

State of the Art: Have Social Policy Responses to COVID-19 Been Institutionalised?

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Countries adopted a variety of social policy responses to reduce the social risks exacerbated by the COVID-19 pandemic, which in some cases took the form of institutional reforms. The study of the institutionalisation of emergency responses is relevant to understanding if and how a critical juncture, like the one opened by the pandemic, can generate path dependencies or changes that expand or retrench social protection. This state-of-the-art article offers an overview of how social policy responses to the pandemic have translated to institutional reform across the globe under various types of welfare systems. By conducting a systematic literature review of thirty-nine peer-reviewed journal articles in two leading bibliographic databases (Scopus and Web of Science), this article reviews the available evidence on the responses to the pandemic and their institutional consequences. We find four underlying research clusters regarding the degree of institutionalisation of the social policy responses implemented during the pandemic.

Keywords: Coronavirus, welfare state, path-dependence, pandemic, literature review.

Introduction

The COVID-19 pandemic represented an unprecedented shock that posed multiple challenges to welfare regimes across the globe (Béland *et al.*, 2021; Miller, 2021; Mok *et al.*, 2021). All social policy areas were stressed to a limit, as the multiple health, economic and social crises triggered by the pandemic threatened people's livelihoods in all regions of the world. Governments responded differently, introducing changes that at least partially aimed to offer their citizens health, income, and labour protection, to significant variations in their outcomes (Dorlach, 2022). Gentilini (2022) tracked social policy responses to COVID-19, confirming that a large part of the response focused on short-duration cash transfers early in the pandemic and with low replacement rates. At the same time, families and individuals were forced to undertake emergent actions to deal with the shock and to adapt to the state's presence or absence in social policy provision (Luttik *et al.*, 2020; Daly, 2021).

In this state-of-the-art article, we aim to examine the degree of how social policy responses to the pandemic have translated to institutional reform across the globe. We adopt an institutionalist lens focusing on path dependency, critical junctures and policy

feedback derived from the emergency social policy reforms. We will focus on what has been the focus of academic studies from a social policy perspective so far. That is why we are conducting the systematic literature review using Scopus and Web of Science. Therefore, it is important to recognise that relevant publications not indexed in these databases (i.e. grey literature) will not be included.

The state-of-the-art article is organised as follows. The next section presents the theoretical framework of the institutionalist perspective adopted in this article, focusing on institutions, crises and critical junctures. The third section presents the methodology for conducting the systematic literature review and its results. The fourth section establishes a dialogue between the five articles included in this themed section and the thirty-nine articles of the systematic literature review. This last section discusses the potential path-dependent or divergent transformations of social welfare systems resulting from the shock of the pandemic across geographical regions and social policy areas.

Institutions, crises and critical junctures

In recent decades the study of institutions has come to occupy a central space in political science and public policy research. The causes and consequences of the development of institutions are considered decisive factors in explaining government success or failure. A group of neo-institutionalist perspectives emphasise different ways in which formal and informal institutions interact with the ideas and interests of political and social actors to explain the unfolding of political, economic and social phenomena and their outcomes.¹ These perspectives include historical and constructivist institutionalism, the two being frequently combined. In different degrees and with distinct effects, all perspectives consider the construction and enforcement of formal institutions as necessary elements of the solutions to social problems (Hall and Taylor, 1996; Cairney, 2012; Dodds, 2012). Following previous conceptualisations of formal institutions, Brinks *et al.* (2020) define them as the set of officially sanctioned rules that structure human behaviour and expectations around activities or objectives. Formal rules specify the actors that participate in political processes and the roles they are assigned; demand, permit or prohibit certain behaviours; and establish the consequences of their compliance or non-compliance. They establish the distribution and redistribution of public goods and services, set the rules of the political game and the means to solve social conflicts, determine the opportunities and constraints for political action and mould the ideas, interests and decisions of actors who participate in the public sphere (Pierson, 2004; Mahoney and Thelen, 2015; Fioretos *et al.*, 2016).

Strong institutions hold the potential to shape political reality to generate positive outcomes of political processes in terms of social justice, freedom, equality and solidarity. When an institution is strong, it redistributes and refracts power, authority and expectations to achieve its intended outcome, which diverges from the outcome that would otherwise occur (Brinks *et al.*, 2020). Stability has been underscored as a critical dimension of institutional strength; it refers to the endurance of an institutional arrangement across time and beyond the changes in the conditions of the political context under which they were created (Levitsky and Murillo, 2010). Stability does not imply that institutions should remain static. On the contrary, strong institutions are endowed with sufficient flexibility for actors to adapt them to changing contexts without abandoning their desired objectives. Compliance would represent another dimension of institutional

strength – namely, the degree to which institutions are enforced and complied with in practice (Levitsky and Murillo, 2010; Brinks *et al.*, 2020). The two dimensions combined would define strong institutions. Public policies, understood as courses of state actions undertaken to address public problems, involve the development of strong institutions with the capacity to improve social welfare.

