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Welfare Regimes in the Global South

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INGRID WEHR, BERNHARD LEUBOLT, WOLFRAM SCHAFFAR
Welfare Regimes in the Global South: A Short Introduction

Welfare states are usually celebrated as *the* crucial achievement of supposedly ‘Western’ modernity. However, a look at processes of state and nation-building in other regions of the world seriously challenges this Eurocentric vision of exclusivity (see for example Leibfried/Mau 2008: xxviii). Quite a considerable number of states in the global South, especially in parts of Asia and Latin America, developed *modern* welfare state policies and structures at the same time or even earlier than most of the European countries. In Latin America, Argentina, Brazil, Chile, Cuba and Uruguay initiated their first public welfare programmes in the early decades of the 20th century (Mesa-Lago 1978). In the context of the strategy of state-induced import substitution policies in the first half of the 20th century, welfare state policies were used to alleviate the tensions brought about by (dependent) capitalist development and the growing demands of democratic inclusion and participation. These countries, however, although heavily influenced by asymmetric relations with their European colonisers, did not copy European models or follow European trajectories. Nevertheless, the positive reference to the European Welfare states as representing a crucial political and social achievement has played a role in the political discourse of countries in the South, even at times when the neoliberal dismantling of the European welfare states was already under way. Thus, despite the neoliberal assault on social expenditures and the structure of welfare provisions (Deacon 2007) both in the Global North and South, the idea of using the state’s regulatory capacity for welfare provision remains a powerful and mobilising demand which has been advocated by different progressive social movements all over the world. Although in the context of the so-called Washington consensus, neoliberal structural reforms have been pushed by governments from the Global North and international institu-

tions, these pressures did not uniformly result in a dismantling of existing social policy programmes. As was the case with similar processes in Western Europe, attempts to reduce social expenditure or privatise existing public programmes met with the staunch resistance of civil society groups. Additionally, the globally popular conditional cash transfer programmes, originally meant as a kind of shock-absorber in the context of drastic reforms, effectively became incipient social security programmes based on means-tested or social rights approaches. Whether the post-Washington consensus will lead to a post-neoliberal era is still a very contested issue in scholarly debate. What has become clear within the context of the post-Millennium Development Goal debate, however, is the fact that social policies, welfare regime reforms and their impact on multiple, intersectional social inequalities will remain on the (global) political agenda for quite some time.

Due to the one-sided focus, until recently, on a handful of case studies within the global North (mainly Western European countries and a couple of former white settler colonies (the USA, Canada, New Zealand and Australia), developments in countries and regions of the global South were largely ignored by comparative welfare state research (see Wehr 2010: 88-89). Only in the last 10 years did 'peripheral' welfare states in Asia and Latin America and South Africa enter into the focus of the international research agenda (Gough/Wood 2004; Franzoni 2008; Haggard/Kaufmann 2008; Mesa-Lago 2008; Rudra 2008; Seekings 2008). Most of the efforts focused on 'pressing' welfare state and regime development within the global South into the categories and typologies of Esping Anderson, i.e. categories and typologies derived from a specific historical context quite different from that containing the challenges faced by most postcolonial states (for a criticism of those typologies see Wehr 2009, 2010).

Gradually, however, in an attempt to broaden the research agenda on welfare regime trajectories, contributions about and from the global South have been challenging the binary assumption of 'modern' Western welfare states residing in the Global North and 'traditional' welfare regimes in other parts of the world. Partially advanced by the findings of feminist research (Lewis 1992; Orloff 1996) which showed that even in supposedly 'advanced' welfare systems, benefits were not expanded simultaneously to all groups in the population but showed strong asymmetries according to gender/sex, race, ethnicity, or place of birth, recent research has made an

effort to take seriously historical trajectories of welfare regime development outside the traditional OECD world. 'Peripheral' welfare regimes are no longer classified as deficient, premodern varieties of the European norm, but rather as distinct *modern* models, whose origins and characteristics must be explained and criticised in terms of the respective historical and regional context and the specific challenges of (dependent) capitalist and democratic development.

