

Report from the Laboratories: 21st century India, the Nordic/Scandinavian Welfare State Model of Alva and Gunnar Myrdal – and its aftermath

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Abstract

Without any prior experience of India except armchair travelling – knowledge obtained from the world wide web, by reading books, serious journals and mainstream newspapers, looking at television programs, broadcast listening etc. – analytically it is a challenge to establish links between this huge country/subcontinent and its public welfare ambitions, and similar attempts during the 20th century in the small states of the Far North of Europe. However, already in the 1950s two Scandinavian welfare state architects – the future Nobel Laureates Alva and Gunnar Myrdal – were very active in India at a time when the young post-colonial state developed the foundations for later developments in this field of social action. Today, during the second decade of the first century of the Third Millennium, though partly in the shadow of China also re-born India – the world's largest democracy and one of its most prospering economies – has returned to the global centre of interest to politicians, pundits and students of the social sciences as has the rejuvenated “Nordic Welfare Model” of an otherwise self-congratulatory “Social Europe”. The parallel biographies of the Indian and the Scandinavian welfare states will be discussed taking as a starting point not only the Myrdals but also the first major cross-national comparative welfare state study with quantifying figures dating back to 1966. Current challenges to the interdependencies between citizenship, states and welfare are scrutinized within the framework of three consecutive “generations” of comparative welfare state research and its implication for the relationship between the new BRIC/BIC/BASIC-countries and the old Far North of Europe (“Norden”).

Rough Draft. Do not quote without permission of the author. Preliminary notes on “India” to be altered, or deleted.

... the Western world has not yet become prepared to accept the underdeveloped nations as equals, having the right to look at their own national lives in the same way as Western nations look on theirs. As always in relations, where there is not a genuinely established basis of equality, those who have the upper hand are not consciously aware of their discriminatory way of thinking. There is a beam in our eye. I believe that the common man in the Western world, the worker and the farmers well as the rich shareholder in one of the enclave corporations, is most seriously and honestly convinced that the underdeveloped nations and their leaders – and even such an exquisitely cultivated man like Jawaharlal Nehru and a pious man like U Nu – are doing him grave injustice, when they accuse him of lingering inclinations towards an imperialist and colonial way of thinking. But of course, as a matter of plain facts, underdeveloped nations and their leaders are correct.

Gunnar Myrdal (1960): *Beyond the Welfare State* p. 262-3

Introduction: Towards India

In the first decade of the third Millennium India has become a major destination not least for curious and entrepreneurial Westerners including professional academics. For instance, in late February 2010 the Coordinating Committee for Nordic Studies Abroad set sail for a visit to two institutions of higher learning, the Jawaharlal Nehru University, Delhi, and the University of Hyderabad. In addition, five Nordic historians and social scientist had, at rather short notice, been taken onboard.¹ The day before leaving Scandinavia, when the draft of this paper already had been emailed to the local organizer of these meetings, the Nordic Centre in Delhi, I came across an article on one of my favourite internet sites entitled “Reimagining democracy – India more than counts”. The subtitle was “The founder of openDemocracy on a mind-changing trip to India” (Barnett 2010; cf. also Chaudhuri 2006). Indeed, preparing for this sojourn was mind challenging, the trip definitely also mind changing. In addition to Europe and the North, my previous experience was confined to comparative welfare state

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research on the East- and South-East Asian countries, not the world of citizenship and welfare in South Asia. Before leaving Scandinavia, only in brief moments of preparation and scrutiny have I been able to venture into this uncharted terrain.

Let me without further ado address the chosen subject: the welfare state with its Nordic Model. The parallel biographies of the Indian and the Scandinavian welfare states will be discussed taking as a starting point not only the Myrdals of the title of this paper but also the first major cross-national comparative welfare state study with quantifying figures dating back to 1966, and its sequels. I start out with a quotation, at the top of the first page: in 1960, a book titled *Beyond the Welfare State* was published in English. I almost take for granted that its author, Gunnar Myrdal, is the most well-known Swedish social scientist in India, especially in view of another of his works, *Asian Drama* (1968). Being a Scandinavian or Swedish sociologist, I may be wrong, and Google Scholar would probably prove me wrong these days. But I am pretty sure that among the somewhat older generation of Indian social scientists both Gunnar Myrdal and Alva, his wife, collaborator, colleague, gender equality expert and a Swedish ambassador to India in the late 1950s, are still remembered. The Myrdals, both later Nobel laureates (Memorial Prize for Economics and Peace respectively), belonged to a generation of mid-20th century social scientists and public policy advocates formed by the devastating experience of the First Great War in Europe, eagerly engaged in designing grand schemes for remaking human society during the interwar period, and in fact throughout the Second World War – though this was primarily confined to the United States. In the post-war era they were still in positions to implement or investigate the implementations of previous proposals. Thus, they belonged to an international social policy intelligentsia; intellectuals who inspired the development of the welfare state and social planning not only in their vicinity but in other places as well (Appelqvist & Andersson 2004; Ekerwald 2001 & 2000; Eliasson 2000). Furthermore, there is a pervasive legend to the effect that while Gunnar Myrdal was presenting *Asian Drama* using his own country as an example, an Indian social scientist in the audience commented: “But Sweden... that is not a country. It is a laboratory”. This is, of course, why “the laboratories” are part of the title of this paper.