Under historical institutionalism, the effects of crises and critical junctures are highlighted as causal mechanisms of the introduction and transformation of institutions and public policies. Dictionary definitions of crisis refer to times of great disagreement, confusion, suffering, or extremely difficult or dangerous points in a situation (Cambridge Dictionary, 2022). Crises represent exogenous shocks that hit a set of institutional arrangements, enhancing the effects of anomalies that may have been accumulating for a certain period (Hall, 1993). Crises can be chronic or long-lasting or brief and acute. They may affect the whole functioning of a polity or only certain segments (Volpi and Gerschewski, 2020). Whatever their nature, crises increase the perceptions of the severity of public problems and the number of people affected by them. Crises may lead to calls for enacting institutional and policy reforms and can open and shape critical junctures.

Critical junctures have been defined as relatively short time periods in which the structural influences on political action are relaxed, the range of policy options to alter institutional structures widens and the probability of changes induced by powerful actors increases (Capoccia and Kelemen, 2007). Periods are conceptualised as short in relation to subsequent periods of stability, whilst the probability of change is evaluated in relation to the probability that would otherwise exist if the critical juncture had not opened. Critical junctures are considered foundational moments of political trajectories, associated with major institutional and policy changes that diverge from preceding trajectories and generate new long-lasting ones. During a critical juncture, the nature, intensity and extension of problems that could form part of a crisis can lead to questioning the suitability of existing institutional orders to address them. As institutional structures become fragile, the capacity of actors to promote and apply changes increases. Institutional structures turn fragile and institutional and policy changes are incorporated into public discussions and placed in public, political and government agendas. In other words, the power of agency is capable of overcoming the structuring power of institutions. The severity of problems can promote reinterpretations of their causes and the objectives that public action should pursue to address them. Major change results as existing institutions are dismantled and new ones are created to adapt public policy objectives to new interpretations of public problems, and the actions deemed necessary to address them (Hall, 1993; Capoccia and Kelemen, 2007; Capoccia, 2016). However, there are also cases where no change occurs.

To understand why change is produced or not, authors like Volpi and Gerschewski (2020) propose to separate the analysis of crises and critical junctures. These authors define a crisis as a moment of fluidity and openness that necessarily precedes a critical juncture; whilst the latter would not emerge without the former, there may be crises that do not open critical junctures. Once a critical juncture has been created, Soifer (2012) suggests distinguishing between its permissive and productive conditions. Permissive conditions represent the initial factors that weaken the structural constraints of change. Productive conditions are the factors that impact a political process after permissive conditions have appeared and end up producing change. Hence, critical junctures may exhibit the emergence of permissive conditions, but the productive conditions may not develop or may not be sufficient to generate change. The analysis of antecedent

conditions is necessary to explain why and how a crisis could result in the questioning of the institutional status quo and why and how, once that process begins and a critical juncture is created, permissive and productive conditions may surge and interact to generate institutional and policy changes. Capoccia and Kelemen (2007) also point out that a critical juncture may affect a set of institutions, and others may remain unaffected. They also comment on the importance of the length of a critical juncture: the longer it lasts, the higher the probability of dramatic changes. Analysing the timing, sequencing and conjuncture of previous and present events and decisions is necessary to understand the dynamics that unfold during crises and critical junctures (Pierson, 2004).

If path dependence is strong enough to constrain the possibility of changes, crises and critical junctures may not result in any substantial or enduring modifications to the status quo. Path dependence refers to the tendency of public affairs to continue along a certain path due to the influence of past events. Over time, the introduction and effects of the institutions that constitute a path increase the attractiveness of continuity; feedback mechanisms like social and political support and the complexity and interlocking of existing institutional arrangements generate it. The level and distribution of power among actors with vested interests in an institutional path explain the materialisation of change or continuity; when actors interested in its continuity hold more power than those who favour alternatives, the former's preferred outcome is likely to occur (Pierson, 2015). Each path generates its own feedback mechanisms, which shape its development: self-reinforcing mechanisms promote continuity, whilst self-undermining mechanisms enable changes. Whether continuity or change takes place depends on the balance of both types of mechanisms as interpreted by the actors that hold power to decide on institutional and policy trajectories (Jacobs and Weaver, 2015; Béland and Schlager, 2019). A crisis may not be sufficient to initiate a critical juncture if path dependence is strong. If it does, the permissive or productive conditions might not be sufficient to bring about path divergence and result in no change or only incremental changes.

In short, studying institutions (namely, the rules and norms that structure politics) is crucial to understanding the achievements and failures of state actions. In any country, solid and stable formal institutions are necessary to distribute and redistribute public goods to address public problems and improve the population's living conditions. Crises and critical junctures represent moments when major modifications of political, social and economic institutional structures are possible. The extension and intensity of the effects of public problems can lead to the questioning of the adequacy of existing institutional structures to address them and result in the proposal and introduction of reforms. However, the link between crises, critical junctures, and actual change is complex. Path-dependent variables limit and shape impulses for change and constrain the possibility of designing and implementing path-divergent public actions. The combination of these theoretical concepts would explain why crises may lead to institutional and policy changes in some cases and why in others, they do not.

