Socioeconomic Change and Social Policy Development: Past and Present

Ayse Bugra

Professor of Political Economy at Atatürk Institute for Modern Turkish History and the co-founder of Social Policy Forum of Boğaziçi University in İstanbul

Draft paper prepared for the UNRISD Conference
New Directions in Social Policy: Alternatives from and for the Global South
7-8 April, 2014, Geneva, Switzerland

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UNRISD, Palais des Nations
1211 Geneva 10, Switzerland

Tel: +41 (0)22 9173020
Fax: +41 (0)22 9170650
info@unrisd.org
www.unrisd.org

This paper discusses the current trends in social policy in developing countries against a historical overview of public welfare provision in developed capitalist countries. This historical overview leads to certain observations which are of significance for the assessment of the choices made among alternative ways of defining policy objectives, strategies and instruments in the realm of social policy. On the basis of these observations, the paper approaches social policy development as an outcome of the emergence and the expansion of the market economy. It then shows that social policy intervention might be transformative in its impact on labour market relations, but it could also support and sustain market expansion. In a parallel vein, it is argued that systems of social protection might be shaped by the ideal of equal citizenship, but they might also be compatible with forms of inequality engendered by market processes or the character of social relations.

During the last few decades, in both developed and developing countries employment relations, family structures and gender roles have changed and these changes have been situated in an ideological context characterized by an intense questioning of the role government could and should play in the economy and society. In this environment marked by the dynamics of neoliberal globalization, the existing formal or informal models of welfare provision have come under pressure and countries with different socio-political structures which had evolved against different historical backgrounds have found themselves in a position to redefine the terms of social solidarity.

The second section of the paper discusses how this challenge has been addressed in developing countries and evaluates possible trajectories of social policy development in these countries with reference to their likely outcomes in relation to the following questions: Which principles will determine the forms of social integration? What will be the relative significance of the role played by market exchange, state redistribution and different forms of reciprocity relations in determining the coordinates of an individual’s position in society? Will social protection be based on labour market participation or on social rights defined beyond status at work? How and to what extent will the traditional gender roles be modified through the policy making processes? To what extent will the new directions in social policy contribute to de-commodification of labour and the advent of equal citizenship?

A historical overview of social policy in Europe

Public spending cuts and welfare state retrenchment associated with the dynamics of neoliberal globalisation often appear as dominant themes in the debates around the recent transformation of the systems of welfare provision throughout the world. However, the transformation in question has also involved the increasing significance of social policy intervention as an important dimension of state-society relations in developing countries.

The new interest in social policy in countries without mature welfare states has followed the insertion of these countries in the global market economy and, as such, it seems to be in conformity with the historical relationship with the dynamics of capitalist development and the emergence of public welfare provision. As Briggs (1961) observes, the problem of welfare emerges in very different ways in societies with and without market economies. In fact, already in the 16th century Europe, the commercialization of agriculture and the commodification of labour- or the emergence of what Marx calls "free labour"[1]- led to new forms of poverty which could no longer be managed and kept under control with traditional mechanisms of family support or religious charity. New mechanisms of social assistance in part financed and administered by secular authorities thus made their appearance in the context of the early European capitalism. The provision of assistance to the poor was introduced in several European cities and the Elizabethan poor laws were put in implementation in England (Geremek 1994; Fox-Piven and Cloward 1993). Social policy debate could be said to have originated in the same period. For example, *De Subventione Pauperum* (*On Assistance to the Poor*), a pamphlet on social assistance presented by the 16th century humanist Juan Luis Vives (1999) to the mayor of the city of Bruges, could be considered one of the earliest texts in social policy.

These historical developments suggest that social policy was born in the form of social assistance through the attempts to deal with the problem of poverty associated with early capitalist development. However, the path leading to the 20th century welfare state could be more easily situated within the 19th century market economy which Karl Polanyi (1944) described as an unusual phenomenon incompatible with human society. According to Polanyi, the exceptional character of the market economy has to do with its being led and dominated by market exchange. Although markets exist in all types of

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[1] Marx (1973: 507) uses the term "free labour" both in the sense of being "free from the old relations of clientship, bondage and servitude", and in the sense of being "free of all property" and entirely dependent on the sale of labour capacity as the only source of income.

societies in different historical periods, they only play an auxiliary role in economic life which is largely shaped by other principles of socioeconomic integration such as “reciprocity” and “redistribution”. Personal and informal relations of reciprocity or state redistributive processes control and regulate economic activity in conformity with social objectives. The 19th century market economy, where the principle of market exchange, with its exclusively economic character, came to dominate the processes production, distribution and consumption, presents a unique historical phenomenon where the economy is *disembedded* from society. The defining feature of the *disembeddedness* of the economy from society is the commodification of labour, land, and money. “None of (these elements of industry) is produced for sale”, writes Polanyi. “The commodity description of labour, land, and money is entirely fictitious. Nevertheless, it is with the help of this fiction that the actual markets for labour, land and money are organized.” (Polanyi 1944: 72).

