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Waves of welfare state modeling and theorizing: from Bismarck and Titmuss to Esping-Andersen and Lee Kwon Yew – Excavating the Future?

Some tentative remarks

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“Oh, East is East, and West is West, and never the twain shall meet.”
The Ballad, Kipling

“We believed in socialism, in fair shares for all. Later we learned that personal motivation and personal rewards were essential for a productive society. However, because people are unequal in their abilities, if performance and rewards are determined by the market place, there will be a few big winners, and a considerable number of losers. That would make for social tensions because a society’s sense for fairness is offended... /P.95/

Watching the ever-increasing costs of the welfare state in Britain and Sweden, we decided to avoid this debilitating system. We noted by the 1970s that when governments undertook primary responsibility for the basic duties of the head of a family; the drive in people weakened. Welfare undermined self-reliance. People did not have to work for their families’ well-being. The handout became a way of life. The downward spiral was relentless as motivation and productivity went down. People lost drive to achieve because they paid too much in taxes. They became dependent on the state for their basic needs.” /P. 104/

Lee Kwon Yew (2000): *From Third World to First: the Singapore Story 1965-2000*, pp. 95-104.

For many politicians and observers in the West, East Asia has provided a broad range of positive images of the state’s intervention in society. Neoliberals grew excited by popular welfare systems that cost little in expenditure and bureaucracy, Social-democrats thought they had found a model for social cohesion and equality. In fact the reality in East Asia is rather different from these stereotypes.

Goodman, White and Huck-ju Kwon (1998): *The East Asian Welfare Model – Welfare Orientalism and the state* p. 1

Introduction: models and theories

This paper is concerned with the development of welfare state modeling and theorizing from the emergence of the welfare state – with the set-up of social or worker’s insurance in Germany - to the current state of the art in comparative welfare state research at the beginning of the new Millennium, or the 21st Century. Experience of the West and Experiment of the East is, thus, an appropriate title to allude. In particular, this paper is concerned with the integration of East and Southeast Asia welfare models into welfare modeling and theorizing in general.

Welfare state theorizing is based on modeling, not exclusively, but to a large extent. However, there are two types of models within the international social welfare discourse. On the one hand, “heuristic” models or models based on “theorizing” or conceptualizing the historical experience, often in a unique context. The experience of the West in general is most often differentiated and separated into the experience and development in a particular nation-state. The first and famous example in this respect is the Bismarck model of social or worker’s insurance in Germany more than a hundred years ago, in the 1880s. The German model of social policy became a model for others to follow – policy diffusion or learning. Later on, it was Beveridge – and UK - that became the name of this game. Lately, also the Singapore of Lee Kwon Yew became a model, sometimes mixed with (post-)Pinochet Chili (V 199x). Furthermore, in this type of modeling, there is an emphasis on similarity.

On the other hand, in comparative welfare state research, which so far has been based on the experience of the West in the broader, cross-national, sense, welfare state theorizing is by and large also based on model-building. Here, the purpose is not primarily policy concern, but to make analytical distinctions between various types of social policies usually in more than one nation-state. Richard Titmuss various models of social policy are perhaps the most wellknown theoretical practice within this part of the social welfare discourse. From Titmuss to Esping-Andersen - and what has followed in the aftermath of the publication of *The Three Worlds of Welfare Capitalism* twelve years ago – models or regime-types have been developed to capture the essence of the welfare state and social policy. Such models are part of a typology of a more or less of weberian ideal-type character. Thus, in this type of modeling there is an emphasis on difference, difference between policies and between various nation-states.

Nevertheless, it is hard to separate these two types of modeling. In the intersection of these two types of modeling “things happen”, things become blurred. Comparative welfare state research, which is of much later date than heuristic model-building based on national experience, have come to influence policy diffusion or learning processes in particular after the break-up of the Soviet Empire and the Asian financial crisis of the late 1990s. Recently, not least international organizations such as the World Bank have been heavily involved in the policy diffusion process and they have tended to utilize comparative researchers in their endeavours.