Systemic literature review: Have social policy responses to COVID-19 been institutionalised?

Conducting systematic literature reviews implies following a methodical search to find relevant publications regarding our research question: How have social policy responses to COVID-19 translated to institutional reforms? First, we defined a combination of

keywords on the topic of interest: (“social policy” OR “social protection” OR “cash transfer”) AND (“covid”) AND (“reforms”). We considered these keywords to be relevant and precise as they match the scope and focus of our research question.²

We searched in two of the largest and most prestigious academic bibliographic databases: Scopus and Web of Science (WoS), to concentrate the review on the focus of academic studies from social policy perspectives so far. In Scopus, we searched within the article title, abstract and keywords, while in WoS, we searched within ‘topic’. The search on 24 November 2022 retrieved forty-six articles in Scopus and twenty-two in Web of Science. After limiting the document type to “article”, the result is thirty-eight articles in Scopus and twenty in Web of Science. Thirteen articles appear in both databases, leaving us with forty-five unique articles. Five articles were finally removed from the analysis because they do not address social policy reforms during or after the pandemic, and one does not address social policy reforms at all, which leaves us with thirty-nine relevant and unique articles for the analysis.

All thirty-nine articles were scrutinised thoroughly and revealed four underlying research clusters regarding the degree of institutionalisation of the social policy responses implemented during the pandemic. The first research cluster shows experiences with a lack of or limited social policy response from the political system to particular members of society. In the second research cluster, social policy responses are in place but without fundamental or path-breaking reform of the welfare system. The third cluster shows political systems institutionalising at least one social policy programme or scheme. Finally, in the fourth cluster, authors propose necessary reforms evidenced by the pandemic.

We constructed a matrix with a unique identifier, database, authors, publication date, title, Journal Title, DOI, keywords, purpose, method, sample/countries, summary, main findings and theme to reach this number of clusters. The theme of each article was used to define the clusters. Themes were coded manually following an iterative theme coding process while carefully revising the articles. Finally, we analysed the studies in each cluster for critical reflection. Table 1 shows the articles grouped in their specific research clusters with the sample of cases studied and the article’s purpose.

Cluster 1: A lack of or limited social policy response from the political system

Social policy responses to the pandemic were limited (or even absent) to cover the social risks of vulnerable sectors of the population. As a result, due to the lack of or limited response to the needs of these individuals, it is impossible to think of a potential institutionalisation of a reform in the research grouped within this cluster.

In Jordan, the minimum wage was not amended, and the labour law was insufficient to protect workers’ job security, income and safety (Alsawalqa *et al.*, 2022). In Canada, the state response for immigrant women in the long-term care sector was insufficient to guarantee they had earnings similar to those before the pandemic (Lightman, 2022). Workers in the small-scale fisheries sector in South Africa and peasants in Zimbabwe were also excluded from the state social policy response (Mufamadi and Koen, 2021; Sowman *et al.*, 2021; Tom, 2021). The absence of a state response to the pandemic increased their pre-existing vulnerabilities. However, fishermen and peasants acted as alternative welfare providers by satisfying social needs and risks using social policy by other means (e.g. providing food, lobbying for reforms, and providing welfare through church congregations) (Seelkopf and Starke, 2019). The digital divide was also an exclusion mechanism

Table 1 Summary of articles in research clusters

Author(s)	Sample	Key findings
Cluster 1: Lack or limited response (no institutionalisation)		
(Alsawalqa <i>et al.</i> , 2022)	Jordan	<ul style="list-style-type: none"> • There is a lack of public safety tools and requirements relating to social protection among labour categories
(Lightman, 2022)	Canada	<ul style="list-style-type: none"> • The temporary wage increase to essential workers was insufficient to make up the difference in their lost income due to the single-site policy
(Sowman <i>et al.</i> , 2021)	South Africa	<ul style="list-style-type: none"> • The lack of social protection and the limited emergency relief provided by the government further exacerbated the small-scale fishing community's precarious position.
(Tom, 2021)	Zimbabwe	<ul style="list-style-type: none"> • Social protection measures were not implemented to safeguard peasants' health and satisfy their socioeconomic needs • In the absence of state intervention, alternative actors provide social policy by other means
(Ghiraldelli, 2021)	Brazil	<ul style="list-style-type: none"> • There were many obstacles to accessing emergency aid, especially for the poorer, less educated population, who are homeless and in vulnerable conditions (the online application was made through a mobile device)
(Mufamadi and Koen, 2021)	South Africa	<ul style="list-style-type: none"> • The temporary cash transfer system (TERS) excludes a large part of employees who are considered to be independent contractors
Cluster 2: Response in place without fundamental or path-breaking reform		
(Hong and Ngok, 2022)	China	<ul style="list-style-type: none"> • The pandemic prompted a recentralisation of social policy regulations and social governance innovations
(Liu, 2022)	China	<ul style="list-style-type: none"> • The pandemic has stimulated digital social policy governance and accelerated the online application of welfare state clients • Unlike the SARS pandemic, the consequences of COVID-19 have not evoked discourses and narratives on fundamental change and path-breaking reform in the arena of social policy • The state's responsibility and obligation in public welfare have been further strengthened, and market-centred discourse in social policy has seen a downward trend

