# Monitoring the Impact of Social Policy, 1980–2001:

### Social Expenditure Patterns in Aotearoa / New Zealand

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### Introduction

Identifying government policy and programme interventions in order to (inter alia) trace what impacts these may have had on social parameters, has been one aspect of the FWWP research programme. One possible way of tracking policy interventions is to examine government social expenditures. This paper uses data on social expenditure in New Zealand to examine significant social policy events over recent decades. Recourse is made to the OECD social expenditure data-base, which is more user-friendly than other sources and which also has the potential for cross-national comparisons. This OECD social expenditure date is used alongside information on significant social policy events (such as McTaggart, 2005) to track major changes in recent social policy in New Zealand.

The paper first briefly outlines the system of social security in New Zealand before examining the issues involved in using social expenditure data to analyse social policy. The details of the OECD social spending database are then outlined before social spending in New Zealand in recent decades is examined. In particular the following questions are explored.

- 1. What has been the pattern of government expenditure pattern on social services over the last two decades?
- 2. How have the components of that spending changed and how do these changes relate to policy decisions?

### The Social Security System in New Zealand

A useful summary of New Zealand's approach to social security is given by the OECD, who note that:

"The New Zealand social security system is almost entirely composed of income tested support programmes. With only a small number of exceptions, New Zealand's income support programmes have the following characteristics:

- (i) They are funded out of general taxation revenues and do not involve employer or employee levies;
- (ii) Eligibility is primarily dependent on meeting categorical criteria (such as sickness, invalidity, widowhood, lone parenthood, unemployment) and does not depend on a history of contributions;
- (iii) Payments are flat-rate and not related to prior earnings;
- (iv) Assistance is targeted to those in highest need by means of an income test;
- (v) Financing is pay-as-you-go;
- (vi) The system is delivered by central government, with no involvement of local or municipal government or separately administered funds." (OECD, n.d)

# Using social expenditure to analyse policy change

The use of social expenditure data to assess aspects of social policy development and change has a long history in the welfare state literature. Significant examples include Wilensky (1975), Flora and Heidenheimner (1981), Castles (1982), Hicks and Swank (1992) and Castles (2004). However, the use of social expenditure data for this purpose has always provoked debate and this has particularly been the case in recent years as welfare state commentators have attempted to assess the extent of recent welfare state change. In his important work *The Three Worlds of Welfare Capitalism*, Esping-Anderson notes both that "[E]xpenditures are epiphenomenal to the theoretical substance of the welfare state" (Esping-Andersen 1990) and also "[I]t is difficult to imagine that anyone struggles for spending per se" (Esping-Andersen, 1990).

This view appears justified when the problems associated with the use of aggregate social expenditure data are considered. Castles notes

"aggregate expenditure measures... are averages seeking to summarize the extent of a nations' welfare effort in a single number and, as such, are at best only broad-gauge indicators of general trends" (Castles, 2004).

Expanding on this criticism, Pierson suggests that a focus on spending provides information only on "short-term spending patterns" disregarding those changes which result in cutbacks in the long run. He notes such a focus tends to also ignore

"changes in program structure ... (and)... say little or nothing about broader policy changes that may have important consequences for welfare state development" (Pierson, 1994).

The problems with using aggregate social expenditure to analyse change in social policy are obvious. For example, expenditure on one program may increase significantly for a number of reasons, some of which are outlined above, while spending on anther program may be severely curtailed. Overall spending may increase a little or a lot, but the individual program changes are masked by the aggregate figure.

However, despite theses criticisms of the use of expenditure data, in many cases it provides useful insight into welfare state change, particularly when examined at a disaggregated level. Siegal notes:

"A disaggregated analysis of the structure of social expenditure can offer us important insights into the inherent asymmetry between different branches of public social policy provisions. A closer inspection of the composition of the overall social budget can also provide us with valuable estimates for the political salience of different welfare state programmes" (Siegal, 2005).