To reach the point where “things happen”, I think it is important to keep the two types of modeling analytically separate for a while. By keeping them analytically separate, and take into account the actors involved in these kind of processes, it may be possible to “excavate the future” of welfare state modeling and theorizing. This seems to be a daunting task in an epoch characterized by “globalisation” with a tendency to prioritize uniformity at the expense of diversity.

From the start, I would like to re-emphasise what is stated at the first page: this paper is a work in progress, and the arguments are still under development and, thus, put forward in a rather zigzag or ad hoc manner. So far, the main ambition is to remind the reader of questions to be discussed during the days to come.

2. Phases in the development of heuristic social policy models

Long before the “comparative turn” – the turn to comparative research – models were developed in the first, heuristic sense. Heuristic models predates theoretical models based on comparative cross-national social research. From Bismarck to Beveridge national systems of social policy has been “theorized” by politicians and intellectuals – of a social scientist bend – into heuristic models. Power and authority in global society has had an impact on policy diffusion as well as on social theory across the globe. Or at least “in the West” as the history of the European East took a profoundly different turn with rise and fall of the Soviet parenthesis and its non-market, etatist welfarism (“those who do not work, should not eat”; §12 in Soviet social insurance law echoing the Communist Manifesto).

The social insurance schemes of Bismarck’s Germany – worker’s insurance - were the first model in this respect. The German *Verein für Sozialpolitik* made social science out of the Bismarckian experience. Karl Polanyi – later invoked for instance by Esping-Andersen - is another example of a theoritician who used the historical transformation of military Prussia into the market exconomy of industrial Germany as a springboard for his theses about the necessity of self-regulatory mechanisms – the embeddedness of markets – in the “Great Transformation”.

During the 20th century, warfare was pitched against welfare and the universal welfare system of Beveridgean UK became an alternative heuristic model. There is a link between model-building

and historical experience in the sense that the latter was based on national development: Germany, Britain, later Scandinavia and especially Sweden, and finally Japan became welfare models in this respect.

Thus, there is a sequence in the development of heuristic model-building: if Germany was first out, followed by Beveridgean UK at the time of World War II, during the golden age of welfare capitalism Scandinavia and Sweden became a model. So far, this was basically a European affair, although Rooseveltian New Deal during the 1930s aspired to become a model for others to follow. This is, for instance, evident in the terminological step taken during this period: from social insurance (Germany) to social security (US). But the American challenge to European supremacy in this field of social development never reached full victory (at least not before the 1990s).

Furthermore, already in the 1930s the Scandinavian countries came into focus as leaders in the development of social policy – together with Pacific New Zealand which became a kind of forerunner to developments at the heart of the British Empire. In Scandinavia of the 1930s, in particular Denmark and its social reforms aimed at workers and farmers was singled out as a model for others to follow, not least in Sweden.

From the late 1950s onwards Sweden – apart from becoming the Nordic champion already after World War II – and its modern women- and childfriendly welfare state “from the cradle to the grave” became a model for other, bigger European nation-states in particular. It inspired the Labour opposition (Crosland 1957) at a time when Harold MacMillan self-styled welfarism held a firm command over the British electorate. In the 1960s and 70s it was reform-minded politicians and intellectuals in France and (West) Germany that dared to let the Northern light shine: in particular Willy Brandt in the 1972 election proposed a new model for Germany based on his exile acquaintance with Scandinavia.

The golden age of welfare capitalism came to an end during the late 1970s, and the first signs of the crisis of the welfare state saw the light of day. Government overload, and excessive public spending all of a sudden reached the top of the political agenda. When the OECD (1981) as the first major international organization put the searchlight on the welfare state, modest Japan was put forward as a stark contrast to “eurosclerosis”: a welfare society instead of a welfare state.

Moreover, with the advent of Anglosaxon neo-liberalism the minimalist state was upheld as an ideal against the maximalist welfare state.

From Japan of the 1980s the step is short to the heuristic models of the early 1990s: the four small tigers of East Asia - Hong Kong, Korea, Singapore and Taiwan – prefigure the short spell of the “Asian values” and “Miracle economies” of Mohammed Mahatir and Lee Kwon Yew (apart from the latter’s Memoirs cited above, see for instance World Bank 1994). Thus, at least in terms of heuristic welfare models, there is a route from West to East, from Europe to Asia – an experiment of the East?