Table 1 (Continued)

Author(s)	Sample	Key findings
(Maino and De Tommaso, 2022)	Italy	<ul style="list-style-type: none"> • An extraordinary and temporary anti-poverty measure—the Emergency Income (Reddito di Emergenza, REM)—was introduced to cope with the increase in relative and absolute poverty
(Pavolini <i>et al.</i> , 2022)	Europe	<ul style="list-style-type: none"> • A relatively generous response to the crisis was made in almost all countries • The common approach in Europe has been dominated by temporary, short-term and one-off measures, which do not represent significant changes to the social security schemes that were in place before the pandemic
(Arup, 2022)	Australia	<ul style="list-style-type: none"> • The Government responded with temporary protections, but it left employers free to determine employment security, and it made sure to end the generous social security
(Mustafa and Berisha, 2022)	Kosovo	<ul style="list-style-type: none"> • The regime’s feedback, institutional capacities and state veto points create barriers to social policy expansion
(Leisering, 2021)	Global	<ul style="list-style-type: none"> • The measures taken by governments expectedly have just been stopgap measures of a transitory nature • International organisations are aspiring to future-oriented policies and present a range of concepts for the time after the crisis
(Gronbach and Seekings, 2021)	Southern Africa (Botswana, Zambia and South Africa)	<ul style="list-style-type: none"> • The shock of COVID-19 in Southern Africa did not prove to be a ‘critical juncture’: Powerful pro-reform coalitions did not form to shift governments onto new policy paths • International organisations lobbied strongly for reforms but were often unable to persuade national governments to embark on their preferred reforms • The crisis had not led to any enduring pressure for the reformulation of the social contract between the state and society
(Dukelow, 2021)	Ireland	<ul style="list-style-type: none"> • The pandemic has brought the state back into social and labour market policy with force, generating a scale of welfare and work support unthinkable prior to the crisis • Too soon to know if the crisis poses a foundation for a critical juncture to transform the welfare system.

(Continued)

Table 1 (Continued)

Author(s)	Sample	Key findings
(Béland <i>et al.</i> , 2021)	Global (mainly high-income countries)	<ul style="list-style-type: none"> • The design and scope of the emergency policy responses to COVID-19 vary across countries • Existing national policy legacies matter to explain differences • Responses are generally grounded in “emergency Keynesianism”
(Cantillon <i>et al.</i> , 2021)	Germany, Belgium and the Netherlands	<ul style="list-style-type: none"> • All three countries strengthened social protection systems for the active age population to varying degrees, but without changing their course
(Hick and Murphy, 2021)	UK and Ireland	<ul style="list-style-type: none"> • The policies announced in response to COVID-19 constitute a form of disruptive change—departures, albeit of a temporary kind, from the status quo • Too soon to confirm if the reforms will create their feedback effects, opening up the possibility for path-departing change
(Ramia and Perrone, 2021)	Australia	<ul style="list-style-type: none"> • Unprecedented policy turnaround towards welfare generosity and the almost total relaxation of conditionality • A conservative, anti-welfarist government introduced it
(Robson, 2020)	Canada	<ul style="list-style-type: none"> • During the first wave, the government of Canada shifted the traditional targeted measure of verifying eligibility before giving cash transfers, and it changed to giving and verifying (temporary switch)
Cluster 3: Institutionalisation of at least one scheme or programme (Lukáčová <i>et al.</i> , 2022)	Central and Eastern Europe	<ul style="list-style-type: none"> • Short-time work schemes were institutionalised in Czechia and Slovakia • Discussions between the social partners and the government on the short-time work in Slovakia started before the pandemic • State control over social policy remains very strong and shapes the dynamics of industrial relations
(Martínez, 2022)	Spain	<ul style="list-style-type: none"> • During the pandemic, short-time work was reinforced and normalised to reduce dismissals and temporary employment • The Short-time week provides companies with a permanent mechanism for future crises and is beneficial to social security because it avoids instability
(Natili <i>et al.</i> , 2022)	Germany, Italy, and the Netherlands	<ul style="list-style-type: none"> • Social policy legacies played a significant role in shaping the direction of short-term responses

Table 1 (Continued)