Castles also supports the use of disaggregated data, such as that available from the OECD SOCX database, suggesting it enables the researcher to do a number of things. First; disaggregated expenditure data "make it possible to improve existing aggregate measures by making them more consistent and more theoretically relevant" (Castles, 2004). Second; "disaggregated data permit us to devise measures of how the structure

of the welfare state has changed over time" (Castles, 2004). Third, such data "permit us to distinguish welfare state structures in terms for the kinds of social provision they offer" (Castles, 2004). Fourth;

"an important advantage of using the SOCX is that it provides disaggregated information on spending patterns for a large number of countries on an annual basis that is readily available for scholarly usage" (Castles, 2004).

This paper seeks to use disaggregated social expenditure data to examine social policy changes that have occurred in New Zealand over the period 1980–2001.

## The OECD Social Expenditure database

The OECD secretariat has assembled comparative data for up to 30 OECD countries, over the period 1980–2001, available via a downloadable data-base. The main data is annual expenditure (in national currency: millions) by programme and by type of programme. Data are provided separately for two broad categories: 'Public expenditure' and 'Mandatory private expenditure'. Public expenditure is government budgets, and mandatory private expenditure requirements imposed by governments on private enterprise or individuals to provide welfare services (e.g., employer provision of maternity leave). There is no data for NZ for the latter category. Programmes are classified as to whether they provide cash or the direct provision of goods and services (For a classification of programmes see Appendix One).

### Using Social Expenditure to examine social policy events in New Zealand

In recent decades in New Zealand, social policy has undergone considerable change, and a comprehensive documentation of these changes is contained in a recent report (McTaggart, 2005). Among the significant changes are:

- 1. The introduction of a 25% surcharge on superannuitants' other income (1984)
- 2. Raising the age of eligibility for the unemployment benefit to 18 (1987)
- 3. Raising of age of eligibility for the Domestic Purposes Benefit to 18 (1991)
- 4. The abolition of universal Family benefit (1991)
- 5. A reduction in benefit levels (1991)
- 6. The introduction of market rentals for state housing and the selling off of the public housing stock (1991)
- 7. Raising the age of eligibility for superannuation to 65 (1992)
- 8. The introduction of Community Wage Scheme (1998).

The extent to which these changes are reflected in social expenditure data is examined below.

Table One below provides an overview of social expenditure patterns as a percentage of Gross Domestic Product (GDP). Over the period 1980 to 2001 total social expenditure hovers around 20 percent of the GDP with a peak value of just over 22

percent in 1991.<sup>2</sup> The period 1990–1999, during which the National government was in office, saw a reduction in social expenditure as a percentage of GDP from nearly 22 percent to around 19.5 percent, and this downward trend is continued under the current Labour Government (although only two years' data are available at present). The details of the overall pattern are more complex with a gradual increase over the 1980s followed by an overall decline through the 1990s (albeit with a short period of increase in the late 1990s).

Each of the categories of expenditure have their own pattern of change over time. There has been a steady fall in expenditure as a percentage of GDP on the elderly (superannuation, Veterans Pensions, etc.), and survivors (widows, orphans, etc.). The declines in spending on Old Age pensions which started in 1992 reflect two changes in policy under the National Government. First was the imposition of a three year freeze in increase to Superannuation payments and second, was the introduction of an increased age of eligibility. This was announced in 1992 and the age of entitlement to National Superannuation rose by five years from 60 to 65 years over the period from 1991 to 2001.

Expenditure on health as a percentage of GDP rose over the period 1980 to 2001 with the largest increases occurring in the early 1990s and from 1998 onwards. Unemployment expenditure rose through the 1980s, and particularly during the late 1980s as the impact of economic restructuring was felt. It peaked at 1.92 percent of GDP in 1991 before trending down over the remainder of the period under examination. Expenditure in the categories of housing and incapacity has risen over the period, while the remaining three areas of social expenditure, family, active labour market and the residual 'other' show more complex patterns (changing over the period but at reasonably similar levels at its beginning and end).