Where do these countries and social experiments stand in 2010 in terms of welfare state development? Where are these dramas played out today? Looking back along the river of time, from the late 1960s onwards, and in particular from the early 1980s with the advent of Reagan and Thatcher regimes in the US and UK, and furthered a decade later by the

implosion of the Western part of the Second World, the Soviet bloc, a return to 19th century Manchester ideals and norms this time emanating from Chicago now in full blossom from Shanghai to Mumbai became most obvious among academic professionals and professional academics in this field of social action. No doubt India, its academic credentials, consumer and celebrity culture, and new trading markets belong to this brave new globalized world. Stressing this from the start is a way of undoing the trap inherent in an undertaking that renders these notes merely provisional. In the wake of this “cultural turnabout” some seeds from a slightly older world of thoughts on citizenship and welfare have remained as will be discussed in the pages to come. Reservations aside (cf. Anderson 2009), this is where the Scandinavian laboratory – the “Nordic Model” – fits into a wider analysis of the concept of a “Social Europe” in the present global drama.

Citizenship, states and welfare – towards a singular modernity

Once (upon a pre-modern time) subjects of kings, queens and other feudal ladies, landowning squires and religious authorities, today’s modern individual female and male *citizens* belong to rather well-defined communities under the nation-state umbrella: bonded humans set free to buy and sell labour power and other commodities in competitive yet in some way regulated markets, and to organize, mobilise and express their concerns, identities and voices through the rule of law and various public institutions. They are even allowed to exit such institutions as legal residents within defined geopolitical borders. Exit is one thing, entrance another. To enter the territory of another country is an enterprise of an entirely different order. Also, mutual dependency, loyalty and individuality have their obvious limits. States are still sovereign and supreme organizations that reflect the distribution of power within particular territories where their machinery exerts coercive control and political authority in order to extract resources from those living within their boundaries, whether citizens or subjects, whether rural or urban. Not to speak of human beings from outside.

Welfare intersecting with citizens not only equates with individual welfare – human lives in decency and dignity, or its dialectical reverse, as well as more or less formalized and institutionalized citizenship rights or entitlements and their obverse, obligations. It also encapsulates social welfare, the well-being of society as a whole, including its human component, whether national or imperial, and the allocation of resources following the social

patterning of modern society. Thus, in the state- and nation-building biography the merger of welfare and state is of late date, and the notion of welfare is still not self-evident to the same extent as a judicially and territorially defined state. Philologically, to invoke the name of an academic discipline currently in disgrace, welfare has different connotations in Europe than in North America, and these two continental significations have been in uneven competition in the age of the present Empire. Even compassionate conservatives commonly complain that the welfare state punishes the diligent citizen and rewards the idle, while it transforms everyone into subservient taxpayers and dependent clients of government. On the other hand, progressives of various persuasions, nationality and/or cosmopolitanism most often argue in favour of state intervention as a means of reducing insecurity and poverty, and achieving equality and social justice though there is a still rather vague “third way” advocating the common cause and strength of communality and reciprocity between peoples within institutional reach of each other, a conception recently parachuted to the status of exact science in memory of Alfred Nobel (eg. Ostrom 1990).

Thus, welfare lies anywhere along a scale between “fare well” to “misfortune” (fare bad), and its derogatory appendix: “welfare and such welfare” (Williams 1976:332). Despite the fact that “to... promote the general Welfare” is listed in the Preamble of the Constitution as one of the six fundamental purposes of the government of the United States, where the implication of welfare is closely allied to institutionalized help for the poor, and only the poor as a select target group whether deserving or undeserving (“welfare queens”, “white trash” etc.). In Western Europe, on the other hand, welfare denotes institutionalized support to the population at-large, or the workforce in a broad sense. Hence, it is no coincidence that the broadest definition of the welfare state is European though formulated with a certain British-English, even Fabian, accent (Briggs 1961:223):

... is a state in which organized power is deliberately used (through politics and administration) in an effort to modify the play of the market forces in at least three directions – first, by guaranteeing individuals and families a minimum income irrespective of the market value of their work or their property; second, by narrowing the extent of insecurity by enabling individuals and families to meet certain ‘social contingencies’ (for example, sickness, old age and unemployment) which lead otherwise to individual and family crisis and third, by ensuring that all citizens without distinction of status or class are offered the best standards available in relation to certain agreed range of social services.

I am sure this comes as no surprise to someone brought up in post-colonial, secular India and well aware of British culture. Of course, I am not in a position to comment on the Indian discourse, or the related social research being conducted here, or whether or not Myrdal contributed to this field. This Northern nexus is nonetheless the starting point of *comparative welfare state research* within history and the social sciences, a fairly recent branch of social research focused on social policy. This project, which has yet to reach out to the present world beyond the North/West, can be divided diachronically into three consecutive periods or generations of research, and synchronically into a diverse set of subheadings depending on, for instance, disciplinary orientation and scholarly imagination (cf Leibfried & Mau 2008). These three “generational shifts” will structure these notional and factual considerations concerning the engagement between citizenship and welfare, and between India and Scandinavia; (the latter receiving special attention where possible and necessary, an ambition so far unfulfilled; see also footnote 2 below).