Author(s)	Sample	Key findings
(Dolado <i>et al.</i> , 2021)	Spain	<ul style="list-style-type: none"> • Only in the Netherlands, the pandemic accelerated a change already underway to abandon insurance-based schemes for non-contributory universalistic benefits • Short time week was institutionalised • Not a new policy but the reinforcement of an existing one in the labour policy
(Yuda <i>et al.</i> , 2022)	Indonesia, Malaysia, Philippines and Thailand	<ul style="list-style-type: none"> • Social policy responses to the crisis have tended to be temporary extensions, with a rare degree of reform or innovation, but open greater possibilities for future institutionalisation of new policies • Social assistance with a particular emphasis on conditional/unconditional cash transfer has been the focal point of social protection in all four countries • COVID-19 has produced fewer systemic changes, resembling first-order changes (Hall, 1993) • Unemployment benefits in Indonesia have now become an institutionalised policy that is even permanent in nature (formal sector) • The remaining policies are the continuation of the reforms initiated in response to the economic crisis of 1998. The COVID-19 policy responses must be viewed as an unfinished agenda of expansion-driven policy responses to the 1997–1998 financial crisis
Cluster 4: Proposals of necessary reforms evidenced by the pandemic (Chung, 2022)	Global	<ul style="list-style-type: none"> • A “four-day-week” has the potential to address many of the societal challenges left by the COVID-19 pandemic
(Bayarsaikhan <i>et al.</i> , 2022)	Global (focus on low- and middle-income countries)	<ul style="list-style-type: none"> • Address potential reforms that should be made for Universal Health coverage and social health protection based on the learnings from the pandemic • The COVID-19 pandemic has provided valuable lessons to improve multi-sector activities to strengthen and finance health and social protection systems
(Enggist <i>et al.</i> , 2022)	Spain, Germany, and Sweden	<ul style="list-style-type: none"> • The COVID crisis has at least temporarily reduced the relative priority people attach to pensions, potentially providing policymakers with an opportunity to advance reform proposals in other areas

(Continued)

Table 1 (Continued)

Author(s)	Sample	Key findings
(Sovani, 2022)	European Union	<ul style="list-style-type: none"> • There is a need for resilience, effective and well-designed active labour market policies and social protection systems, including investment in education and skills training. This will become the basic foundation for sustainability
(Vesan <i>et al.</i> , 2021)	Europe	<ul style="list-style-type: none"> • The COVID-19 pandemic crisis may represent a new window of opportunity for the Commission, as a policy entrepreneur, to further reform the Semester's social dimension
(Olivier and Govindjee, 2021)	South Africa	<ul style="list-style-type: none"> • The South African government have deepened the unequal treatment of different categories of non-citizens to safety nets and economic, poverty and alleviation schemes • The authors provided valuable guidelines on how the South African government can amend acts and regulations to include non-citizens (including asylum seekers, unaccompanied minors and other non-citizens in vulnerable positions) in current and future social assistance and labour market policies.
(Bekker, 2021)	European Union	<ul style="list-style-type: none"> • The response from the EU is based on conditional finance support advocating investment (instead of austerity as before) using grants in combination with loans. However, national governments still have some leeway to present reforms • The pandemic offers substantial momentum to accelerate long-awaited reforms (such as reshaping the paradigm of health spending and building more equitable social safety nets) to better prepare for future public health emergencies
(Chen and Fan, 2021)	China and United States	<ul style="list-style-type: none"> • The pandemic offers substantial momentum to accelerate long-awaited reforms (such as reshaping the paradigm of health spending and building more equitable social safety nets) to better prepare for future public health emergencies
(Yuda <i>et al.</i> , 2021)	Indonesia	<ul style="list-style-type: none"> • The community needs to be incorporated into social policy reform decisions • In the absence of the state in some communities, the community organised and acted by providing food, quarantine houses, and ambulance unit (social policy by other means)
(Gaffney <i>et al.</i> , 2020)	United States	<ul style="list-style-type: none"> • Addressing financing dysfunctions on a disease-by-disease basis, after all, is neither efficient nor fair. The COVID-19 outbreak serves as a reminder of the benefits of a unified, national health programme

Table 1 (Continued)

Author(s)	Sample	Key findings
(Akinleye <i>et al.</i> , 2020)	Africa	<ul style="list-style-type: none"> • COVID-19 has brought into focus the need for healthcare reforms that promote access to affordable care and correct limitations such as insufficient health workers and the inadequacy of drugs and equipment
(Sinclair, 2022)	Scotland	<ul style="list-style-type: none"> • The exigencies of COVID compelled innovations in policy-making and accelerated practices consistent with a strategic approach • The challenge facing social policymakers in Scotland, and others who advocate a strategic social policy approach, is how to sustain and extend what has been learned from the COVID emergency
(Baptista Marques and Silveira, 2021)	Brazil	<ul style="list-style-type: none"> • The pandemic questions neoliberal policies and presents the need to structure different policies in the welfare state, such as health, sanitation, and urban policies
(Ceron and Palermo, 2021)	European Union	<ul style="list-style-type: none"> • The window of opportunity of the pandemic should be used to address urgent reforms in the European Union that are needed to invest in rebuilding European societies

from the social policy response. To apply for emergency aid in Brazil, the population needed to complete an online application through a mobile. Therefore, this digital obstacle adds to the non-take-up problem by excluding those living on the streets and in vulnerable conditions without access to a mobile or the internet (Ghiraldelli, 2021).

Cluster 2: Social policy responses in place but without fundamental or path-breaking reform of the welfare system

Even though political systems might have responded to the crisis by strengthening or creating new social policy schemes, a large part of the research shows it does not create a path-breaking reform of the respective welfare system. We can categorise the responses in this cluster in three areas: (1) emergency short-term measures, (2) reforms in place but too soon to know if the pandemic starts a critical juncture that supports a transformation of the welfare system, and (3) reforms in place, but substantial policy change and institutionalisation difficult due to veto players.