After describing the devastating consequences of treating labour, land and money as commodities, Polanyi introduces the concept of “double movement” to explore the historical dynamics of the nineteenth century as consisting in the parallel attempts to eliminate the barriers to the functioning of the market economy and to resist, at the same time, its consequences for human beings and their social and natural environment.

Some of the social policy interventions in the 19th century England- the most typical market society of the era-, such as the New Poor Law of 1834 which abolished assistance to the poor outside the workhouse, were designed to support and sustain the commodification of labour by strengthening the link between work and economic subsistence. However, the enactment of factory laws and the expansion of philanthropic activity in the second half of the century were among the manifestations of the society’s reaction toward the devastating consequences of the market economy and the demands for the *re-embedding* of the economy in society.

The role of philanthropic activity in the trajectory of welfare state development is not unambiguous. In some ways, voluntary assistance sustained the marketization of life and livelihood by keeping under control the worst forms of indigence that emerged as a result of the commodification of labour. It could also be instrumental, however, in drawing public attention to those forms of poverty which were beyond the responsibility of the individual and thus calling for a reappraisal of the society’s values and institutions. Himmelfarb (1991), for example, underlines that an at least implicit demand for systemic reform was present in the activities of the late Victorian philanthropists. While this could be seen as a complement to other ideas which form the

background to the emergence of the 20th century welfare state, there was one fundamental difference between the moral universe of the philanthropist critique of the market economy and that of the welfare state. This difference had to do with attitudes toward equality. This is very clearly expressed in T. H. Marshall's seminal essay on "Citizenship and Social Class" where we find a discussion on the shift of emphasis from poverty to equality of citizenship status to be developed on the basis of civil, political and social rights.

Marshall writes that in the past public assistance to the poor was not necessarily rights based and private charity, which assumed the major part of the responsibility in dealing with the problem of indigence, often operated with the understanding that those who received help had no personal right to claim it: "(T)he benefits received by the unfortunate did not flow from the enrichment of a status of citizenship" (Marshall 1964: 95)

"Enrichment of the status of citizenship" is, for Marshall, necessarily a step toward equality of all those who are full members of a community with respect to the rights and duties they all have. Social class, on the other hand, is a "system of inequality". Hence, the inherent tension between citizenship and social class, which Marshall highlights to define the objective of social policy in terms of "class abatement" rather than as "merely an attempt to abate the obvious nuisance of destitution in the lowest ranks of society" (Marshall 1965: 106).

To what extent was the development post-Second World War welfare state in conformity with this expected shift of emphasis from poverty alleviation to equal citizenship? In the post war era, social assistance to the poor in fact became a marginal component of the expanding package of social benefits in developed countries. Nevertheless, the contribution of social policy to the ultimate objective of equal citizenship remained limited especially for three reasons. First, the policy focus remained on the objective of full employment and the systems of social protection were closely linked to labour market relations in such a way that social rights designated more the rights of workers than those of citizens.[2] Second, post-war welfare state was a "gendered institution" since the bearers of social rights did not only appear as workers but as male breadwinners of nuclear families based on the traditional gender division of labour. As the feminist critiques of the welfare state forcefully argued, women's citizenship remained contingent upon those of their husbands or fathers (Pateman 1986 and 2004; Orloff 1996). Third, the welfare state was not necessarily designed to

[2] On this see, in particular, Guy Standing (2007)

promote equality; in fact, as Esping-Andersen (1990) observed, it could well be seen as a system of stratification.

Esping-Andersen argued that the welfare states differed in their impact on labour markets and the family. Liberal welfare regimes could actually consolidate the commodity status of labour while conservative welfare regimes would draw on and serve to strengthen traditional family structures with male breadwinners and female care providers. Equal citizenship ideal as formulated by Marshall could only be seen as an objective and the potential outcome of social democrat regimes and the welfare state could play an economically and culturally transformative role only in certain societal contexts.