Despite their differences, all articles in this volume share a perspective on welfare regimes which challenges underlying Eurocentric assumptions and shows a keen interest in deconstructing actors, power constellations and ideas which shape welfare trajectories in (post-)colonial settings. Seen from this approach, modern (peripheral) welfare states are not viewed as benevolent guarantors of certain social standards or as simple safeguards against the vicissitudes of life (unemployment, old age, accidents, disabilities, illnesses or parenthood), created to level income or other social inequalities. On the contrary, states use certain types of social policies in order to actively influence the social order and to reproduce or transform class and other social relations (Esping-Andersen 1990: 23). From this perspective, welfare states are powerful stratification and (re)distribution machines, exerting considerable influence on the social inequalities and commonly accepted rules of social justice. Social conflicts about the concrete limits and scope of social policies and interventions, thus, are not only related to questions of income and social security. What is at stake, then, is the definition of crucial inclusion and exclusion mechanisms (Kronauer 2002) and the participation opportunities and rights of individuals and particular social groups (rural workers or workers within the informal economy, women and ethnic groups), i.e. the right to participate in certain public goods like health and education). Access to social services and participation rights and opportunities always reflect existing political power constellations and asymmetries and cannot be isolated from the social struggles and social coalitions which brought them about. This can be clearly seen in the fact that social benefits were first of all extended to those social groups which were in a position to stabilise or destabilise existing production patterns or political authority structures, either due to their degree of organisation, their capacity to stir social unrest (for the term '*Konfliktfähigkeit*' see Schubert/Tetzlaff 1998: 28-29) or their strategic position within

the production process (on the authoritarian origins of welfare regimes see Mares/Carnes 2009: 96-101). Whether this originally very narrow circle of stakeholders could later be expanded, depended very much on the correlation of forces within society and the existing possibilities of coalition building (Rueschemeyer et al. 1992; Korpi/Palme 1998).

A look at the origins of the European varieties of welfare state regimes also shows that early institutional arrangements have long-term influences on the further development of welfare regimes, a fact which considerably impedes radical transformations. This surprising continuity of welfare state institutions may be partially explained by the social and political power of distributional coalitions with a keen interest in perpetuating the existing status quo (Pierson 2003; Haggard/Kaufmann 2008). Additionally, socialisation mechanisms contribute to the tenacity of welfare institutions, once these have been established. Recent results of comparative inequality and welfare regime research indicate that prevailing visions of welfare state orders and authority structures are not only transmitted and consolidated by direct interventions via social policies or the provision and distribution of private as well as public goods, but also by specific visions of social justice. According to these recent analyses, levels of income and perceptions of upward mobility (Benabou/Ok 2001) play only a secondary role. Path dependencies, though partially explaining the fact that welfare policies are 'slow-moving processes' (Pierson 2003), do not necessarily lead to frozen structures. The confluence of national and inter- or transnational factors might lead to punctuated equilibria or new critical junctures, challenging existing welfare regimes and policies.

In a nutshell, these brief considerations point to the fact that the concrete design of welfare state policies and structures always reflects political and social power relations and that these relations are embedded in formal as well as informal political institutions and state structures. In line with the power-centred approach advanced by Esping-Andersen (1990: 16-18) and in an explicit attempt to overcome the Eurocentrism of most welfare regime research, this special issue of the *Austrian Journal of Development Studies* concentrates on welfare regime trajectories in (post-)colonial societies. Special emphasis is given to the emerging 'semi-peripheries' (Worth/Moore 2009) in the 'Global South', whose rise is often connected to a possible rise of 'post-neoliberal' political alternatives.

