

Research Agenda on Social Policy

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**Track 31 : Methodologies for Comparative
Social Policy Analysis: Past, Present, Future?**



Plan of the presentation (15')

1. Objectives of this project
2. Motivation
3. Methodology
4. A few results

1. Objectives of this project

A. To identify recent TRENDS & CLUSTERS in social policy research

(Literature from 2015-2019) ... What are scholars focusing on?

B. To develop A FIRST TAXONOMY for research in social policy

(SPL Classification) ... To aid in organizing knowledge.

2. Motivation for this research

For social policy, at present, economics can serve as an inspiration ... from an epistemological perspective.

JEL Classification System / EconLit Subject descriptors

“standard method of classifying scholarly literature in the field of economics”

“proxy to understand the transformation of economics science throughout the twentieth century”

1911-1990 (stabilized)

... and which *areas of research in social policy* scholars are focused on

<https://www.aeaweb.org/jel/guide/jel.php>

[\[History\]](#)

3. Methodology – What we did ...

Step 1. Objective: Get to top 10 journals with highest IF (CiteScore)

Generalist journals - to avoid the bias of including specialist ones

Search SCOPUS and Scimago with title containing: social+policy, social+issues, social+problem, social+welfare. Of 49, 22 no IF

Remaining 27: Read scope to exclude

- i) geographically restricted (2)
- ii) not relevant for social policy (4, sport, psychology, pol. sci.)
- iii) within social policy: specialists (6, sexuality, race, law, ...)

3. Methodology

Step 2. Objective: Extract Title, Abstract, Keywords, Year of issue, First author country to a database in STATA



5 year sample (2015-2019). Pre-COVID. Pre war in Europe. Pre 2023- recession?

Included special issues but excluded: intros to thematic issues and those from GSP's forum (invited texts, not peer reviewed, most have no abstract)

	Frequency
Journal of European Social Policy	154
Critical Social Policy	144
Global Social Policy	58
International Journal of Social Welfare	156
International Journal of Sociology and Social Policy	273
Journal of International and Comparative Social Policy	71
Journal of Social Policy	183
Social Policy and Administration	305
Social Policy and Society	219
Social Problems	141
Total	1,704

3. Methodology

Step 3. Objective: Construct a new variable in the database - THEME

Colleague with more expertise in SP read each Title, Abstract and Keywords and manually attributed a Theme (1704 articles!)

Step 4. Objective: Get to a Human Intelligence Taxonomy (HIT) ...

... precursor to SPL Classification (later!). Senior colleague used Thematic Content Analysis (confirmed by the other 2 colleagues) to hierarchically group Themes into Main Categories (A..M) and Subcategories (A01..M06)

Step 5. Objective: Use the HIT to codify (A01..M06) each article

Of the 1704, 710 have a single Theme and 994 were given two.
So, sample was expanded to $710 + 994 * 2 = 2698$ research articles

3. Methodology

To fulfil Objective A:

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To analyse recent SP research and determine underlying trends and clusters

For each of the 2698 articles in the 2015-2019 sample, we used

Year of issue (YOI),

First author country (FAC), and the

Taxonomical bins (A01..M06)

3. Methodology



To fulfil Objective B:

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To develop a first taxonomy for research in SP (SPL Classification)

Step 6. Objective: Use AI on Abstract and Keywords of a bin to determine Clusters that we can compare with the Themes that were manually proposed

(We chose top 7 clusters by Size*Score; mode: Topic Modelling; stopwords: purpose, design, methodology, approach, findings, originality, value, examines, article, research, limitations, social policy)

MeaningCloud is an Excel-friendly TEXT CLUSTERING Algorithm

- * Serves to validate Step 5 - were the bins correctly attributed?
- * Serves to finetune the Themes into more definitive subcategories

3. Methodology: A silly example

An Example of what MeaningCloud adds to the analysis

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Imagine we have articles on: apple, mango, orange, banana, salmon, sardines, cod.

We hire my colleague with human intelligence to classify the texts and she comes up with:

Fruit:	apple, mango, orange
Fish:	salmon, sardines

We then submit the same texts to MeaningCloud (the AI classifier) that ADDS banana to the list of fruit, and ADDS cod to the list of fish

>> This allows a more complete list. Useful for future texts.