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<sup>&</sup>lt;sup>2</sup> In December 1990 significant reductions in many welfare benefits were announced (Bolger et al, 1990). These reductions took effect in April 1991 and took place alongside the additional reforms announced in the July 1991 Budget. For some categories of beneficiaries the benefits changes removed nearly 25 percent of their weekly income.

Table One: Social Expenditure in New Zealand as a percentage of Gross Domestic Product and as a percentage share of components

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Year	Total expenditure	Old Age	Survivors	Incapacity- related benefits	Health	Family	ALMP	Unemployment	Housing	Other
1980	17.21	6.88	0.3	1.3	5.18	2.19	0.58	0.51	0.07	0.22
1981	17.41	6.92	0.26	1.3	5.55	1.96	0.63	0.55	0.05	0.18
1982	18.34	7.8	0.28	1.44	5.29	1.99	0.7	0.61	0.06	0.18
1983	18.19	7.33	0.25	1.44	5.21	1.95	8.0	0.89	0.1	0.23
1984	17.51	7.03	0.24	1.49	4.86	2.07	0.78	0.68	0.12	0.23
1985	18.09	7.46	0.23	1.64	4.48	2.35	0.91	0.63	0.14	0.25
1986	17.91	6.73	0.21	1.72	4.51	2.58	0.83	0.82	0.18	0.33
1987	18.74	6.54	0.21	1.87	5.05	2.41	8.0	1.07	0.16	0.62
1988	20.16	6.57	0.21	2.09	5.45	2.45	1.0	1.46	0.15	0.77
1989	21.5	6.87	0.23	2.32	5.59	2.66	0.93	1.73	0.16	0.99
1990	21.92	7.28	0.21	2.98	5.72	2.65	0.89	1.92	0.17	0.1
1991	22.32	7.73	0.14	3.05	6.08	2.29	0.84	1.85	0.25	0.09
1992	22.18	7.02	0.14	3.22	5.94	2.28	1.05	1.92	0.49	0.1
1993	20.4	6.4	0.13	3.06	5.51	2.09	0.8	1.63	0.65	0.14
1994	19.4	5.98	0.11	2.86	5.58	2.1	0.75	1.3	0.57	0.16
1995	18.88	5.64	0.11	2.77	5.57	2.1	0.74	1.15	0.63	0.16
1996	18.79	5.47	0.11	2.78	5.49	2.18	0.75	1.18	0.7	0.13
1997	19.78	5.33	0.12	2.96	5.71	2.58	0.72	1.45	0.81	0.11
1998	20.05	5.31	0.12	2.9	6.06	2.57	0.61	1.54	0.84	0.09
1999	19.54	5.07	0.12	2.77	6.06	2.44	0.61	1.56	0.82	0.09
2000	19.21	4.98	0.11	2.8	6.14	2.3	0.56	1.38	0.85	0.09
2001	18.53	4.75	0.11	2.82	6.1	2.18	0.53	1.14	0.82	0.09

# Nominal social expenditure by program

The disaggregated data in Table Two below allow us to further our understanding of the impact of policy changes in particular social policy programs on social expenditure.

As expected, due the increasing proportion of the older population, nominal spending on Old Age support rose significantly over the period as a whole – but declined during the early 1990s as the policy changes identified above were put into place. The decline in nominal spending was such that the level of spending reached in 1991, \$5.5 billion was not reached again until the year 2000.