Emergency short-term measures were popular. Italy introduced the Emergency Income – an extraordinary and temporary anti-poverty measure – to alleviate income poverty during the coronavirus crisis (Maino and De Tommaso, 2022). This resembles the common European approach, where countries relied on temporary, short-term and one-off programmes to alleviate social risks without altering the welfare system (Pavolini *et al.*, 2022). Going beyond

Europe, social assistance programmes were the most popular. The creation of new programmes was preferred over the scaling-up of existing programmes, and they were transitory measures with one-off or multiple payments (Leisering, 2021).

In some places where social policy reforms were put in place, it is still too soon to know if they will create a departure and transform the welfare system. Béland *et al.* (2021) found in their special issue that social policy responses varied across countries, policy legacies shaped the responses and were grounded on ‘emergency keynesianism’ and differed from the social policy responses to the 2007-2008 financial crisis. However, Béland and colleagues acknowledged the difficulties of confirming a potential reshaping of the welfare system and institutionalising these social policy responses because the pandemic was still developing and empirical evidence was limited. Dukelow (2021: 61) points in the same direction when stating that even though the pandemic has brought the state back into the labour market and social policy to unthinkable levels prior to the crisis, it is still too soon to know if this is going to be ‘momentary, a part of a new round of “crisis routine”, or whether it poses the foundation for a deeper, critical juncture and a more enabling, supportive activation and social protection system’.

Third, research mentions that institutionalising social policy reforms might be difficult due to veto players. The pandemic facilitated the arrival of a left-wing majority for the first time in Kosovo. However, social policy expansion and the transformation of welfare policies are constrained by the neoliberal regime, feedback on policy learning and right-wing actors (local and international organisations) who favour the status quo (Mustafa and Berisha, 2022). The external shock of the pandemic did not prove to be a critical juncture because local pro-reform coalitions with sufficient capacity did not form to change the current policy paths, even though international organisations favoured the expansion of the social policy to urban poor populations (Gronbach and Seekings, 2021).

Cluster 3: Institutionalisation of at least one social policy programme or scheme

The institutionalisation of social policy programmes occurred in Europe and South-East Asia. All cases related to wage subsidies (i.e. short-time weeks) and unemployment programmes. The short-time week was institutionalised in Spain and Central and Eastern Europe. In Spain, the short-time week was reinforced and institutionalised to reduce dismissals and temporary employment (Dolado *et al.*, 2021; Martínez, 2022). Short-time work schemes were also institutionalised in Czechia and Slovakia; however, governments did not reform existing unemployment regimes (Lukáčová *et al.*, 2022). In the Netherlands, the pandemic accelerated a policy change that was underway before the crisis, where universal non-contributory benefits were put in place of traditional insurance-based schemes (e.g. short-time week) (Natili *et al.*, 2022). The case of Indonesia is particular because an unemployment benefit (Jaminan Kehilangan Pekerjaan) was created and institutionalised for workers in the formal sector. The remaining policies implemented in Malaysia, the Philippines and Thailand are continuation policies of the policy reforms initiated in response to the economic crisis of 1998 (Yuda *et al.*, 2022).

Cluster 4: Proposals of necessary reforms evidenced by the pandemic

A large number of studies have highlighted the impact of the pandemic on different aspects of political systems and citizens. They have also evidenced the need to make

reforms in different social policy areas. The manuscripts in cluster 4 share a normative reflection on the various reforms that should be done due to the problems exposed in the research. There is not enough information, maybe because it was too early in the pandemic by the time authors wrote their articles, to know the reasons why these reforms have not yet materialised. We do not know if it is because of the balance of self-undermining and self-reinforcing mechanisms or the lack of emergence of permissive and/or productive conditions. The COVID crisis might have generated a critical juncture, and reforms might have been institutionalised in some of these cases. Still, the articles do not provide enough information to confirm this.

Chung (2022) set the case for a four-day week to reduce the societal costs of long-hour work culture. Also, the pandemic has provided lessons to strengthen universal and affordable health coverage and social protection systems (Akinleye *et al.*, 2020; Gaffney *et al.*, 2020; Bayarsaikhan *et al.*, 2022). In South Africa, the pandemic deepened the unequal treatment of different categories of non-citizens. However, Olivier and Govindjee (2021) provided some valuable guidelines on how the South African government can amend acts and regulations to include non-citizens (including asylum seekers, unaccompanied minors and other non-citizens in vulnerable positions) in current and future social assistance and labour market policies. The response from the EU is based on conditional finance support advocating investment (instead of austerity as before) using grants in combination with loans. However, national governments still have some leeway to present particular reforms (Bekker, 2021). Yuda *et al.* (2021) consider there is a need to incorporate the community in planning social policy reform decisions. They are fundamental alternative actors providing social policy by other means in the form of quarantine houses, ambulance units and food provision.

Discussion and Conclusion

What do we conclude about the nature of the institutionalisation of social policy responses to the pandemic? The systematic review undertaken in this article and the five articles included in this themed section provide insights to draw some conclusions.