3. The first steps towards theoretical modeling: Beveridge and Social Administration

Before investigating the relationship between heuristic models, comparative research and theoretical modeling, let me propose that prior to the breakthrough of cross-national research theoretical modeling had already had its formative moment: the establishment of the Beveridge plan inspired the British social administration tradition to make a contribution which as an unintended effect had global repercussions.

As was the case in Germany at the time of the introduction of Bismarckian social insurance legislation with the rise of the Verein für Sozialpolitik, half a century later the set-up of the British welfare state inspired academic thought in particular within the fields of social administration and social policy. Out of the Beveridge plan and the hopes created by the Attlee Government came T H Marshall’s evolutionary scheme of citizen rights, Richard Titmuss’ various divisions and models of welfare and social policy, Asa Briggs definition of the welfare state – just to mention a few (cf. Olsson 1990). This has often been described as an insular tradition mainly preoccupied with the development of the British welfare state of the 1950s and 60s. Although this tradition seriously confronted big issues, it was marked by the optimism of the time and held that state power could bring about desired effects on the distribution of material resources without undermining the underlying stability of the socio-economic system. Since welfare issues were – and are – closely allied to policy, given the historical-institutional background it is no coincidence that there was a tendency to locate them within a rather matter-of-fact policy science than within a more traditional academic discipline. The nitty-gritty of everyday social administration has tended to dominate also academic concerns within this field.

The underdevelopment of sociology in the UK has been another factor emphasised by those who have written the intellectual history of academic social policy.

One of the most famous British theoreticians in this field, T H Marshall (1950), is a case in point. In his writings he linked the issues of welfare to those of citizenship. In his view, welfare rights are the third category of citizenship rights and obligations acquired by members of a modern society. First, there are civil rights, such as the freedom of association, organisation and expression, then there come political rights – such as the right to vote and seek political office – and finally there are social rights such as the right to economic welfare and social security. The definition of the welfare state by Asa Briggs cannot be fully understood without having this approach in mind. Although Marshall's linear model of the acquisition of rights has been criticised, his formulation of a series of rights have had normative power and provided a rallying call against welfare clientelism: welfare benefits should be awarded as a matter of legal entitlement on principles of universality and not on a discretionary basis.

To simplify more than possibly can be allowed, in the steps of Marshall followed the former's successor as Chair in Social Administration at the London School of Economics, Richard Titmuss, and his distinguished "divisions" and "models" of welfare. Although Titmuss predominantly was concerned with state welfare, not a bene social welfare, his early writings on the division of welfare highlight alternative paths to welfare provision (Titmuss 1958). For instance, another type of state channel is fiscal welfare, while the market may intervene through enterprise or occupational welfare in the terminology of Titmuss, and there may also be different forms of non-market private alternatives, within the family as well as philanthropy and charitable endeavours. At the latter point of provision, a later distinction is between for- and non-profit alternatives.

Titmuss' major surviving distinction was, however, between residual and institutional models of social policy. The first being one where the state seeks to limit its commitments to the deserving poor, while the second being universalistic along Marshallian lines with the state commitment encompass the entire population and closely following Brigg's three "directions":

"... a welfare state 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 in 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 relations to a certain agreed range of social services."

As an intermediary, Titmuss (1974) introduced the industrial achievement-performance or status model, in which welfare needs might be met on the basis of merit, work performance and productivity. This tentative modelling was soon further developed by several participants in the from the late 1970s vibrant international social policy research discourse. Methodologically consistent with the Weberian notion of ideal types, welfare models are stylizations or caricatures of approaches to welfare, providing one or several-sided templates against which actual welfare states can be compared and contrasted. They are not descriptions but abstractions, and they are not right or wrong but merely more or less useful for the purpose in hand. Various dimensions were, thus, listed to get a clue to the differences between these models. For instance, target group, rule pattern, benefit criteria, level of benefits, source of financing, degree of redistribution, degree of social control, status of receivers, social expenditure as a percentage of GDP and, finally, status of social policy in relation to the economy have been used as differentiating factors (cf. Kuhnle and Selle 1990).