Table Two: Nominal social expenditure in New Zealand by year at program level (\$000)

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Year	Total public social expenditure	Old Age	Survivors	Incapacity- related benefits	Health	Family	ALMP	Unemployment	Housing	Other
1980	4038.2	1613.9	69.74	304	1216	512.76	136.13	118.76	15.28	51.7
1981	4955	1969.93	75.1	368.85	1580	558.22	180.5	156.43	13.61	52.36
1982	5879.91	2501.19	88.26	461.17	1695	637.55	224.44	195.22	18.96	58.11
1983	6466.86	2605.2	87.7	512.92	1852	691.89	284.43	315.85	34.7	82.17
1984	7032.87	2822.3	94.7	598.36	1953	833.07	314.16	274.69	48.5	94.09
1985	8359.12	3446.53	107.1	756.16	2072	1085.86	418.68	290.46	65.72	116.62
1986	10003.39	3757.92	116.41	960.78	2519	1440.52	461.56	459.68	101.78	185.75
1987	11750.43	4103.23	133.94	1175.5	3619	1508.46	501.81	672.69	97.53	388.26
1988	13611.42	4436.14	144.8	1410.1	3681	1652.34	676.46	987.28	102.34	520.98
1989	15357.87	4909.38	165.96	1656.59	3997	1901.63	664.65	1235.06	117.01	710.6
1990	16027.5	5325.8	152.61	2180.26	4183	1935.91	652.96	1401.63	124.76	70.58
1991	16271.9	5634.27	101.89	2224.81	4436	1670.84	612.74	1347	180.12	64.22
1992	16693.94	5285.58	101.68	2427.21	4475	1717.82	793.95	1445	371.3	76.39
1993	16626.83	5216.08	101.74	2490.22	4488	1705.94	650.15	1329.2	529.98	114.52
1994	16942.52	5224.24	96.96	2497.78	4870	1830.61	650.55	1134.1	499.17	139.11
1995	17493.17	5229.55	101.48	2567.58	5160	1949.06	687.2	1068.7	584.85	144.75
1996	18274.12	5315.26	110.44	2705.87	5342	2117.05	727.9	1146	683.22	126.38
1997	19926.38	5364.46	124.16	2980.64	5750	2602.02	721.3	1456.73	811.38	115.68
1998	20439.42	5413.46	125.71	2955.71	6183	2622.44	618.7	1566.4	858.43	95.57
1999	20926.24	5428.69	127.54	2962.05	6490	2617	656.6	1672.8	880.5	91.03
2000	21861.08	5665.54	129.82	3188.14	6984	2612.31	639.6	1573.5	968.37	99.8
2001	22655.06	5803.95	133.32	3445.74	7455	2661.37	643.86	1397.7	1004.56	109.56

Spending on Incapacity related support rose significantly over the period driven by large increases in the number in receipt of both sickness and disability benefits from the early 1990s onwards. The number of beneficiaries receiving the Sickness Benefit rose from 7,504 in 1980 to 19,511 in 1990 and then to 36,380 in 2002 (MSD, 2005). Similarly the number of people in receipt of an Invalid's benefit rose from 15, 647 in 1980 to 27,824 in 1990 and then to 55,392 in 2002.(MSD, 2005)

Increases in unemployment expenditure reflect the rising levels of unemployment which were experienced from the mid 1980s until the mid 1990s. In 1980 the number of people receiving unemployment related benefits and emergency benefits was 20,850. This figure peaked at 176,872 in 1993 before dropping to 141,214 in 2001 (MSD, 2005). The increase in Housing expenditure, despite the sale of a large proportion of the public housing stock during the early/mid 1990s by the National government (check figures), reflects the increased uptake of the Accommodation Supplement which had been introduced in 1993.