Jeremy Seekings' article *Pathways to Redistribution: The Emerging Politics of Social Assistance across the Global 'South'* further elaborates on the discussion of political influences and their institutional legacy as regards welfare regimes in the 'Global South'. Seekings analyses the unprecedented rise of 'redistributive' welfare regimes in the global 'South', which are replacing previous models. This is in contrast to developments up to the end of the twentieth century, when the predominant welfare models were either 'workerist', based on social or private insurance linked to formal employment, or 'agrarian', with a 'safety-net' based in subsistence agriculture and the responsibilities of kin. According to Seekings, the development of 'peripheral' welfare regimes today is less class-driven, i.e. it is focused on citizens, rather than on workers or peasants. Seekings identifies processes of democratisation, especially increased political competition for votes of poor citizens, as crucial factors in the diverse pathways towards redistributive, pro-poor welfare regimes. He illustrates his arguments with three case studies (Brazil, Korea and India) of countries that have recently undergone considerable transformations and suggests that future research should concentrate less on the amount of aggregate social spending than on the question of on which social groups social assistance and social security funds are spent and on the political factors enabling welfare regime change.

Luciano Andrenacci's *From Developmentalism to Inclusionism: On the Transformation of Latin American Welfare Regimes in the early 21st Century* examines welfare regime trajectories and changes in Latin America at the beginning of the 21st century. Similar to Ehmke and Seekings, Andrenacci raises the question as to whether recent changes in welfare regime development can be interpreted as critical junctures, transforming existing patterns of inequality and poverty. After reviewing the classical literature on comparative welfare regime research and the possibility of transferring key concepts and assumptions to Latin American cases, Andrenacci identifies key elements of Latin American welfare regimes, regimes which are characterised by a problematic form of inclusion which finds its expression in a highly unequal access to central goods and services and thus a very asymmetrical distribution of citizenship and social rights in the region. Whether recent positive trends might actually lead to a transformation of Latin America's highly segmented and asymmetric welfare regimes is still an issue of debate, although the article ends on a slightly optimistic note.

The article *Farewell to diversity? New zones of health care service in China's Far West* by Sascha Klotzbücher, Peter Lässig, Qin Jiangmei, Rui Dongsheng and Susanne Weigelin-Schwiedrzik analyses Chinese health care policies and service provision to Kazak herders in Yinyuan County. Drawing on James Scott's concept of 'state enclosure' and a solid empirical basis of interviews conducted between 2005 and 2009 with herders, patients, and representatives of the health care system, the authors come to the conclusion that the Chinese health care system can be interpreted as a modern form of enclosure which enables the state to expand to remote areas. In an attempt to govern via health care policies, the welfare regimes become a 'distance-demolishing technology' which binds previously independent local groups to the state. The resulting governance structures in the health sector are not only more costly than local initiatives but also have harmful effects on these social groups as they are in opposition to the nomadic life-style of the Kazak herders. Additionally, due to its reliance on Han Chinese dominated concepts, the current health care system marginalises both local medical approaches and the Kazak employees.

Ellen Ehmke's contribution to this special edition focuses on *Ideas and Culture in the Indian Welfare Trajectory*. In contrast to the mainstream of comparative welfare regime research, which concentrates on regime types and institutional factors, Ehmke emphasizes the role of competing ideas in order to examine different welfare regime trajectories in the Global South. The author shows how, in the case of India, ideas of social transformation, strongly advocated by the independence movement, were gradually displaced by ideas of national unity. Within the larger political context of decolonisation and democratisation, preference was given to the stability of rule and national unity to the detriment of radical social transformation. Although neoliberal, growth-oriented development ideas have recently been replaced by ideas of 'inclusive growth', it is an open question whether the latest ideational shift constitutes a critical juncture which might actually bring about social reforms altering local power structures and the asymmetries characterising the Indian welfare system.

Even though the contributions build upon different theoretical backgrounds, they share the 'power-political approach', which views "institutions first and foremost as the political legacies of concrete historical struggles [...] [and] embrace a power-political view of institutions that emphasizes

their distributional effects” (Mahoney/Thelen 2010: 7). Empirically, they highlight a considerable expansion of redistributive policies in the emerging ‘semi-peripheries’ (Worth/Moore 2009) of the ‘Global South’, an expansion which seems to be both patronising (as especially shown by Klotzbücher et al.) and empowering hitherto excluded groups (especially shown by Seekings). How far these recent developments will contribute to the rise of new socio-economic paradigms (such as ‘post-neoliberalism’; cf. Brand/Sekler 2009) remains to be seen. However, these developments will continue to be shaped by the specific correlations of forces on politics.

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