As an excursus, in a recent study by a Norwegian scholar an ambitious attempt was made to mix the two Titmussian approaches through introducing the fiscal component of the "division of welfare" into Titmuss' three later "models of social policy" (Ervik 2000). Ervik is mainly concerned with comparing fiscal expenditure in eight advanced Western welfare states, and concludes that the levels of taxation, coupled to social transfers, are more important sources of redistribution than progressiveness of income tax (cf. also Giddens 2000:100). Out of his work on modelling, however, comes a fascinating but complex matrix or set of ideal-type models divided into a public social welfare and a fiscal welfare component enlightened by the ten above-mentioned dimensions (see table 1). The typology illustrates the crosscutting effect of the social division of welfare to be present in all the three models of welfare. Ervik modestly concludes, though, that this kind of typology "may be useful in classifying and comparing different welfare states, giving us some sense of their institutional variation and similarities" (2000:22), and is rather cautious in applying this matrix in his inquiries of pension and housing policy.

Moreover, there is a link between heuristic and theoretical model-building and in the intersection of politics and Theory “things happen. There is a “space” to take into account for further scrutiny. That space has during the last decades been transformed by the growth of comparative empirical research.

4. A brief history of comparative welfare state research

The Titmussian approach early on inspired research both of a comparative as well as a non-comparative character outside the British Isles, in the US and later in other parts of Europe. An early example of the latter type is Lebeaux and Wilensky’s study of US social welfare policy (1958). Regarding cross-national research, since the early 1970s, there seems to be two strands of research in this area, on the one hand the quantitative variable approach, and on the other hand the historical and qualitative case study approach. It is probably fair to argue, that the two major works of the first generation of comparative welfare state research were the ones done by Wilensky and Rimlinger.

Gaston Rimlinger pioneered the latter, historical approach in his *Welfare policy and industrialization in Europe, America and Russia* (1971). This book focused on the impact of industrial development on the replacement of poor laws by various social security systems. It has always been considered as a study of Western nations: “industrial societies” according to the preface by Reinhard Bendix, “modern society” is the first similar notion by the author of the book. In geopolitical terms, the emphasis is on Europe – Britain, France and Germany – while the US and Russia and Soviet Union form the two polar opposites. Actually, this is an early study focusing on alternative paths and differences between West and East (Russia), without saying so. Less remembered is probably a ten-country study by Kaim-Chaudle (1974), which is not historical but focused on actually existing social security programs and their designs. It is an exemplary study in its detailed knowledge of program characteristics. Again, among the ten countries six are European – Austria, Denmark, Germany, Ireland, the Netherlands and United Kingdom – while the other four all have at one point in time belonged to the British Empire (Australia, Canada, New Zealand and the US). An early example of a study on Asia conducted along these lines is Dixon and Kim’s *Social Welfare in Asia* (1985), which, however, did not hook up to the ongoing comparative current.

This combination of historical legacy and actual social programs as well as the sample size would be a major feature of the major European and other cross-national research projects of the 1980s. The European research projects from this time would, apart from a fairly solid anchoring in the dominant theoretical perspective, also brought in quantitative data, in particular the controversial social expenditure data (Flora 1986; Korpi 1980 & 1989). Already in the 1960s, the latter type of data was massaged by Cutright in his investigation of social expenditure developments in 66 countries (1965). But the “comparative turn” started with Harold Wilensky’s *The Welfare State and Equality* – a study that for long was the major reference-point in the second generation of comparative welfare state studies. Wilensky actually became a kind of strawman for those who came of age in the 1980s although he was later rescued by a Finnish researcher in this generation (Uusitalo 1985). This book from Berkeley, California, grew out of the American 60s with its reconsideration of the American Creed – the Great Society, the civil rights movements and the War on Poverty - and parachuted the notion of the welfare state as well as comparative studies in this field of social science research. Simultaneously, the spotlight was on the notion of equality, and together this new pair of concepts was a force to be reckoned with.