4. A few results



A. Recent TRENDS & CLUSTERS in social policy research

B. A FIRST TAXONOMY for research in social policy

Before we start, please point your mobile to shorturl.at/fkpt7

4.A – Trends and clusters in SP research

FAC	2015	2016	2017	2018	2019	Total	% of total
United Kingdom	166	138	194	154	144	796	30%
USA	62	81	54	53	64	314	12%
Germany	32	21	36	28	37	154	6%
Australia	14	28	33	26	21	122	5%
Sweden	22	23	21	34	16	116	4%
Canada	18	26	21	19	30	114	4%
Italy	11	14	21	26	24	96	4%
Finland	16	21	13	21	22	93	3%
Netherlands	10	8	20	20	22	80	3%
Norway	6	11	17	21	22	77	3%
Rest of the world	123	105	119	199	190	736	27%
<i>Total</i>	480	476	549	601	592	2698	100%

Top 10 countries by First Author (FAC) ... the usual suspects!

4.A – Trends and clusters in SP research

	Change from 2015-2017 to 2017-2019
Hong Kong	227%
Belgium	219%
Portugal	200%
Spain	150%
Switzerland	136%
Pakistan	100%
United Arab Emirates	100%
South Africa	83%
Czech Republic	83%
India	80%

‘New kids on the block’

4.A – Trends and clusters in SP research

Ranking	2015	2016	2017	2018	2019	2015-2019
1	United Kingdom	United Kingdom	United Kingdom	United Kingdom	United Kingdom	United Kingdom
2	USA	USA	USA	USA	USA	USA
3	Germany	Australia	Germany	Sweden	Germany	Germany
4	Sweden	Canada	Australia	Germany	Canada	Australia
5	Canada	Sweden	Canada	Australia	Italy	Sweden
6	Finland	Germany	Sweden	Italy	Norway	Canada
7	Australia	Finland	Italy	Norway	Finland	Italy
8	Denmark	Israel	Netherlands	Finland	Netherlands	Finland
9	Austria	Italy	Israel	Belgium	Australia	Netherlands
10	Italy	Norway	Norway	Netherlands	Belgium	Norway

How the Top 10 ranking changed over time ... Italy and Norway rising, while Australia falling behind

4.A – Trends and clusters in SP research

FAC	CSP	GSP	IJSSP	IJSW	JESP	JICSP	JSP	SP	SPA	SPS	Total
United Kingdom	124	18	78	11	23	39	136	1	139	227	796
USA	7	3	43	37	13	8	3	174	14	12	314
Germany	6	7	20	15	57	5	15	2	20	7	154
Australia	14	7	20	4	5		18	1	27	26	122
Sweden	4	6	12	21	23	4	9		27	10	116
Canada	8	15	22	10	8	9	6	11	19	6	114
Italy		2	28	6	19	2	7		30	2	96
Finland	11	2	33	10	9	3	3		14	8	93
Netherlands	2	6	10	5	10	1	9		30	7	80
Norway			3	15	8	3	19	2	16	11	77

In which journals do the Top 10 publish?

4.A – Trends and clusters in SP research

FAC	CSP	GSP	IJSSP	IJSW	JESP	JICSP	JSP	SP	SPA	SPS	Total
Hong Kong	1		6	12	2	2	2	1	16		42
Belgium	4	2	6	13	10		3	2	15	2	57
Portugal		1	3	2	2	2			6	6	22
Spain		2	4	4	10	1	6		4	2	33
Switzerland	2		6	6	12	1	2	2	3		34
Pakistan			3								3
United Arab Emirates		1	2								3
South Africa	11	7	7	3	1		4				33
Czech Republic			3	2	8				3		16
India		2	20						4		26
										10%	269

In which journals do the New Kids on the Block publish?

4.A – Trends and clusters in SP research

FAC	A	B	C	D	E	F	G	H	I	J	K	L	M	Total
United Kingdom	52	1	81	3	52	389	90	4	13	16	25	28	2	756
USA	28	5	44	6	17	144	11	12	16	2	22	4	3	314
Germany	15		3	1	6	86	19	10	1	7	3	3		154
Australia	1	2	10	1	4	69	12	7	3	2	4	7		122
Sweden	7		8	1	5	81	10	1			2	1		116
Canada	5	1	12		8	47	6	9	3	8	4	9	2	114
Italy	2		7	1	10	53	13	8			2			96
Finland	6	2	4		4	45	16	11	1	1	2	1		93
Netherlands	7		4		5	44	7	5	1	3	1	3		80
Norway	4		4		5	44	8	3	3	1	4		1	77

Top 3 main categories per Top 10 country ... Where is the action?