It should nevertheless be acknowledged that in the international system which emerged in the aftermath of the Second World War, welfare state policies played an important role in limiting the expansion of the market and the commodification of labour in developed capitalist countries. In other countries, too, markets were contained and controlled by mechanisms such as central planning or national developmentalist policies accompanied by different forms of reciprocity relations. Yet, in the post 1980 period, self-regulating market once again appeared as the centre piece of a globalized economy where the contemporary debates on social policy take place.

Today, with the expansion of the market economy and the economic and social changes that manifest themselves at a global level, all societies find themselves in a position to redesign the institutions of welfare provision. Certain economic and social transformations which mark the current international context are of particular significance for the attempts in this direction. The changes in the realm of employment, the globally observed trend toward the "precariatisation" of work (Standing 2011) in particular, have brought about probably the most important constraint in which social policy processes have to operate today. In developed countries, the increasing significance of part-time and temporary work and employment by subcontractors, franchisers or agencies constitute the key characteristics of a situation where the security of employment and income is undermined and it has become difficult for the existing social protection systems to operate in an effective fashion (ILO 2011). While similar dynamics of precariatisation of wage labour are also observed in developing countries, in these countries vulnerable employment- defined to cover self- employment and unpaid family labour- also continues to be important. Vulnerable employment is estimated to be close to 80 percent of total employment in some African and South Asian countries at the end of the 2000s. Even in more advanced countries such as Korea

and Mexico, it is 25 and 29 percent of total employment, respectively.[3] At the same time, de-ruralisation, which has gained impetus since the 1980s, has often been accompanied by the rise of urban informal employment.

What some writers have called "the gender revolution" constitutes another globally observed development which shapes the current environment of social policy (Goldin 2006; Esping-Andersen 2009). The rise in female education and employment has been accompanied by the transformation of family structures and fertility rates throughout the world. It is not possible to say that institutional response to this transformation have been sufficiently effective even in developed capitalist countries. It is clear, however, that the introduction of new institutions of social protection or the restructuring of the existing ones must necessarily proceed by taking into account the gender dimension of social problems in both developed and developing countries.

Social policy in developing countries

Institutional transformation in the realm of social policy is situated in the context of socio-political structures which had evolved against different historical backgrounds in developed and developing countries. A difference of particular significance is that in developing countries the problem of poverty as a social problem was, until recently, not addressed the way it had been addressed through the historical experience of capitalist development in Europe and formal social assistance measures introduced to deal with poverty were largely absent. Agricultural development programmes, investments in rural and urban infrastructure, public health and education policies played a certain role in poverty alleviation without targeting the individual in a social risk situation, but they could hardly be considered as substitutes for social policy. In developing countries where agricultural employment and labour market informality were important and the rule of law and democracy were not well entrenched features of the political regime, kinship ties, community support mechanisms and different forms of clientelism provided social protection to people in old age, ill health or poverty. Rather than the principle of redistribution, it was the principle of reciprocity, manifested in familialism and clientelism, which assured social integration.

Some of the late industrializing countries had introduced social insurance based social security systems in the post Second World War era. Nevertheless, these formal systems

[3] World Bank, World Development Indicators 2013:
http://data.worldbank.org/indicator/SL.EMP.VULN.ZS

covered only a limited portion of the population employed in the public sector or large private firms. Hence, what could be called a model of dual citizenship prevailed in an "eclectic" welfare regime with a corporatist system which co-existed with reciprocity relations including familialism and different forms of clientelism.[4] To a certain extent, the model exhibited the features of "South European welfare regimes", which nevertheless have followed a new trajectory within the European Union (Ferrera 1996; Gal 2010).

In the light of these differences in the institutional frame of welfare provision in developed and developing countries, writers such as G.Wood (2004) have argued that welfare regime typologies designed along the lines of Esping-Andersen's contribution would be hardly applicable to low income countries of the South even if it might be possible to use it in the context of the late industrializing countries of Latin Ameria or East Asia. However, one could interpret Esping Andersen's welfare triad including the state, the family and the labour market as an institutional model based on the role of the principles of redistribution, reciprocity and exchange as mechanisms of social integration, and suggest that the realm of reciprocity relations could be expanded beyond the family to include both clientelistic relations and the role of the voluntary sector. The problem would then become one of assessing the forms of articulation between state redistributive practices, labour market processes and different forms of reciprocity in shaping the character of economic and political relations.

In developing countries, the emerging institutional matrices of welfare provision are situated in the context of economic and social transformations which have taken place in a conjuncture where there have been attempts, carried out with varying degrees of success, to replace the authoritarian political regimes with democratic political systems. Social policy reform has to be conducted, therefore, within the constraints imposed by democratisation as well as by the requirements of fiscal sustainability as dictated by market competition. Electoral competition, along with the political pressure exercised on elected governments by organized civil society groups, means that the existing social protection systems have to be made compatible with political rights.