The first generation of welfare state studies and its research objects

While the etymology of welfare reflects the different paths of institutionalized support in Western Europe and North America – with Imperial Britain or “Ukania” (Nairn 1989; cf also Anderson 1998) somewhere in between – the continental European welfare state grew out of conscious institutional and political efforts to minimize the ascendancy of the working class movement, in particular in Germany – the Social Policies/Politics of the State (*Sozialpolitik* and *Sozialstaat*). In 1870-71, the victorious nation-builder chancellor Otto von Bismarck, and his counsellors, were able to see the strengths of defeated France, its mutualities or friendly societies (social insurance institutions, in France later *l’Etat Providence*). For a year or so, Prussia occupied France, stole many of its grand projects, made them even more magnificent, and established them as part of the Wilhelmine Second Reich (Clark 2007). A modified, adapted form of this workerist social model – which in Germany was not citizenship-based – was adopted in neighbouring Scandinavia early on and reached as far as Imperial Japan. Across the political spectrum from right to left the proponents of social insurance mustered strength and injected inspiration. For Bismarck, the organizational features of the French voluntary institutions became role models for top-down compulsory, risk preventing state agencies (Baldwin 1990). Below, within the European working class movement industrial safety – labour inspectorates – and occupational injury insurance came first. From this time

onwards, social insurance programs – industrial injury, sickness and old age pensions – emerged across Europe and became a major topic among state administrators and policy makers in Berlin as well as Vienna, St. Petersburg, Rome and back again in Paris. In London, state support for unemployment insurance gained prominence through the efforts of, for instance, William Beveridge, among others. In the far north of Europe, too, particularly in Denmark, this type of institutional set-up saw the light of day and was soon enlarged, both towards the citizenship approach, and into related policy areas such as housing, medical care and education. Intertwined with the above-mentioned social insurance programs, it was later to form basis of the reputation of the Scandinavian or Nordic welfare model. During the first half of the 20th century social insurance institutions spread around the world, at first glance fairly randomly from Australia to Uruguay. By 1921 the International Social Security Association (ISSA) was founded with headquarters in Geneva adjacent to the International Labour Organization.

Although the first Scandinavian steps were taken at a time when Bismarck was still at the helm, the outcome was “Beveridgean” though Sir William was still in his infancy, or a young advocate of far-reaching industrial welfare schemes, unemployment insurance in particular. At the end of the 19th and beginning of the 20th century new Danish and Swedish old-age pension schemes were more or less universal in what were still rather agrarian, even poor, societies. Actually, long before this, education had been advanced under the firm control of slowly declining state churches which gave way to new secular public authorities that had already begun to establish public health clinics and hospitals – the forerunners of a universal medical care system. Norway in western Scandinavia should be included in this pattern while Finland, a part of Tzarist Russia and in the East in institutional terms, albeit still influenced by its Western heritage, lagged behind somewhat.

Throughout Scandinavia, the new social movements soon in government, again with Finland slowly following suit, opted for a mix of democracy and welfare, tax-financed social citizenship obligations and rights, and public provisions of social services. Under the auspices of imaginative political and social reformers such as Myrdal’s mentor Gustav Möller, domestically a leading figure in the party of the Second International, Alva and Gunnar Myrdal published their path-breaking *Crisis in the Population Question* (1934; in Swedish). With increasing popular mobilization, economic prosperity and state capacity, public social programs gradually expanded after the Second World War to reach their climax in the 1970s,

and, especially in the case of Finland, even far into the 1980s. Meanwhile, Denmark had already experienced a tax revolt (welfare backlash) in the early 1970s, before partially recovering as a somewhat pruned Scandinavian-style neoliberal-conservative welfare state at the end of this period (Christiansen et al 2006; cf. also Alestalo et al 2010 and Hilton 2008). At its height, the Nordic Model – particularly in Finland and Sweden – was severely hit by the arrival of new times. Oil-rich Norway was the clear exception. Below, I will return to what some observers have described as a rapid downhill trip.

Leaving aside Scandinavia for a moment in our global search for the lineages of the national universal welfare state, such more or less comprehensive social policies were imported from the periphery of New Zealand and recast at the centre of the British Empire – the Beveridgean welfare state of T H Marshall and Richard Titmuss and its citizenship model – at a time when state organized social protection not only for soldiers but also for mothers and workers was making decisive inroads in North America with FDR’s New Deal (Skocpol 1995). In Joseph Schumpeter’s words (1943), and conflictual world, capitalism, socialism and democracy went hand in hand. In the US of the late 1930s, however, social insurance was renamed social security, a concept which has become the trademark of social protection for workers and other employees and their families throughout the non-colonial world in particular. Under the heading of social security, five branches – (1) occupational injury insurance, (2) old age pension, (3) sickness and maternity benefits, and (4) unemployment insurances and finally (5) a fairly loose set of family support including general child allowance – were lumped together into a more or less coherent universalist whole (SSPTW 1939 onwards; various editions). These were serialised by social researcher into successive “stages” or sequences of welfare state development also including more preventive and pro-active measures. Thus, from its inception the idea of the (national) welfare state has oscillated between a more comprehensive, or universal approach on the other hand, and – to a varying degree – a selective social safety net approach on the other, featuring in some cases poor relief (welfare handouts) and a recent euphemism, also in the former First World, anti-poverty programs.