4.A – Trends and clusters in SP research

Top 10 by FAC:

1st tier

C - Sociological dimensions of social policy

F - Sectoral social policies, social services
and organizational arrangements

G - Welfare states and welfare regimes:
dynamics, crisis and reconfigurations

2nd tier

A - Historical, political, and institutional
context of social policy

E - Governance, welfare market, and policy-making
process

H - Economic and fiscal dimensions of social policy

4.A – Trends and clusters in SP research

Social policy research portfolio

FAC	A	B	C	D	E	F	G	H	I	J	K	L	M
United Kingdom	7%	0%	11%	0%	7%	51%	12%	1%	2%	2%	3%	4%	0%
USA	9%	2%	14%	2%	5%	46%	4%	4%	5%	1%	7%	1%	1%
Germany	10%	0%	2%	1%	4%	56%	12%	6%	1%	5%	2%	2%	0%
Australia	1%	2%	8%	1%	3%	57%	10%	6%	2%	2%	3%	6%	0%
Sweden	6%	0%	7%	1%	4%	70%	9%	1%	0%	0%	2%	1%	0%
Canada	4%	1%	11%	0%	7%	41%	5%	8%	3%	7%	4%	8%	2%
Italy	2%	0%	7%	1%	10%	55%	14%	8%	0%	0%	2%	0%	0%
Finland	6%	2%	4%	0%	4%	48%	17%	12%	1%	1%	2%	1%	0%
Netherlands	9%	0%	5%	0%	6%	55%	9%	6%	1%	4%	1%	4%	0%
Norway	5%	0%	5%	0%	6%	57%	10%	4%	4%	1%	5%	0%	1%

Top 3 main categories per Top 10 country ... Same information as before but %.
Some countries concentrate efforts; others like Canada and the Netherlands don't.

4.A – Trends and clusters in SP research

FAC	C01	C02	C03	C04
Australia		3	4	3
Canada	1	6		5
Finland		3	1	
Germany		3		
Italy	2	4		1
Netherlands	2	2		
Norway		2	1	1
Sweden		6	1	1
USA	2	15	2	25
United Kingdom	5	48	7	21
<i>Crit. >= 5</i>	12	92	16	57
	7%	52%	9%	32%

C02 Poverty, C04 Vulnerable groups, minorities and marginalised groups, race/ethnicity policy

4.A – Trends and clusters in SP research

FAC	F01	F02	F03	F04	F05	F06	F07	F08	F09	F10	F11	F12	F13	F14
Australia		8	3	6	8		19	4	8	5	2		5	1
Canada	1		1	3	1	2	9	4	9	1	5	5	5	1
Finland		5	4	3	1		15	9	1		1		6	
Germany		4	4	6		6	39	7	5	2	6		7	
Italy		4	11	1		1	19	6	2	1	4		4	
Netherlands			4	3			20	1	1	2	11		2	
Norway		4	3	4	1		16	5	4		2	1	4	
Sweden	1	7	10	7	1	3	15	11	12		7		7	
USA		4	6	15	1	9	17	12	20	2	27	18	7	6
United Kingdom	4	23	25	29	13	18	74	51	43	14	29	12	44	10
<i>Crit. >= 5</i>	6	59	71	77	26	39	243	110	105	27	94	36	91	18
	1%	6%	7%	8%	3%	4%	24%	11%	10%	3%	9%	4%	9%	2%

4.A – Trends and clusters in SP research

FAC	G01	G02	G03	G04
Australia	1	3	2	6
Canada			2	4
Finland	5	2	2	7
Germany	4	1	2	12
Italy	5			8
Netherlands	2	1	2	2
Norway	1		1	6
Sweden	2	1	2	5
USA	1	1	1	8
United Kingdom	36	7	7	40
<i>Crit. >= 5</i>	57	16	21	98
	30%	8%	11%	51%

4.A – Trends and clusters in SP research

2nd tier:

FAC	A01	A02	A03	A04	A05
Australia	1				
Canada	1		3		1
Finland	1		4		1
Germany	2		10		3
Italy			2		
Netherlands			6		1
Norway			4		
Sweden	2		3		2
USA	20		6	1	1
United Kingdom	9	19	20	1	3
<i>Crit. >= 5</i>	36	19	58	2	12
	28%	15%	46%	2%	9%

