying on new data from the CRC's WeSIS database. Whereas previous research on welfare state patterns has mainly focused on Western democracies, we know little about welfare regimes' diversity, origins, and outcomes in the Global South. Almost all studies analyzing the different worlds of welfare in the Global South use outcome and social spending data and thus cannot measure the design, inclusiveness, and scope of benefits. Based on new data for 165 countries provided by WeSIS, project A09 will investigate which worlds of welfare exist globally and examine their determinants and socioeconomic outcomes. Empirically, it will use principal component analysis and advanced methods of cluster analysis to identify worlds of welfare and constituent countries across the globe. Next, it will rely on the central bodies of welfare state theory and use regression analysis to examine the national constellations such as political, institutional, and socioeconomic factors determining different worlds of welfare. Finally, it will analyze how different worlds of welfare influence socioeconomic outcomes, focusing on poverty and inequality.

A10 will examine the socioeconomic effectiveness of pension reforms worldwide with respect to the following socioeconomic outcomes: fertility and investments in education, female labor force participation, and economic growth as well as their potential impact on political integration. First, it will combine WeSIS data on reforms extending inclusiveness and generosity with micro-level household survey data on fertility and investments in education. To credibly identify causal effects for individual countries, quasi-experimental methods, such as difference-in-difference estimation and instrumental variable techniques, will be used. Second, it will formally model, simulate, and estimate macro-level effects on economic growth. Empirical studies in this part of the project will include calibrated macro-level simulations and cross-country regressions. Finally, it will highlight important policy implications of pension reforms, such as their electoral impact. Focusing on all semi-democratic countries in Latin America and Asia, it will systematize different types of pension reforms, defined as "retrenchment," "restructuring," and "refinancing," and estimate their effects on the re-election chances of incumbents.

Project area B – the regional scope. **B04** aims to explore the under-researched implementation and effects of policies governing immigrants' social rights (ISR). First, B04 will re-examine the so-called "welfare magnet" hypothesis, testing the extent to which access to social protection in destination and origin countries shapes both migration intentions and actual migration flows. Next, it will investigate how destination countries' ISR policies play out "on the ground." Here, B04 will combine large-scale text analyses of social media data for three country pairs (Switzerland–UK, Thailand–Malaysia, Brazil–Argentina) with interviews and document analyses. The goal is to better understand how immigrants perceive and navigate social protection systems. In a third step, B04 will examine how de jure and de facto ISR influence immigrants' socioeconomic outcomes, focusing on inequality and labor market trajectories. Finally, B04 will extend the Immigrant Social Rights (ImmigSR) data collection to cover the years 2022 to 2026. Taken together, B04 will provide empirical evidence on how the inclusion and exclusion of immigrants affect socioeconomic effectiveness and political

integration, highlighting a growing population segment that has often been overlooked in comparative welfare state research.

B05 aims to better understand the outcomes of dualized welfare reform in China. The party-state has built the largest social insurance system in the world, presenting this as an outstanding achievement, ready to mitigate socioeconomic conflict. However, China's welfare system is highly dualized and benefits mainly the urban middle classes, whereas unemployment and downward social mobility are increasing. The project will study how the uneven scope of benefits facilitates socio-economic effectiveness and political integration—and how the stressors of demographic change and transnational economic turbulence affect these. Regarding socioeconomic effectiveness, we ask: To what extent does dualized social protection enable different social groups to cope with the risks of old age, illness, and unemployment? How does it influence mechanisms of downward social mobility? Regarding political integration, we ask: How does welfare dualization affect the satisfaction with and belief in the fairness of social policy? How does welfare dualization affect political support for the party-state? To answer these questions, statistical analyses applying panel regression to datasets based on statistical yearbooks, surveys, and textual data will be conducted. Additionally, the causal mechanisms of downward social mobility will be studied by means of qualitative interview analysis. The latter approach will inform the analysis of political outcomes.