In this conjecture, the problem of social inclusion has become central to welfare regime change in developing countries. The institutional responses given to this problem can be explored by examining the developments in formal social security systems and in the realm of the hitherto missing social assistance component of social policy. The

[4] See Bugra (2007) and Bugra and Candas (2011) on the Turkish case.

developments in these two areas could give us an idea about the nature of the emerging paradigms of social policy in developing countries.

Could the social protection systems of a corporatist character be expanded to cover those people previously excluded from these formal systems? The example of East Asian countries, of Korea and Taiwan in particular, might provide a positive answer to this question (Peng and Wong 2008). In these countries the existing insurance based system was gradually expanded to cover an increasing portion of the workforce. Objectives of economic efficiency and growth continued to shape the logic of government intervention. However, these economic objectives were now integrated in a wider policy frame which did not only include the expanded sphere of pension and health benefits but also the introduction of child and elderly care which was previously relegated to the family. Socialization of care services constitutes an important incentive for female labour force participation and, as such, it is clearly a step beyond the male breadwinner model toward the transformation of the familialistic character of the old welfare regime.

Welfare regime change through the expansion of social insurance coverage has several advantages. It avoids the stigma and humiliation associated with means-tested social assistance. Gaining public approval is facilitated because contributory schemes eliminate concerns with “dependency”, which often emerge in the presence of cash transfers as a means of poverty alleviation especially where ethnic minorities or immigrant population are conspicuous among the beneficiaries. Nevertheless along with these advantages, there are also problems. Population aging is likely to decrease the share of active contributors in total population covered by the system in a way to create actuarial problems. Perhaps more significant are the questions pertaining to the compatibility of contributory schemes with flexible labour market arrangements and the rise of “a-typical employment”, which has now become quite typical with the trends toward precariatisation. Where employment security is undermined by these trends, work related social protection schemes might entail an important risk of social exclusion. During the three post-Second World War decades, the commitment of governments to full employment, security of employment and income, absence of high turnover and rapid skill erosion, and the presence of strong labour unions helped to sustain the feasibility of contributory schemes in developed capitalist countries and contributed to the credibility of the idea of industrial citizenship. In East Asian countries where the level of economic development is relatively high and the state capacity quite strong, regulation of employment relations and active labour market policies might help

to set up a proper institutional basis for the development of industrial citizenship. In low income countries where the state capacity is often weak, however, linking citizenship status to labour market participation could hardly present a solution to the problem of poverty and social exclusion.

In the contemporary institutional context of social policy change in developing countries, the expansion of the formal insurance based system is not the dominant model. A much more salient institutional trend involves the introduction of previously absent social assistance schemes to combat poverty. In fact, means-tested assistance currently constitutes a much larger percentage of public social expenditures in most Latin American, Asian and African countries than it does in developed countries with mature welfare states (ILO 2011: 74). Divers instruments of means-tested assistance, conditional cash transfers in particular, are also promoted by international organizations such as the World Bank.

In many countries, cash transfer schemes have indeed played an important role in eradicating the worst forms of poverty and they could be said to have the potential to transform the clientelistic relations between people and political authorities, and to reduce dependence on kinship or other informal ties for social risk protection. However, it is not yet clear whether these schemes would really have an economically and politically transformative impact or they would merely play a market sustaining role as a component of liberal residualism without much concern for the progress toward equal citizenship. The future course of institutional development in countries where cash transfers now constitute an important element in the realm of social policy would depend on a series of factors which could be discussed at two different levels.

The first level is the one where we find the society specific ways in which the programs are implemented. In their very enthusiastic evaluation of cash transfer programs in a large number of countries, the authors of *Just Give Money to the Poor* mention five principles which are important in determining how effectively cash transfers would be in contributing to poverty alleviation and economic development: "Cash transfers work when they are fair, assured, practical, large enough to affect household income, and popular" (Hanlon et al. 2010: 177).

The extent to which the implementation of cash transfer programs is guided by these principles would also influence the future course of institutional development. These programs can evolve and take the form of rights-based minimum income schemes if they manage to reduce the uncertainties that surround the lives of the poor and sustain the dynamics of marginalization; hence, the significance of the reliability and the

magnitude of transfers. Public approval of the expenditures on these programs and the confidence in the mechanisms of targeting the beneficiaries are important in constituting the basis of legitimacy necessary for an institutional development toward an inclusive welfare regime. For the present, there are doubts about the presence of these conditions even in the case of those Latin American countries such as Brazil and Mexico with the most developed cash transfer schemes (Lavinas 2013).