This artefact was to succeed in the first world of the post-war era more or less in full – North-Western Europe – or sometimes only partially (in the latter case, for instance, the US with no compulsory health insurance and no universal child allowance program). Social security also became a distinctive feature of the social system of the second (communist) world, where the right to a job at least in theory, and in particular for males, made unemployment insurance

unnecessary (Aidukaite 2004). In the shadow of the Soviet Union, from 1951 onwards the People's Republic of China also developed a social safety system though with a certain rural twist: the rice bowl. With the advent of Cold War and competition between the two worlds, capitalism and socialism, the developing third world became fertile soil for the proponents of social security although success was often more limited there than in the more advanced parts of the world. The Indian province of Kerala has, however, often been mentioned as an early example of public welfare institution-building (cf Aspalter 2003 and Heller 1997; also Blomkvist 1988). Later on, a more amicable convergence between these two societal models was conceived, in which "economic growth is the ultimate cause of welfare state development" partly explaining the absence of India in the "industrialisation paradigm" (Wilensky 1975:24).

Thus, the patterning of the worldwide growth of social insurance or social security institutions became the successful object of Harold Wilensky's pioneering study *The Welfare State and Equality – Structural and Ideological Roots of Public Expenditure* (1975), the foremost example of the first generation of welfare state studies in which legacy this author comprises Myrdal's *Beyond the Welfare State*. Simultaneously Wilensky included the rest of the operations of the Washington-based HEW (Department of Health, Education and Welfare of the Federal Administration) in his international data set which consisted of 1966 national social and military expenditure and GDP figures in particular. Thus, from the start, empirical comparative welfare state research has been fairly global though it never went into the communalities and details of the more peripheral national welfare state types. *The Welfare State and Equality* spanned over all five continents (though China was represented by the ROC, i.e. Taiwan) and included data on social spending and social welfare programs in 64 countries from Australia – with its subjects of the British Queen – to newly independent post-colonial Zambia with its free citizens, a member of the Commonwealth.

The research object(s) of the second generation WS studies

Wilensky's sample, which started out with 64 countries, was narrowed down and focused on the 22 most advanced states. The latter included the core West and North European countries, Israel, Canada and the US in North America, three East European countries (Czechoslovakia, Poland and Hungary), and Australia and New Zealand in the Pacific. Japan was number 23 on

the list. Thus, this was the geography of the world's advanced welfare states in 1966 – minus Japan. In analytical terms, Wilensky made a distinction between four types of welfare states: democratic (31 countries with India at the end of the premier league - W1975:138 table 8), totalitarian (8 countries; the Soviet bloc plus Yugoslavia but not the People's Republic of China), authoritarian oligarchic countries including Taiwan (17) and authoritarian populist states (8). The last two types were not really part of his analysis, and very little was said about the differences between the first two apart from their most obvious Cold War aspects. On the one hand, Wilensky stressed the similarity, or convergence, of the core welfare states. This was the time of the disarmament agreements including Helsinki (human rights) and détente between West and East. On the other hand these countries differed in their organization of benefits and services, not to speak of levels of spending. In 1966, the United States ranked top in GDP/capita, closely followed by Sweden, Iceland, Switzerland and Canada. Upper Volta, Burma, India, Pakistan and Cameroon finished in the bottom five of the 64 country league; regrouped by social security spending as a percentage of GDP Austria would have come top in 1966 (21%) joined by the Federal Republic of Germany, France, the Netherlands, with Italy, Luxemburg and Sweden sharing the fifth position (17.5%), while Pakistan (0.6%), Syria (1.0%), Honduras (1.1%), Burma (1.1%) and Iraq (1.2 %) made up the bottom group with a slightly higher figure for India (1.4%) (Wilensky 1975:122-24). It is no coincidence that the sequel, published thirty-six years later, was entitled *Rich Democracies* (2002). Again the bottom group was left outside the parameters (when the figure for India has reached 1.7%).

The European reaction against this North American analysis was intense. Indeed it was challenged by a considerable number of scholars in particular from West German and Scandinavian universities and research institutes (i.e. Flora & Heidenheimer 1981). Social expenditure figures did not say much about welfare state developments was the argument. Decommodification, originally launched by Claus Offe, was proposed, indexed and popularized as an alternative analytical starting-point with Gösta Esping-Andersen seminal *The Three Worlds of Welfare Capitalism* (1990), a work which in many ways summarized the research which had followed in the wake of Wilensky. The most widely read example of the second generation of comparative welfare state research, in which the conventional sample had shrunk to eighteen or fewer Western countries. Japan was included, Israel gone and, most important, Eastern European countries, or the totalitarian type, had completely disappeared as had the rest of the world including Gandhi's India.

Thus, Western mass democracy – the development of suffrage and electoral strength in particular – had become a key indicator in the selection of research objects although also the decline in social development in Eastern Europe and parts of the third world should not be forgotten. Instead of convergence, differences among the Western welfare states were emphasised, in particular among those who followed fairly closely in the steps of Esping-Andersen (Arts & Gelissen 2002). Against the Anglo-Saxon liberal male welfare breadwinner model, UK and US, with the latter's color of welfare in particular, and thus, no (heuristic) model at all, entered two other welfare regimes and their expansions. On the one hand the hierarchical and stratified continental or Conservative traditional family oriented welfare state, in West Germany in particular, and on the other the archetypical welfare state, the egalitarian and women-friendly Scandinavian or social-democratic model with its state feminist gender equality approach (i.e. Lewis 1993). Early on a fourth Lib-Lab model was on the table. This was followed by a special Southern European model – a second class version of the Conservative-continental, and, a few years into the 1990s, by a no longer a structural or totalitarian but a post-socialist model in Central and Eastern Europe (Aidukaite 2009). This model-building with 18 cases or less ended up in five different model regimes with an “encompassing model” representing the ultimate welfare state. So far it was the most elaborate version from the dataset focusing on welfare coverage, redistribution and citizenship rights created in Stockholm, Sweden, by Walter Korpi, and collected by him and his many collaborators over three decades. In this world of models and regimes types, Japan was always an outlier, however, in many respects close to the German model (Dore 2000). To end this paragraph, at the start of the neoliberal era comparative welfare state research turned inwards, towards the North and the Far North, at a time when the outside world was going truly global. This conclusion requires a special digression – a Scandinavian paragraph, or parenthesis, or two (cf. Olofsson 1988).