Four clusters of social policy responses, as evidenced in the systematic review, indicate that critical juncture for policy change was unevenly opened in different countries in the context of COVID-19. The unevenness was not due to the varying severity of the impact of the pandemic; rather, permissive conditions and productive conditions of the welfare state in different countries hugely varied. However, we must explore even those cases where institutionalisation was weak because '... the quality of citizenship rests on the quality of institutionalisation' (Leisering, 2019: 56).

A broad pattern emerging from the systematic review is that only a few social policy responses are institutionalised.³ Path dependency could primarily explain this. In the systematic review, we have noticed cases of strong neo-liberal regimes exercising veto power regarding social policy reforms despite the COVID-19 challenge. Two articles included in this themed section (Leon *et al.*, 2021, and Ramia and Perrone, 2021) have taken a historical institutionalist approach to demonstrate this in three countries: Australia, Italy and Spain. For different reasons, long-term care in nursing homes was not embedded in welfare state arrangements in Italy and Spain. As a result of this structural residualism of residential care, when the COVID-19 crisis emerged, protective measures were carried out in hospitals only, which were recognised as institutions of care. A large number of

human lives were lost in nursing homes. This constraint of path dependency for specialised institutionalised adoption of policies of COVID-specific measures is pointing out another window for social policy to reinvent itself. The welfare state must explicitly recognise hybrid institutionalism (Abbott and Faude, 2022) in increasingly complex private-public partnerships for service delivery.

Compared to the case of Italy and Spain, where path dependency acted as a constraint, the Australian case shows the self-reinforcing mechanism of path dependency. Advocacy for increased social security was running before COVID-19 took place. Therefore, it was easier for the Australian government to abandon the neoliberal leanings to adopt a plan of Keynesian stimulus spending measures (see also Dukelow, 2021 for reforms due to the pandemic in Ireland that continued from the 2008 financial crisis).

Vulnerable social groups, marginalised within welfare state arrangements even before COVID-19, did not expect state relief measures to reach them. Therefore, community arrangements were resorted to. This is evidence of how permissive conditions were weak for institutional change. The case study of food banks as a safety net arrangement in the UK (Beck and Gwilym, 2022; included in this themed section) shows how institutionalising such societal response is antithetical to the welfare state goals. How far the state should directly provide, compared to being a facilitator, has been a long debate in welfare state literature. COVID-19 tested the state's capacity to provide relief measures and gain compliance from citizens for the quarantine measures. In such circumstances, extensive use of volunteerism is a testimony of limited state autonomy (Skocpol, 1992) in circumstances such as the COVID-19 pandemic.

A number of causal mechanisms that acted as productive conditions during the critical junctures can be identified in articles of cluster 3, where reforms were institutionalised. In the Netherlands, for example, COVID-19 measures were mounted on the changes that had been previously introduced to expand social protection for labour market outsiders (Natili *et al.*, 2022). In Indonesia, on the other hand, the institutionalised change benefited labour market insiders. However, processes of social policy expansion for outsiders have been adopted since the late 1990s, as well as in other South East Asian countries. In these cases, Yuda *et al.* (2022) highlight the importance of democratisation as an explanation for that expansion and of temporary COVID-19 programmes. It may have also played a role in institutionalising the Indonesian reform. In Spain, it seems that reforms were triggered by the severity of labour market dysfunctions and enabled by widespread agreement among political actors on the need to reduce the duality of social and employment protection. Indeed, all these cases show that expanding social protection for people who do not participate in formal labour markets seems to be a preoccupation for governments across different regions. In Visegrad countries, corporatist institutions appear to have influenced the development of the reforms, even if only indirectly or with significant limitations; such influence would prove the relevance of preserving institutionalised spaces to carry out negotiations between workers, employers and the state under democratic conditions. One last point to mention on the institutionalisation of changes is the importance of diffusion mechanisms, especially among European countries, and not only from supranational institutions but from policies of countries like Germany, whose short-time work scheme was mentioned as a model for several other countries.

Several suggestions for social policy reforms, as noted in the fourth cluster of the systematic review, are emerging from the issues of the non-recognition of a dysfunctional

aspect of society in the pre-pandemic scenario. These could be the non-inclusion of citizens in the institutionalised welfare programmes and the absence of legal protection for worker status, among others. Resilience in a time of crisis is required to address these shortcomings urgently. In other words, COVID-19 exposed the inadequacies of institutional structures for welfare outcomes. This recognition was higher in the Global South, where welfare institutions were weak. Thus, the need for an affordable healthcare system in Africa (Akinleye *et al.*, 2020) and the need to expand the social protection system in the Philippines and Thailand (Yuda *et al.*, 2021) became much more pronounced due to COVID-19 shock. Some of the patterns in responses we observe across different countries include the removal of conditionalities while providing welfare measures or cash transfers, normalisation of short-time work, and a support system for the active age population for unemployment.