Although Wilensky speaks about post-industrial societies, to my mind, there is an obvious link between the works by Rimlinger and Wilensky, or to briefly quote Bendix preface to the former study:

“... the actual development of industrial societies lies somewhere between Tocqueville’s diagnosis and Marx’ prediction. Tocqueville had observed that the principle of equality has prodigious influence on the development of society ... To Marx, that equality appeared spurious, since it served to protect property and did nothing to alleviate poverty ... In practice, welfare policies go beyond Tocqueville’s diagnosis where the state provides benefits to all citizens as a matter of right. Moreover, they have helped to nullify Marx’s prediction so that today workers are criticized for their acceptance of the “system”.”

Wilensky’s 64-country study of the structural and ideological roots of public expenditure – to quote the subtitle of the book – was also based on social expenditure data, which he crossed with demographic data on the structure of the elderly in national populations. *The Welfare State and Equality* had global ambitions and divided its sample into four types of welfare states: liberal democratic (31 around the globe), totalitarian (8 East European), authoritarian oligarchic (17

around the globe), and authoritarian populist (8 around the globe if Cyprus is counted as European). However, the main part of Wilensky's book is devoted to a study of 22 advanced liberal democratic (19; apart from the usual ones among them also Iceland, Luxemburg and Israel) and totalitarian states (3; Czechoslovakia, GDR and USSR). In 1966, Japan was excluded from this smaller sample as it was only the 23rd richest country in the world (GDP/capita in US dollars). Thus, also poor and non-democratic countries were counted as welfare states if, apart from GDP-data, social security and military spending data were available.

Wilensky's work inspired and provoked a steady stream of new inquiries, mostly European in origin or with a heavy emphasis on Northwest European countries. Perhaps the two major examples are the works co-ordinated by Peter Flora and Walter Korpi respectively. Both tried in various ways to overcome the limitations of the social expenditure approach and enlarge the object of research. The main source of theoretical inspiration for the first was the Norwegian Stein Rokkan's historical-sociological scheme (cf Flora et al 1999), while Korpi was closer to the British tradition. Flora's 12-country study was limited to Northwestern Europe – the four Scandinavian countries (Vol I), Ireland, Italy, United Kingdom, West Germany (Vol II) and finally Austria, Belgium, the Netherlands and Switzerland (so far only in volume IV but to be included in volume III which, however, has not yet (will never?) materialised), while Korpi included another six – apart from Flora's twelve France (originally also part Flora's study), Australia, Canada, New Zealand, the US and, of particular importance in this respect, Japan - in an 18 OECD-countries study. Flora was exclusively European, Korpi "Western" in the traditional occidental sense. In the studies from the latter, Japan has most often been treated as an "outlayer" hard to fit into the major analytical framework of the project (cf. Esping-Andersen JESP 199x).

With the end of Southern European dictatorships – Greece, Portugal and Spain – and the enlargement of the European Union, and furthermore so with end of the cold war and the breakup of the Soviet Empire, new geographical areas have been brought into comparative welfare state research. First, Southern Europe thereby extending the sole focus on Italy to the above-mentioned neighbouring states which all became part of the European Union in the 1980s. Second, Central and Eastern Europe and the transformation of the Soviet-style welfare provision there has renewed the interest in the former totalitarian states. After Wilensky, the latter avenue was largely abandoned but the 1990s has seen a resurgence of such studies. A third area where there has been a renewed interest in the development of the welfare state in the 1990s is Latin

America (Huber 1996). At an earlier time Uruguay stood out as an example of this kind of state (although in Wilensky's work in 1966 among liberal democratic states both Jamaica and Trinidad-Tobago was ahead of the South American welfare state par excellence).

Fourth, in the 1990s, there is of course the widespread interest in the emergence of the welfare state in the miracle economies of East and Southeast Asia (Hort & Kuhnle 2000). A quarter of a century ago, only Burma, Japan, Malaysia and Taiwan from East and Southeast Asia were included in Wilensky's larger sample, and the first-mentioned nation-state was dropped from the regression analysis because of missing data (on persons 65+ in the population). Malaysia and Taiwan were by Wilensky both categorised as authoritarian oligarchic states, although only occasionally considered by the author. So was Burma. For instance, Burma and Taiwan were singled out as military high-spenders although he vaguely speculated about their future as welfare states (1975:82). Among these countries, the order of affluence, (or poverty), was the following: Malaysia (45), Taiwan (52), and finally Burma (63). Thus, most countries and territories that have appeared in the most recent wave of comparative welfare state studies on East and South East Asia were absent in the early phase of this kind of research.