Table Three: Social expenditure by program as a percentage of total social

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Year	Old Age	Survivors	Incapacity- related benefits	Health	Family	ALMP	Unemployment	Housing	Other
1980	0.40	0.02	0.08	0.30	0.13	0.03	0.03	0.00	0.01
1981	0.40	0.02	0.07	0.32	0.11	0.04	0.03	0.00	0.01
1982	0.43	0.02	0.08	0.29	0.11	0.04	0.03	0.00	0.01
1983	0.40	0.01	0.08	0.29	0.11	0.04	0.05	0.01	0.01
1984	0.40	0.01	0.09	0.28	0.12	0.04	0.04	0.01	0.01
1985	0.41	0.01	0.09	0.25	0.13	0.05	0.03	0.01	0.01
1986	0.38	0.01	0.10	0.25	0.14	0.05	0.05	0.01	0.02
1987	0.35	0.01	0.10	0.31	0.13	0.04	0.06	0.01	0.03
1988	0.33	0.01	0.10	0.27	0.12	0.05	0.07	0.01	0.04
1989	0.32	0.01	0.11	0.26	0.12	0.04	0.08	0.01	0.05
1990	0.33	0.01	0.14	0.26	0.12	0.04	0.09	0.01	0.00
1991	0.35	0.01	0.14	0.27	0.10	0.04	0.08	0.01	0.00
1992	0.32	0.01	0.15	0.27	0.10	0.05	0.09	0.02	0.00
1993	0.31	0.01	0.15	0.27	0.10	0.04	0.08	0.03	0.01
1994	0.31	0.01	0.15	0.29	0.11	0.04	0.07	0.03	0.01
1995	0.30	0.01	0.15	0.29	0.11	0.04	0.06	0.03	0.01
1996	0.29	0.01	0.15	0.29	0.12	0.04	0.06	0.04	0.01
1997	0.27	0.01	0.15	0.29	0.13	0.04	0.07	0.04	0.01
1998	0.26	0.01	0.14	0.30	0.13	0.03	0.08	0.04	0.00
1999	0.26	0.01	0.14	0.31	0.13	0.03	0.08	0.04	0.00
2000	0.26	0.01	0.15	0.32	0.12	0.03	0.07	0.04	0.00
2001	0.26	0.01	0.15	0.33	0.12	0.03	0.06	0.04	0.00

The data in Table Three show us how the relative position of different categories of social spending has changed over the period 1980–2001. In 1980, spending on Old Age consumed approximately 40 percent of total public social expenditure with expenditure on health just over 30 percent. The position of the two categories changed during the mid 1990s and from 1997 onwards expenditure on health comprised a larger and growing proportion of total spending than that on Old age programmes.

# The limitations of social expenditure data to monitor the impact of social policy change in New Zealand

The material above indicates the utility of using social expenditure data to examine social policy change. However, in some cases of policy change social expenditure data is less useful. Primary among these types of changes are those that reflect shifts in the principles or ideology which underpin welfare provision by the state. For example, during the 1990s the discourses around welfare receipt which became dominate were those of welfare dependency which tended to stereotype beneficiaries as lazy, unwilling to work and needing to reattached via sanctions to the labour market. While the impact of this discourse may result in some lowering of the

numbers of beneficiaries and hence a reduction in social expenditure, its impact cannot easily be measured via expenditure data.

### Conclusion

Social expenditure data of the type available through the OECD is an important part of understanding policy change – is necessary but not sufficient on its own for proper understanding need both additional data – i.e., numbers of recipients and knowledge of policy changes as the impact of these is not always immediately reflected in social expenditure data. Nevertheless, the data provided in this report is a solid foundation of levels and major categories of state financial support against which to relate other information.

# Appendix One: Categories of Social Protection: OECD definitions, Source: OECD Social Expenditure Data-Base

Table 1: Categories of Social Protection: OECD definitions Source: OECD Social Expenditure Data-Base

# Total social expenditure

Social expenditure is the provision by public (and private) institutions of benefits to, and financial contributions targeted at, households and individuals in order to provide support during circumstances which adversely affect their welfare, provided that the provision of the benefits and financial contributions constitutes neither a direct payment for a particular good or service nor an individual contract or transfer. Such benefits can be cash transfers, or can be the direct ('in-kind') provision of goods and services.