Demography, size and scale: Scandinavia as a lost future?

Since Napoleonic times and the disappearance of the old Nordic monarchies, the four main Scandinavian countries have been extremely homogenous, with the partial exception of Finland, where a Swedish-speaking minority has been recognized since the Tzarist era up to and including by the present independent republic (Alapuro 1989). However, from this time until the early 1930s the Nordic countries were also emigration nations from which large

numbers of people moved in particular to North America. Since the Second World War two waves of migration have completely changed this pattern. During the first post-war decades labour migration meant that Denmark, Norway and Sweden became receivers while Finland continued to send people abroad in particular to Sweden (the free passport-less Nordic labour market). Labour migration from Southern Europe was encouraged during the boom of the following decade when the welfare state grew at a rapid pace, and, to some extent, citizenship (rights and obligations) along with it. The Mediterranean world became a major point of departure for the new residents of Scandinavia. From the 1970s onwards refugees, asylum seekers and family reunification migrants now also coming from further south and east became the main new settlers in Scandinavia, with Finland, though no longer a sender, a partial exception to this pattern of migration. This reflects a global move from South to North, a trend further strengthened during the 1990s by a great influx of people from war-torn former Yugoslavia, and later on from Iraq, Somalia and Afghanistan (Schierup, Hansen & Castles 2006).

Approaching the second decade of the new millennium, roughly one million foreign-born people in Sweden and half a million in Denmark and Norway respectively have contributed to a dramatically changing demography. These figures do not include the children of these migrants born and raised in Scandinavia (the second, even third, generation). Over the last decades, the societies of the Far North – with Finland, and Iceland, as exceptions – have been fundamentally transformed from ethnically homogenous to fairly heterogeneous communities. This has had an effect on the class structure – most of the newcomers initially formed part of the working classes – as well as on the welfare state, as strong attempts were made to culturally assimilate and socially include – “integrate” in the local parlance – peoples from afar into the Scandinavian nation(-state)s. The guest worker approach was early on abandoned – active labour market integration programs included language training and social citizenship studies – and gave way to various participatory political-institutional solutions including the right to vote in local elections after a few years of residence. Residency took precedence over citizenship in a universalist zeal to overcome the exclusion of the (Lacanian) “Other” (Althusser 1964/65; cf also Buck-Morss 2009 and Stephanson 2010). There was also a strong public concern about the fate of children of first generation immigrants and their opportunities for social mobility (higher education). Ambitious state-sponsored social inclusion programs - from pre-schools to service homes for elderly – were started in particular in the metropolitan areas (Scarpa & Salonen forthc; cf also Andersson 2006). Nevertheless, high expectations

have turned sour as the "failure of social integration policy" from the 1990s onwards – evinced by outsider status or social exclusion in particular in certain metropolitan suburbs (residential social segregation) – became a bone of contention between government and opposition (Goul Andersen 1999). In a globalized world these welfare states are facing a threat of de-globalization, or xenophobia that can be capitalized on in election times, rendering citizenship and welfare an ambiguous relationship. Perhaps it is in this context that the most recent elevation of the works of Elinor Ostrom should be understood. Imagined communities also matters in welfare state development: the question of scale makes this particularly acute in a Scandinavian setting where local governments responsible for welfare services – the municipalities and their counterparts at county level – were deliberately regarded as necessary and sufficient foundations for common efforts by citizens for citizens – and residents. Maybe this was naïve of the early movement-based welfare state strategists and social policy intellectuals, as the outcome of present trends tend to point towards commercialisation, de-regulation, "marketisation" and privatization, and not – public – decentralisation.

The Challenge of the River of Time

In addition, also a note on epochal changes in a different mindset: in recent decades the new global set-up and its cultural repercussions have entailed some changes that have also affected the geopolitical status of Scandinavia and its triumphant welfare state model. The earlier predominantly West-East global cleavage has been replaced by a North-South divide: the North has absorbed the old West and the rest is South, although the new East – East, South-East and in the most recent decade even South Asia (India) as well – have gradually come to challenge that axiological division (Therborn 2006). Moreover, in the Northern camp, on the fringes of the new-old world the Far North, now with Norway leading the way, has set itself apart as a partly different world of welfare states in "Social Europe" (Therborn 1996). Nevertheless, while employment regimes were scrutinized, upheld and admired before the neoliberal ascendancy, the social service or caring state received considerable attention as an object of privatization or outright sell-out of public assets with the advent of new times. With the new wave of globalization, the Scandinavian model has come under increasingly close international scrutiny at least since the 1990s and seems to have had to 'adapt' or adjust to the

new secular mode of global social organization (Clapton & Pontusson 1998; cf also Sunesson et al 1998). This is true, but – I would like to emphasize this – only to some extent.