But the inclusion of a few, rather disparate entities a generation or two ago, raise the question which countries to seek to include in a relevant sample of today. After Japan, it was the four little tigers – Hong Kong, Korea, Singapore and Taiwan - that in the early 1980s first appeared in comparative research of this type, or the type of study that Rimlinger represents. Obvious data problems as well as closed circles of power - access to relevant government documents and Ips - and often also language access, have limited the number of countries so far.

Apart from questions related to the unit of analysis and the choice of units of analysis, another lesson of the first and also second generation of comparative research is the necessity to construct a thorough basis for systematic comparison. It is an easily forgotten truism that comparative research data do not automatically come out of administrative statistics. Also when the case study methodology is applied, maybe it is a truism to stress that it is necessary to stick to parameters that will facilitate comparisons both in spatial terms and over time.

5. Phases in theoretical modelling - after the advent of comparative welfare state research

If Titmuss was the first, Esping-Andersen was the second. In between, there was nothing, or at least very little. Titmuss models arrived before the advent of comparative welfare state research, but has had a profound effect on this current. Although not particularly visible in the work of Wilensky, from the mid-1970s actual welfare states were sorted according to the three models of social policy proposed in the posthumously published work by Titmuss. This is evident from a textbook such as Mishra (197x, but see also original research by this author 1990) as well as in the above-mentioned work by Flora (1986) and Korpi (1979).

Out of one of the above-mentioned European cross-national welfare state research projects (cf. Korpi 1989) came the most quoted elaboration of Titmussian modelling: Gøsta Esping-Andersen's *The Three Worlds of Welfare Capitalism* (1990). Esping-Andersen's labelling is slightly more politicized than Titmuss, and instead of models he speaks of regimes. He distinguishes between the "liberal" welfare regimes, in which means-tested assistance and only modest universal welfare predominate; "conservative-corporatist" welfare states, in which the state further the preservation of class and status differentials achieved through employment and market participation; and lastly the "social-democratic" welfare state, in which the principles of universalism and "de-commodification" of social rights are strongly promoted.

Thus, having a relatively long pedigree, in the 1990s this approach received a considerable fillip with the publication of Esping-Andersen's work related to a sample of eighteen advanced nations including Japan. By and large it also divided the developed world roughly along geographical borders (Scandinavia, continental Europe and the Anglosaxon world). Nevertheless, and although explicitly tripolar in orientation, there has been a tendency at least in the popular reception of this modelling to return to the early dichotomy of residual versus institutional welfare state. This was of course strengthened during the course of the 1990s with the breakdown of the Soviet Empire. For instance, Europe was pitched against the US, the third way against a diffuse fourth, etc.

Almost immediately after the publication of the book by Esping-Andersen polemics flourished, and various alternatives were proposed by several scholars in the field and most often based on findings from empirical cross-national investigations. Either the old sample was reinterpreted adding a fourth model, or new entrants to the game provided an opportunity to propose a fourth

or even a fifth regime types (Castles & Mitchell 1991; Leibfried 1993). However, also other theoretical avenues spurred the interest in welfare state modelling and theorising. Apart from the powerful neo-liberal critic of all but a minimal welfare state, and polemics around the apparent retrenchment policies in the West during the 1980s and early 90s, another line of thought was provided by rather new or suddenly more powerful advocacy groups in this field. One example would be the “equal opportunity model” suggested by Quadagno in her study of race, gender and class – with a particular focus on the first concept - in the development of the (aborted) American welfare state (1994).

Most important, however, was the theoretical current underpinned by the feminist approach and explicitly focusing on the universal concept of gender, which inspired a number of studies that more or less tested the idea of three or more regime types. Basically, feminist research has tended to support the tripolar model (Lewis 199x). Throughout the 1990s, however, gender issues have continued to confront earlier lessons from comparative welfare state research (Sainsbury 1996; Sommestad 1998). This holds true at least for research in the West, but the question to be posed is perhaps how far this has reached beyond the geographical borders of the first and second generation of comparative welfare state research. Already at the end of the 1990s, it was probably fair to conclude that in addition to Titmuss three models, one or two more regime types have entered the current research agenda (cf. Korpi and Palme 1998). However, also the new ones are elaborations of the old trilogy. But these additional models differ depending on where the focus of empirical research is and on which part of the world the focus is.