At a second level, one could raise another set of questions pertaining to the ways in which cash transfer programs are articulated with other components of social policy. In the presence of a system of social protection that provides health and old age benefits and services of social care, cash transfers could indeed make a contribution to the advent of a welfare regime informed by the principle of equal citizenship and effective in its impact on de-commodification of labour. Political commitment to the creation of decent work opportunities would be an integral component of this type of welfare regime change. There are, however, other possible scenarios which could emerge with different policy choices.

One scenario, which is in harmony with neoliberal sensibilities, would emerge in political environments where the concern with poverty alleviation co-exists with the determination to maintain fiscal discipline by reducing public social expenditures. In such contexts, micro-credit schemes, where social inclusion takes the form of integration in financial markets, and/or the expansion of the voluntary sector with the increasing importance of philanthropic initiatives in the strategies of poverty alleviation might accompany and even dominate means- tested public social transfers. The formal security system, where it exists, might be restructured by restricting benefits and coverage. The recent transformation of the Turkish welfare regime is to a large extent in conformity with this scenario. In Turkey, under the culturally conservative and economically liberal government that has been in power since 2002, the realm of social assistance has expanded but it has also been permeated by the logic of charity, and familialism and clientelism have survived by taking on new forms. At the same time, some of the changes made in the formal social security system have restricted benefits and coverage (Bugra forthcoming; Bugra and Candas 2011, Bugra 2013).

In another scenario, strategies of poverty alleviation would significantly rely on workfare and social transfers would be combined with work guarantees, as in the Indian National Rural Employment Guarantee Scheme. The Indian scheme might be a meaningful response to the challenge rural poverty in a low income country, but the implementation of such a policy as a model which combines employment creation and

social assistance on a national scale could be problematic. This eclectic mix of different policy objectives could neither enforce the commitment to full employment and employment security as a component of macroeconomic policy orientation nor foster the development of a rights-based minimum income scheme. It would rather result in the emergence of a category of marginal workers whose rights would be defined outside the normal procedures of labour market regulation. The government would either be creating a new category of informal labour or, by granting the beneficiaries of the program certain advantages beyond those of the informal sector employees at large, would be preparing the ground for the emergence of feelings of resentment and hostility against the program. Incorporating the right to work within the realm of social policy might have dubious economic and political implications which should not be overlooked in the attempts to reconcile social policy with economic development.

In Lieu of Conclusion

In “The welfare state in historical perspective”, Briggs (1961) defines the welfare state with reference to the effort to modify the impact of market forces in three directions- by guaranteeing individuals and families a minimum income irrespective of the market value of their work, by providing protection against social risks, and by ensuring that all citizens, without distinction of status or class, are offered the best standards available in relation to a certain agreed range of services. The arguments presented in this paper are situated in a particular understanding of the objectives, strategies and instruments of social policy which is in line with the effort described by Briggs. What is in question here is of course the direction of the social policy effort and not the expected policy outcome at any given moment. But, as I argued before, social policy institutions might be designed to yield entirely different outcomes than de-commodification of labour and the consolidation of citizenship rights. Approaches to social policy reflect different political choices and operate in different value universes.

Beyond these differences, however, the demands for the expansion of social rights in terms of benefits and coverage are often met with financial concerns especially in developing country contexts. There is a widely shared tendency to regard guaranteed minimum income schemes or universal access to health services, old age pensions and disability benefits as luxuries beyond the means of countries where the objective of economic development has to have priority over the expansion of social rights. In response to such arguments which insist on the scarcity of resources, one could draw

attention to the fact that in developing countries the share of public social expenditures in GDP is still much lower than the OECD average. There is, in other words, considerable room for increasing these expenditures relative to national incomes. Nevertheless, the question of financial constraints also brings to the fore the problems of the systems of taxation which call for serious reform initiatives in this area. In this regard, it could be argued that demands for the expansion of social security benefits in an inclusive manner have the potential to contribute to the consolidation of the ethical and political foundations on which the reform of the existing tax systems could be advocated and pursued.

Demands for more public social spending could also be supported with reference to the potential contribution of social policy to economic development. However, such an emphasis on the instrumental value of social policy should not be necessary; a well-functioning system of social protection is a valuable end in itself and does not need to be presented as a means to another end.

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