Rather ironically, influential Social Democrats came to dance to the neoliberal tune in Scandinavia, too: re-commodification stressed at the expense of the former buzzword de-commodification (Hadjighasemi 2004). In the social policy debate of the 1980s and 1990s, many commentators and researchers began to argue that if the welfare system were to grow too large it risked perverting incentive structures in both working life and society in general. Welfare bred a dependant underclass, not a thriving citizenry with vibrant voluntary associations. Pundits and professors alike pointed to what they considered to be excessively generous sickness and unemployment benefits, and to the manifold opportunities for drawing disability pensions, and they claimed that this insatiable generosity resulted in various forms of over-utilization and over-insurance (Johnsson 2010; cf also Frykman et al 2009). Trade unions in particular had been far too successful in their defence of and advances for the commoners. Less was said about the advocates and lobbyists of agriculture, farming and farmers, the agro-political complex, as they belonged to EU officialdom. New Washington-modelled think tanks maintained that the assumption by the state of far-reaching responsibilities for the well-being of citizen leads to a moral weakening of various networks of civil society – families, neighbourhoods, entrepreneurs – and that persons receiving assistance were relieved of responsibility for their own actions. Human dignity had to be restored at the expense of egalitarian efforts. Moreover, others claimed that social policy, if anything, worsened the problems it sets out to solve. This critique is by no means new, of course; quite the contrary; the debate over the ‘spirit of welfare dependency’ was already raging at the dawn of social policy, both in Scandinavia and elsewhere but took a new “normative turn” in the Far North with the rise of the global neo-liberal agenda (Kildal & Kuhnle 2005). This reassessment of the role of the public welfare sector implied that the language of social reform had been fundamentally reversed.

The varieties of the third generation of welfare state studies

Since the early 1990s, the geography of comparative welfare state research has changed dramatically. Hence, globalization, and in particular global formal democratization if not global citizenship, has put its mark on social research in this field of inquiry (i.e. Haggard and

Kaufman 2008; cf also Ahmad et al 1991). Capitalism with a neoliberal face caught the imagination of the elite professions with the advent of the Reagan and Thatcher regimes, and as institutional public practice it was further advanced in particular in the third world, from the late 1970s on, most notably in East and South-East Asia (Woo 2007, Therborn & Khondker 2006). Later on, not only were the welfare systems of the former second world challenged by this ideological and social force. It should also be remembered that welfare states such as Finland and Sweden were on the brink of fiscal collapse in the early 1990s (cf Kangas & Palme 2005). This was the “Decennium Horribile” of the post-war advanced welfare state when also in Europe actually existing welfare systems in Europe as well were pruned and privatized (Schubert et al 2009, Gilbert 2002). Thus, at the end of the Cold War, the *sustainability* of the welfare state was an issue that attracted growing attention from social scientists as well as contemporary politicians and pundits whether on the left or right. While much of the discussion naturally took place in the West – in the US, federal welfare “as we know it”, was dissolved – it is also pertinent to recall the IMF’s and the World Bank’s structural adjustment programs in the third world and their intentional downsizing of the public sector, including education and health programs, not to mention infant social security schemes (Deacon et al 1997; cf also Haggard & Kaufmann 2008). The debate gained momentum with the collapse of the second world and the eastward enlargement of the European Union (Offe 2009). For instance, in neighbouring Latvia – previously one of the Baltic republics of the USSR – social administrators from Sweden were able to test a new, market friendly and slimmed-down contribution-defined pension system under the auspices of the World Bank before it was implemented back home.

Academic economists in particular, but also many political scientists and sociologists, held that the idea of the welfare state was too costly and inflexible when the global race to the bottom had began in earnest after the fall of the wall (Alber & Standing 2000). New “regime types” such as the insecurity and the poverty regime (re-)appeared and posed questions about the possibility of growth without welfare (cf. Breman 2007). Out of this conundrum came on the one hand the post-socialist welfare regime type closely resembling the Southern European model of the previous decade, on the one hand, and the concept of the developmental welfare state in East Asia with its new broad-based “productivist” social programs such as health and old age pension insurance, on the other (Kwon 2005; cf also Holliday 2000). Most of this “comparative turn” is captured by the social science research community included in Leibfried and Mau’s three volume edition *Welfare States: Construction, Deconstruction,*

Reconstruction (2008); a thorough summation of research industry that exploded after 1990, or the third generation of comparative welfare state research transcending the 64/22 nation-world of 1966 into almost half of the United Nations of 192 at the dawn of the third Millennium in which most of the above-mentioned social researchers appear.

Following the comparatively recent period of the politics of retrenchment and permanent austerity – deconstruction or the initial phase of the global neoliberal regime – the most recent discussions about the sustainability of the welfare state and the contemporary dilemmas facing various social actors on this arena is framed as “reconstruction” (in contrast to the initial construction). Controversy over indicators faded, as did the exclusive focus on de/re-commodifying regimes types and gave way to a multiplicity of analytical approaches to the necessity and possibility of a new welfare state different from the insecurity/poverty regime. Published as it was at a time when neoliberal assumptions were being overturned a new question emerged with the demise of Lehmann Brothers: if “how sustainable is the welfare state” was the question of Leibfried and Mau (p. *xiii*) we are now allowed to ask “is the new global political economy – the still rather loose and incomplete integration and reconfiguration of the first, second and third Worlds – sustainable without either some kind of “global welfare state” or institutionalised, even encompassing, national welfare state?” Moreover, are local reciprocal welfare systems possible in the modern world? Are charity and philanthropy realistic alternatives for citizens, denizens, migrants and paperless subjects around the globe? Or is there a way forward where these alternatives, perhaps at different levels following the Ostrom (1990) prescription alluded to at the start of this paper, can go together for a while? Thus, an era of embedded cooperation instead of, or as a substantial complement to competition; “social harmony” in present-day Chinese vocabulary?