B06 will look at interdependencies linking socioeconomic to political outcomes. We propose that public perceptions are an essential bridge between these areas, mainly blame attribution and perceived deservingness. Accordingly, we expect causal links from socioeconomic outcomes via their public perception to political outcomes. Project B06 will compare the three largest post-Soviet countries, Russia, Ukraine, and Kazakhstan, to better understand these causal links by relying on the expertise and data gathered during phase II. We expect that due to high public expectations, which are a socialist legacy, even rather high socioeconomic effectiveness does not promote political integration. The comparison will cover four standard state-organized social policies (pensions, healthcare, unemployment, and family policy) and will consider a broad range of socioeconomic and political outcomes on the macro- and micro-level. Process tracing will be used to identify causal links for all case studies, i.e., three countries x four policy fields. At the macro-level, descriptive statistics (as compiled in WeSIS) will be used to measure socioeconomic and political outcomes. At the micro-level, the study will draw on already collected representative surveys of the populations, content analysis, document and media analysis, and expert interviews.

B13 will address the relationship between social policy and African protest mobilization. So far, little is known about how welfare regimes, the coverage and inclusiveness of social policies, or specific policy changes inhibit or foster social policy-related protests and social movements. To address these shortcomings, the project will develop detailed and dynamic hypotheses about the relationship between welfare states, social policies, and protests, with features and outcomes of welfare states and social policies as the main independent variable to explain protests as a marker of political integration. To operationalize this, it will use the detailed information about welfare systems provided by the CRC's WeSIS. To measure the dependent variable, it will collect and analyze fine-grained data on the frequency, forms, and issues of protests between 2010 and 2025 in all African countries based on news reports complemented with additional multimodal sources, using Large Language Models (LLMs) for protest event extraction and classification. The main goal is to analyze how social policy outcomes in Africa influence political contention and nonviolent political conflict, while accounting for differences in grievances, political opportunities, and resources.

B14 seeks to explain when and how social policy fosters political integration, e.g., by generating widespread popular support for the political system, and when and how it has the opposite effect, e.g., by exacerbating social divisions and contributing to political disintegration. It will develop a framework that captures different parts of the evaluation process, from social policy design, specifically its inclusiveness and scope of benefits, to policy support and support for the political system. B14 will use a large-N cross-country analysis that combines information on the scope of benefits and inclusiveness collected in WeSIS with standardized public opinion data to investigate correlations between welfare state generosity and support for social policies (effectiveness) and political systems (integration). The second step will be to conduct survey experiments in Germany, Mexico, and South Africa using respondents' actual markers of social group affiliation to test how socially motivated reasoning, self-interest, and views on distributive justice shape citizens' evaluations of the impact of social policies. Finally, B14 will use these insights to design behavioral

experiments with a subsample of respondents from the survey to identify social policy feedback on electoral dynamics and system stability.

B15 will examine the impact of social policy on socioeconomic and political outcomes in Germany, Britain, and Chile in times of fundamental structural change (increasing globalization, technological developments) and severe economic crises (oil crises of 1973, global recession of the early 1980s, and economic downturn of the 1990s). It will assess how different national social protection schemes addressed these intertwined global challenges based on the assumption that the type and instrumental setup of welfare regimes significantly affect their socioeconomic effectiveness and their impact on political integration. Methodologically, the project will combine a comparative perspective with a qualitative multi-level approach. At the global level, it will adopt a global history perspective to highlight the importance of worldwide recessions and transnational economic changes as drivers of social and political developments. At the nation-state level, it will trace the relevant debates, political decisions, and institutional changes in social policy. At the local level, it will focus on particularly affected regions to analyze how individual companies, workers, and social welfare actors worked together or against each other, how they used the existing social policy arrangements, and with which result.

Following the launch of the **WeSIS** Database in December 2024, Project **INF** is transitioning from internally co-creating the system to externally providing it as a sustainable resource. In the third phase, INF aims to establish WeSIS as a public resource, addressing the challenges posed by an expanding user base beyond academia, including effective communication, technical performance, information security, and IT services, to ensure its longevity beyond the CRC. Simultaneously, improving user experience is a priority, with planned evaluations of system interactions through qualitative and quantitative studies as well as the integration of AI-based technologies to enhance functionality. INF will also strengthen research data management (**RDM**) by providing training, offering advisory services, and acting as a bridge between CRC researchers and external RDM providers at the University of Bremen and beyond. Lastly, INF will integrate computational social science (**CSS**) methods into CRC research by developing infrastructures, applying algorithmic solutions for data collection, and measuring social science concepts. These efforts will collectively position INF to secure WeSIS's impact and foster innovation within the CRC framework.