4.A – Trends and clusters in SP research

FAC	E01	E02	E03	E04
Australia	2		1	1
Canada		2	5	1
Finland	2	1		1
Germany	2	3	1	
Italy	2	6	1	1
Netherlands	1		1	3
Norway	4			1
Sweden	1	1	2	1
USA	3	9	1	4
United Kingdom	20	11	6	15
<i>Crit. >= 5</i>	37	33	18	28
	32%	28%	16%	24%

4.A – Trends and clusters in SP research

FAC	H01	H02	H03	H04	H05	H06
Australia	4		2	1		
Canada		2	4	2	1	
Finland		1	7	3		
Germany	1	1	1	4	3	
Italy			2	4	2	
Netherlands			1	4		
Norway			1	1	1	
Sweden				1		
USA	2		3	3	2	2
United Kingdom	11	8	11	10	4	
<i>Crit. >= 5</i>	18	12	32	33	13	2
	16%	11%	29%	30%	12%	2%

4.A – Trends and clusters in SP research

	YOI				
	2015	2016	2017	2018	2019
A	26	27	28	46	36
B		6		3	3
C	57	40	50	45	62
D	5	4	4	3	9
E	29	28	31	38	29
F	237	245	296	286	293
G	53	43	57	72	50
H	22	25	35	45	45
I	1	19	14	8	12
J	18	6	5	12	11
K	20	9	16	30	26
L	10	20	13	11	14
M	2	4		2	2

4.A – Trends and clusters in SP research

	2017-2019/2015-2017	#19			2017-2019/2015-2017	#19			2017-2019/2015-2017	#19	
A01	-40%	8	*	F03	63%	28	**	H05	15%	4	
A02	-37%	4		F04	28%	31	**	H06	0%	1	
A03	91%	23	**	F05	5%	4		H08	0%		
A04	100%			F06	3%	9		I01	125%	6	
A05	14%	1		F07	22%	75	**	I02	-62%	5	*
B01	-38%	2		F08	0%	27		I03			
B02	-50%	1		F09	21%	25	**	I04	-59%	1	
C01	-33%	2		F10	-30%	5		J01	-3%	11	
C02	-19%	26	**	F11	4%	26		K01	91%	24	**
C03	109%	13	*	F12	-11%	10		K02	-50%	2	
C04	58%	21	**	F13	1%	30		L01	-12%	14	*
D01	-6%	3		F14	-8%	4		M01	0%		
D02	0%	1		G01	9%	9		M03			
D03	200%	5		G02	18%	4		M04			
E01	38%	11	*	G03	73%	8		M05	0%		
E02	0%	5		G04	11%	29	*	M06			
E03	8%	5		H01	31%	5		M07	0%	1	
E04	4%	8		H02	114%	5		M09		1	
F01	-10%	2		H03	46%	18	**				
F02	9%	17	*	H04	78%	12	*				

Crit. >= 50%
 Crit. <= -50%

Crit. >= 10 articles in 2019 and light green

4.A – Trends and clusters in SP research

Growing:

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A03, Citizenship, public opinion / public attitudes

C04, Vulnerable groups, minorities and marginalized groups, race / ethnicity policy

F03, Care

F04, Children and adolescents

F07, Employment, work, labour and unemployment

F09, Health and disease / sickness

H03, Income

K01, Gender issues

*

C03, Social inclusion / social exclusion

E01, Governance, collaboration, and co-production

F02, Ageing

G04, Welfare states

H04, Pensions

Shrinking:

**

C02, Poverty

*

A01, Historical, political, and institutional context of social policy

I02, Environmental policy and sustainability

L01, Social policy theory / research

4.B – A first taxonomy in SP research

We almost don't need this slide ... if you opened the QR code and have been following along!

Social Policy Literature (SPL) Classification

A First Taxonomy Developed with Human and Artificial Intelligence

Fernando Serra, Maria João Bárrios & Pedro G. Rodrigues¹

V2. September 11, 2022

A Historical, political, and institutional context of social policy

A01 Activism and social movements

activisms (digital, formal, individualized freelance, informal social, political), anarchism, anti-systemic movements, civil rights, civilizing processes, collective action, practices of resistance, counter-conduct, protest, protest policing, repression, revolutionary groups, role of emotions, social movements

Next steps ...

An ESPANET-wide project:

We'd like your help ...

... to improve upon the taxonomy (SPL Classification)

... taking advantage of the wisdom of (experienced) crowds

Towards a more efficient organization of scarce resources
allocated to research in social policy issues and problems

Thanks for your attention!

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