Two articles included in this themed section (Cena and Dettano, 2022; Pearson *et al.*, 2022) showed how preferred paths of service delivery were not in alignment with the consciousness of collective welfare. The push for a personalised and consumerist model of care for disabled people in OECD countries came under strain and almost led to the breakdown of services for disabled persons during the lockdown. In other words, domiciliary care services were not recognised as an arrangement of collective welfare. A study of the experiences of waiting for the relief measure of Emergency Family Income (EFT) in Argentina (Cena and Dettano, 2022) serves as an important element of insights into how citizens interface with institutionalised practices. In other words, institutions often miss the ‘felt-need’ of the citizens. As a result, compliance with the norms specified by the institutional rules becomes difficult.

Apart from the attention we pay to national cases of institutional reforms undertaken or not undertaken within countries, we also need to pay close attention to studies with a subnational, regional (European Union) or global focus. A pandemic could not be fought within the boundaries of a nation-state. A stronger interventionist role of multilateral organisations, which are the institutional avenues for cooperation among nation-states, was acutely felt during the pandemic. Studies on vaccine inequality (Tatar *et al.*, 2022) have shown that countries are more polarised now than prior to the start of COVID-19. A stronger ideational level of global social policy, impacting the institutional structures, is needed, very much similar to the founding moment of the welfare state after World War II in post-pandemic contexts.

As expected, we must acknowledge some limitations. One of the limitations of systematic literature reviews has to do with the search strategy. The search strategy (e.g. selected keywords) might omit relevant publications from the analysis. Moreover, we could highlight three additional limitations of this research. First, the one mentioned above refers to the long time it takes for academic peer review articles to get published after finishing the first draft. Therefore, by using WoS and Scopus, we are analysing high-impact academic material at the cost of not having the most updated investigations. Second, by using WoS and Scopus, we exclude grey literature, books, and academic articles indexed in other databases. Third, the hegemony of English publications might produce biases in the information obtained, privileging authors from English-speaking countries or high-income countries with access to funds for translations and language revisions (Vera-Baceta *et al.*, 2019).⁴

Future research should systematically analyse particular factors that can affect the success or failure of social policy reforms institutionalisation (e.g. socio-economic and

political context, advocacy coalitions, governance arrangements, expectations and assumptions of stakeholders; World Bank, 2006; Cerna, 2013; Hudson *et al.*, 2019). Scholars should incorporate grey literature and analyse how timing matters (i.e. investigate if the timing of social policy reforms during waves 1, 2, 3 or other times might help us understand its institutionalisation success). Finally, there seems to be little research on policy learning (Dunlop *et al.*, 2018) during the COVID-19 crisis, which revealed the need for governments to learn fast under the pressures of severe shocks and critical junctures. The organisation of research agendas on learning modes that can lead to better and quicker identification of the nature of emerging social problems and the institutional and policy reforms needed to address them is necessary across the globe.

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Notes

1 The study of institutions has been at the centre of Political Science since its origins. The innovation of recent neo-institutionalist approaches resides in the dynamic role assigned to institutions' structural effects. The historical-institutional tradition parts from rational-public choice perspectives, which understand public action as the dependant variable of the interests of individual actors. On the contrary, early precursors of historical-institutional analysis like North and Ostrom began to argue that an inverse relation also exists and that institutional structures also mould the interests of actors, without assuming that the influence of institutions is determinant or unidirectional. The definitions and conceptualisations of institutions proposed by North and Ostrom are still widely cited in the literature. Fundamental for the understanding of the dynamism of institutional structures is the incorporation into political and policy analysis of the notion of 'ideas', instead or along the concept of 'interests', as stressed by constructivist approaches, and the effects that they may have on the decisions and actions of political agents (Cairney, 2012; Béland, 2019; Brinks *et al.*, 2020).

2 Nonetheless, as it is widely recognised, one of the limitations of systematic literature reviews is leaving relevant work out of the analysis (Egger *et al.*, 2001). Therefore, we consider the works analysed relevant but not necessarily exhaustive.

3 Institutional change takes time to materialise and can be gradual and incremental (Kingston and Caballero, 2009; Bakir and Aydin Gunduz, 2017). Social policy reforms face several obstacles to institutionalisation, such as veto points, feedback effects, path dependence or interest group mobilisation (Pierson, 1994). Our systematic review shows how the pandemic created the critical juncture for social policy reforms to be institutionalised in some cases. We should acknowledge a limitation: we are dealing with peer-reviewed academic publications here that mainly address social policy reforms during the first waves of the pandemic. As we know, academic publishing is slow; therefore, it is hard to find articles that can confirm the institutionalisation of social policy reforms. Nonetheless, we do so and find articles demonstrating this institutionalisation. However, this timing limitation of academic publications might distort the picture of the institutionalisation of reforms that could be bigger after revising grey literature or future academic publications.

4 Surprisingly, we found that the sample of countries analysed was more representative than we initially thought. Table 1 shows the countries examined in each of the articles. Western Europe dominates with fourteen articles, followed by Africa with six articles, Asia with five articles, North America with four, Latin America and Australia have two each, Middle East, Caucasus, and Central and East Asia have one each, and four of them do a global study.

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