Cooperation between project areas. The intensive collaboration between research projects and with INF has been proven successful and will be continued in the third phase. Table 5 summarizes the multiple collaborations between projects and with INF (also see Section 3.6. in the project proposal). Specifically, we will rely on the following formats: First, the established CRC Jour Fixe series with internal and external lectures on questions of global social policy will be continued in the third phase. Second, we continue to use a set of workshop formats, creating forums for cross-project collaboration. This will include: (i) Thematic workshops bringing together projects focusing on selected dimensions of social policy and addressing specific effects of social policy. (ii) Regional workshops with international experts have proven very efficient in bringing projects together to discuss social policy's particularities and effects in specific world regions. (iii) Methodological workshops bring together projects and INF to address joint methodological challenges. This workshop format will also be used to discuss conceptual questions on how to detect the impact of social policy using qualitative or quantitative data analysis methods relevant to the entire CRC. (iv) Joint publications, a cornerstone of the CRC, will be prepared in joint publication workshops. Third, in cooperation with INF, the workshops for consolidating WeSIS will be continued throughout the entire funding phase. A critical collaboration task will be conceptualizing and operationalizing global aggregated measures (e.g., welfare state-ness index) and/or benchmarks based on the multiple WeSIS indicators. This endeavor requires in-depth exchange across all projects. Furthermore, the established cooperation between research projects and INF in Research Data Management (RDM) will be continued. For example, all projects will develop Data Management Plans (DMPs) under the guidance of Project INF. This will continue with a focus on data protection, data creation processes, and data description and provision. The plan for stimulating and guiding RDM can be found in more detail in the description of Project INF. Finally, in two-day CRC conclaves, the state of progress in the CRC and the projects will be critically reflected upon. This will take place after the first, second, and third years of the CRC's duration in order to keep track of the projects' progress and the initial interim results so that findings can be synthesized early on.

By combining the data from both previous project phases and the joint further development of WeSIS, it will be possible in the third phase to conduct cross-project and cross-project area impact analyses of social policy, which should lead to joint publications. Book publications are planned on the impact of social policy in various policy fields at the overall level of the CRC. In addition, by the end of the third phase, it will be possible to identify social security systems at the global level from both a cross-sectional and longitudinal perspective and to compare their effectiveness. In contrast to existing attempts at classification, which are mainly based on expenditure data, the CRC will use the data collected in the first and second phases to present for the first time a policy-oriented and cross-program analysis of the effectiveness of state-sponsored social policy. Since these data are also available over time, a differentiated impact analysis of social policy over more prolonged periods will be possible. The key results of the third phase will be presented and theoretically systematized in a final conference with international participation. The conference, to which international key speakers and researchers in the field of global social policy will be invited, will be organized around full paper submissions. These submissions will serve as the basis for a thematic selection, leading to an edited volume on the socioeconomic and political outcomes of global social policy to be published by a high-prestige international publisher.

Table 5. *Cooperation between the two project areas*

	A05	A06	A07	A08	A09	A10	B04	B05	B06	B13	B14	B15	INF
A05				X	X				X	X			X
A06			X		X	X					X		X
A07		X							X		X	X	X
A08	X				X		X			X	X		X
A09	X	X		X		X							X
A10		X		X				X		X	X		X
B04			X										A
B05						X			X			X	X
B06	X		X					X		X			X
B13	X			X		X			X		X	X	A
B14		X	X	X		X				X			X
B15			X					X		X			X
INF	X	X	X	X	X	X	A	X	X	A	X	X	

Note: A = Anchor Projects

1.2.3   Positioning of the Collaborative Research Center within its general research area

National. Undoubtedly, research on social policy in the Global South is an emerging field. German social policy research is internationally renowned and well-established, but continues to focus primarily on the rich Western democracies. Hence, social policy in other regions of the world is hardly studied in Germany, even though the vast majority of the world's population lives outside the OECD area. Research on social policy in the Global South in Germany was pioneered by Lutz Leisering at Bielefeld University. Therefore, the CRC established close cooperation with Leisering's working group from the beginning. Lutz Leisering is not only a member of the Scientific Advisory Board, but he also handed over his Bielefeld dataset on social assistance programs in the Global South, which is now available via WeSIS. Moreover, three members of his former working group were recruited by the CRC in the second funding period. After retirement, Lutz Leisering was replaced by Alexandra Kaasch, whose research focuses on the role of international organizations in social policy-making in the Global South. Alexandra Kaasch was a project leader in B12 in the second funding phase, but