# 1. Old age

Old-age comprise all cash expenditures (including lump-sum payments) on old-age pensions within the public sphere. Old-age cash benefits provide an income for persons retired from the labour market or guarantee incomes when a person has reached a 'standard' pensionable age or fulfilled the necessary contributory requirements. This category also includes early retirement pensions: pensions paid before the beneficiary has reached the 'standard' pensionable age relevant to the programme. Excluded are programmes concerning early retirement for labour market reasons which are classified under unemployment.

The Social Expenditure Database includes supplements for dependants paid to old-age pensioners with dependants under old-age cash benefits. Old age also includes social expenditure on services for the elderly people, services such as day care and rehabilitation services, home-help services and other benefits in kind. It also includes expenditure on the provision of residential care in an institution (e.g., the cost of operating homes for the elderly).

### 2. Survivors

Many countries have social expenditure programmes in the public sphere which provide the spouse or dependent of a deceased person with a benefit (either in cash or in kind). Expenditure in this policy area has been grouped under survivors. Allowances and supplements for dependent children of the recipient of a survivors' benefit are also recorded here.

# 3. Incapacity-related benefits

Disability cash benefits comprise of cash payments on account of complete or partial inability to participate gainfully in the labour market due to disability. The disability may be congenital, or the result of an accident or illness during the victim's lifetime.

Spending on Occupational injury and disease records all cash payments such as paid sick leave, special allowances and disability related payments such as pensions, if they are related to prescribed occupational injuries and diseases. Sickness cash benefits related to loss of earning because of the temporary inability to work due to illness are also recorded. This excludes paid leave related to sickness or injury of a dependent child which is recorded under family cash benefits. All expenditure regarding the public provision of health care is recorded under health. Social expenditure on services for the disabled people encompasses services such as day care and rehabilitation services, home-help services and other benefits in kind.

### 4. Health

Social expenditure data in the health policy area is taken from the OECD Health database (OECD, 2003). All public expenditure on health is included (not total health expenditure): current expenditure on health (personal and collective services (HC.1 to HC.7 in the ICHA) and investment (HC.R.1). Expenditure in this category encompasses, among other things, expenditure on in-patient care, ambulatory medical services and pharmaceutical goods. Individual health expenditure, insofar as it is not reimbursed by a public institution, is not included. As already noted, cash benefits related to sickness are recorded under sickness benefits.

# 5. Family

Family include expenditure which supports families (i.e., excluding one-person households). This expenditure is often related to the costs associated with raising children or with the support of other dependants. Expenditure related to maternity and parental leave is grouped under the family cash benefits sub-category.

# 6. Active labour market programmes

The category active labour market programmes (ALMP) contains all social expenditure (other than education) which is aimed at the improvement of the beneficiaries' prospect of finding gainful employment or to otherwise increase their earnings capacity. This category includes spending on public employment services and administration, labour market training, special programmes for youth when in transition from school to work, labour market programmes to provide or promote employment for unemployed and other persons (excluding young and disabled persons) and special programmes for the disabled. For more detailed information regarding the categorization of expenditure on ALMP, see the Employment Outlook, OECD, 2002, <a href="http://www.oecd.org/els/employmentoutlook">http://www.oecd.org/els/employmentoutlook</a>.

## 7. Unemployment

The category unemployment includes all cash expenditure to people compensating for unemployment. This includes redundancy payments out of public resources as well as pensions to beneficiaries before they reach the 'standard' pensionable age if these payments are made because they are out of work or otherwise for reasons of labour market policy.

### 8. Housing

Rent subsidies and other cash benefits to the individual to help with housing costs.

### 9. Other social policy areas

This category includes social expenditure (both in cash and in kind) for those people who for various reasons fall outside the scope of the relevant programme covering a particular contingency, or if this other benefit is insufficient to meet their needs. Social expenditure related to immigrants/refugees and indigenous people are separately recorded in this category. Finally, any social expenditure which is not attributable to other categories is included in the sub-category other.

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