These are some of the most pressing and relevant societal questions not least since the North American economic upheavals of 2007-8 have spread to most parts of the global economy, India being a partial exception (Financial Times 2010), but including the former second world’s more or less unrestricted markets and managed, or imitation, democracies (Furman 2008). The absence in the US of widespread health insurance coverage (daily sickness benefits as well as reimbursements for hospital treatment; not to speak of general child allowance), coupled with an unemployment system that has many loopholes, has definitely helped to deepen the crisis. Thus, the US social security system lacks many of the buffers that are needed to ward off a severe recession at the household and individual level. When people

lose their jobs and hence their ability to pay for daily consumption and mortgages, this has an immediate impact on the functioning of mass consumption and housing markets (Frank 2007). Most likely also on incarceration, political participation, social capital, and trust – “the Scandinavian puzzle” (cf Kumlien & Rothstein 2005). Outside the present centre of the world economy, only Western Europe and a few other advanced countries have developed more or less sufficient systems of social development and protection, although significant steps – beyond the US model – have been taken in such different countries and territories as Hong Kong, Singapore, South Korea and Taiwan (Hort & Kuhnle 2000). Some Latin American countries are other cases in point (Huber, Mutillo & Stephens 2008). South Africa is an example where segregated subjects have been emancipated into citizens by a Leninist-led national movement in power pursuing neoliberal welfare policies far from the early 20th century ambitions of the international working class movement.

India and Scandinavia during the new global era: towards insecurity/poverty regimes?

In the rhetoric of the present, India belongs to the giants of the future world together with the other BRIC/BASIC/BIC-countries (Brazil, India, and China but ex/including Russia and South Africa) – usually presented from a Western perspective. India will join China and Japan among the top five economies of the world.² Japan as part of the historical world of welfare is of course an altogether different case. The principal challenges facing the other are corruption, health, hunger, illiteracy, and mass unemployment. The BRIC/BASIC/BICs are on their way towards welfare including institutionalized social rights – and obligations – but much more needs to be done in most of these countries before a kind of bottom line has been drawn. Inequalities look almost insurmountable and the progress of citizenship and welfare slow. India has for a decade or so been part of this new wave of globalization; an equal no longer to the same extent underdeveloped as before and most often singled out as the world’s largest democracy. It has returned to the centre of attention after years in the shadow of the more

² Without any prior experience of the soil of India except armchair travelling – knowledge obtained from the world wide web, by reading books, serious journals and mainstream newspapers, looking at television programs, broadcast listening etc. – analytically it was a true challenge to try to establish links between this huge country/subcontinent and its public welfare ambitions, and similar attempts in the small 20th century states of the Far North. Thus, these jottings are in dire need of alteration or deterrence.

successful East and South-East Asian nations. It is still second to China, though the Indian economy is growing steadily in particular after the great turbulence of the autumn of 2008. Demographically the prospect of overtaking China is in sight, if some decades ahead. Politics, however, makes India different in time and space. It is not an “imitation democracy” where resistance to the reign of the free market forces has been obfuscated. Since independence, with the exception of a few years under martial law, the federal state of India has remained a vibrant democracy with an active citizenry including the voice and a vote, though at times on sale to a large degree by the long-neglected, predominantly rural poor. The sub-continental pattern of a variety of political forces has also made its imprint also on the structure of welfare (Nanavatty 1997; Chowdhry 1985; Djurfeldt & Lindberg 1979). In contrast to the emerging developmental welfare states in East and South-East Asia, it is not India’s soft national welfare systems that have come to the fore but rather the opposite: a thoroughgoing urban growth so far without much state public welfare organized from Delhi. The 2005 rural-employment guarantee and the Unorganized Sector Workers’ Social Security Legislation have not received high marks by outside observers and evaluators (Thakurta 2010). Instead, it is in some of the states – large as France or Germany – that the advance of welfare seems to be most visible. To my limited knowledge, it is at this regional level of government that citizenship and welfare has gone hand in hand. The state of Kerala has already been mentioned; West Bangali is another state I have come across in the literature. There, the labour movement has impacted, though only in the formal sector, and more so than the secular movement for national unity and development (the Gandhi-Nehru Congress). The enormous informal sector and the role of the rural social movements has to be further scrutinized in an attempt to give an account and an assessment of the scope of social influence that such “anti-epochal”, if not anti-systemic, movements have had during the present era (cf Breman 2007; Davis 2006). Is there a possibility for a new welfare take-off as the number of workers/voters grows by the day? Or will they be bought off by corrupt officeholders supported by magnates behind, or on, the (media) scene?