Thus, one of the relevant questions to be asked is how far welfare state modelling and theorising is dependent upon the geographical enlargement of in-depth comparative studies, and another how dependent it is on inputs from other more general theoretical current in the broader field of the social sciences.

6. Bringing the East and Southeast Asian experience into welfare state modelling and theorising

With this heavily European and in particular British luggage to carry, it may finally be fruitful to bring East and Southeast Asia into Welfare State modelling and theorising. So far the focus will

be almost exclusively on modelling. With empirical focus on the four little tigers modelling was done by a few already in the early 1980s scholars (Chow, Midgley). But these attempts in the footsteps of Titmuss took a rather controversial turn with the proposal by Catherine Jones of the existence of a Confucian or “Oikonomic” welfare state (1990, 1993). In a similar vein as Wilensky had become a straw man for the European comparatists of the 1980s, Jones became a straw woman for many of those espousing comparative research on East and Southeast Asia along other theoretical avenues than the one proposed by the daughter of a Hong Kong gentlewoman. During the 1990s, her approach has been characterized as culturalistic and an expression of “orientalism”. In partial, this critic is more directed against political proponents of “Asian values” that employ a Confucian vocabulary to attain certain goals in particular regarding the size of the national welfare schemes (Goodman and White 1998; cf. also Said 1978).

In partial contrast, the notion of a “Japan-focused East Asian social welfare regime” was proposed based on empirical studies of the differences and similarities between Japan, Korea and Taiwan. The cultural elements were somewhat toned down, and the analytical framework was brought closer to the traditional geopolitical “western” approaches (Goodman and Peng 1996). Less “Japan-focused” is Gough (2000) who, after considerable theoretical elaboration, also employs the notion of an East Asian model in his study of Korea and four Southeast Asian countries: Malaysia, Thailand, the Philippines and Indonesia.

Since the advent of the 1997 Asian financial crisis, scholars from different social science disciplines have presented analyses and interpretations also of welfare policy responses by East and Southeast Asian countries. In focus has been an ambition to achieve a greater understanding of the relationships between economic development, ‘modernisation’, demographic change, and social policy responses in different cultural and political contexts. It is of particular interest to study in what way a sudden economic backlash – in a region which for ten to thirty years had experienced a rapid, ‘miracle’ economic growth – affected the politics of social protection and the ‘thinking’ on social policy and welfare issues. In particular the World Bank has been actively pursuing such an endeavour. What happened in terms of “thinking” in the World Bank between the Miracle report of 1993 – no social issues visible despite that the notion of public policy belonged to its subtitle - and the report of 1998 when one chapter was labelled “from economic crisis to social crisis”? Furthermore, also long-term major regional events may be taken into account in such an endeavour – such as the different wars and the way various territories were

integrated – as well as major internal developments in each case under review during this conference.

Of a different nature – but related to theorizing various models – is the issue of periodization. The financial crisis of 1997 points at the possibility of a crucial turning point in recent East and Southeast Asian history. Its implications for the development of the welfare state have already spurred a controversy. While some have pointed at the limited nature of social policy developments in this part of the world, and a continuation along these lines after 1997, others have emphasised the take-off period a decade or so before 1997, and underlined serious tendencies to build on and develop the foundation laid during the previous period. This could be described as a pessimist versus an optimistic stance partly reflecting the up-and-downs characteristic of Asian stock markets as well as of the present economic developments after an extremely strong period of growth ending in 1997.

7. To end

(To be added - There are many heuristic models from the 1880s to the 1990s, and most likely soon a new one will appear. In contrast, there are few theoretical models. Basically the same three or four – maybe five - models of social policy or regime types have been reinvented over time. Maybe we are still witnessing the transition from worker's to social insurance or social security in a "risk society" across the globe?