Scandinavia? The kind of social risk protection that Bismarck instituted at the dawn of the labour movement and which spread through Europe more than a century ago has proven rather robust despite constant warnings of excessive over-insurance and lack of efficiency and sustainability. With many people transformed from industrial wage-earners into urban borrowers more or less directly exposed to the highly volatile stock market, not only as future pensioners but also as tenant-owners, the need for adequate social protection and services has

become manifold. Popular support for such measures including its financing through rather heavy taxation has remained strong throughout the neoliberal era (Svallfors 2007). And following the sequential order of the five branches of social security – (1) occupational injury insurance; (2) old age pension; (3) sickness and maternity benefits; (4) unemployment insurances; and finally (5) a fairly loose set of family benefits including general child allowance – is still a basic part of the Nordic model, though in Sweden (1) and (3) has merged into a rather austere universal health insurance scheme, and a number of pro-active social policies have become part of the welfare state, in particular employment programs and, to some extent, public investment in (mass) education and research.

Thus, at least in North-Western Europe, the welfare state “survived” to allude to one of many recent books on this topic but did so transformed one way or the other (Eitheim & Kuhnle 2000). A blend of left- and right wing retrenchment measures has in most cases taken its toll throughout Europe though less so in Scandinavia and at the centre of continental Europe, where popular resistance has at times been outspokenly antagonistic to any insecurity/poverty regime. The Nordic model regained positive notoriety during the first decade of the new millennium (Kuhnle, Hatland & Hort 2003). As late as in December 2006, this welfare model had to be declared “dead” by a brazen, still up-beat London *Economist*. Nevertheless, the body is still moving – as a pain in the ass of Social Europe, at times even an embarrassment to its government officials to pursue within a self-complacent Union and at the IMF/World Bank head-quarters. Only three months earlier in general elections in Sweden, in order to replace Old Labour, it was deemed necessary for New Labour, the Moderate-conservatives and their partners in the right-centrist Election Alliance, to take on the shape and insignia of its predecessor, to become a proponent of welfare as we know it in Scandinavia. There, also the new social movements, for instance the Greens have become explicit though responsible supporters of an extension of a generous welfare state – a civilized version of workfare – while the great majority of the feminist movement following in the tracks of Alva Myrdal for a time was its most vocal defenders (Starck 1997).

Looking Ahead: Beyond the welfare state, or springtime for the labs?

Excavating the future implies being prepared for the unforeseen including interdependences and transgressions at a distance between these two worlds of (welfare) capitalism. With global

turmoil so close behind, it is perhaps too soon to proclaim the end of an era? Whatever the case, the welfare state as an actually existing state and as a research topic has definitely moved beyond its original borders and hinterlands. Nevertheless, it is pertinent to remember that this has not always seemed to be the case. The crisis of global neo-liberalism is of recent origin akin to the 'financial meltdown' of late 2008. In contrast, if at all remembered at the dawn of the second decade of the first century of the third millennium, the crisis of the welfare state dates back to the appearance of the first comparative study in this field of social research, Harold Wilensky's *The Welfare State and Equality* soon codified by the OECD (1981) embracing the (Japanese) 'Welfare Society'. In between, the welfare state became a bone of contention in national politics in the Western world as well as in the social sciences and history with the advent of the Reagan and Thatcher governments, soon to be accompanied by the collapse of second world socialism. Worldwide, ideas and practices that went against state interference and involvement in economy and society gained momentum at the expense of the early post-war consensus, or state interventionist approach. Outside the heartland of the welfare states, and partly also within this area, social planning was consigned to the graveyard. Instead, structural adjustment programs came into being whenever international organizations such as the IMF and the World Bank got the upper hand; the ILO, ISSA, UNDP, UNESCO et al were relegated to junior partners on global Wall Street. Welfare was created by individuals on the free market – not by citizens participating in fair elections – there was no such thing as society and aspiring social mass movements. Apart from social services in a broad sense, pension programs became the most obvious targets for the new (anti-) welfare reformers (Blackburn 2006; cf. also Lindh, Malmberg & Palme 2005).

This is a very different scenario from the one envisaged fifty years ago by Gunnar Myrdal. In the Enlightenment tradition he argued that after a first stage of piecemeal interventionist welfare new arenas of public policy and planning would signal the advance from politics to "culture" on a world scale. He imagined laboriously struggling progressive movements such as the ones he had witnessed and been involved in in his native laboratory, activating people to look after their own interests and formulating a set of policies designed to undo the structure of power while preserving the social welfare gains achieved in the initial stage. In the new welfare culture, development issues were to be settled by the peoples themselves, in their local communities and through bargaining between their organisations to promote the coming into being of a more cooperative national community, with greater identification, solidarity and participation on the part of the citizenry. His conclusions, rather idealistic as it

turned out, are nevertheless close to the ones suggested by Elinor Ostrom in 1990 based on comparative historical-institutional research, and honoured almost twenty years later in memory of Nobel at a time when a self-satisfactory Social Europe, and its Nordic model, had re-entered the global arena parallel to the emergence of new, so far more modest, welfare states had come to fruition where the developmental state first appeared. In the years to come, the amalgamation of these two types of states – developmental and welfare, and their respective types of citizenry – will most likely deserves a separate, transnational study. At the moment, however, the most promising approach in the social sciences to tackling the future of the welfare state seems to me be the one that looks at the quality of government through the lenses of corruption, bribes is the word used by Myrdal, a theme so far underestimated and largely ignored in the comparative welfare state literature. Several social researchers in the Far North and elsewhere have now begun to undertake this onerous task (Rothstein & Uslander 2005; Rothstein 2003). The laboratory is still with us, inscribed in a wider social fabric with its adjacent moral-spiritual topography, where India in all its contradictory appearances is taking important steps in the even more contradictory making of a singular modernity. Perhaps there is still a global demand for five labs in the Far North?

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