

Social Policy and the Crisis of Neo-Liberalism

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1 Introduction

In his “Concluding remarks” to an article on (unconditional) cash transfers as a form of social policy, Guy Standing (2007, p. 28) suggests, even before the current financial crisis:

Globally, social protection systems are in a mess. The family as an institution of social support is weakening; local communities are often unable to provide social and economic security because of the tendency for whole communities to be struck at the same time; the state has been cutting back on universalistic income support; social insurance is giving way to social assistance, with an array of poverty traps and unemployment traps; and enterprises of employment are cutting back on their social benefits and services, at least for their workers.

How are we to address this mess let alone anticipate how it will be messed up even more in light of the shock waves emanating out of the crisis of global finance? I am acutely conscious of the disproportion between my own limited knowledge and abilities and the diversity and complexity involved as far as comprehending the shifting incidence of social policy is concerned. Indeed, that should be the shifting and variegating incidences of social policies. As a result, the best I can offer is to review some of the most recent literature – although the crisis is too near for there to have been much of an academic response as yet in the field of social policy and outcomes – and to reflect on some of the bigger themes around the nature of the crisis and its implications. At the very least, I can provide some idea of the available literature although I hope to have done so in a way that reflects material developments in social policy itself (and not just debates around it). And, as will be apparent, not least from the extent of my quoting from the literature itself if not always favourably, there is a wealth of material that is valuable in depth and breadth and from which there are lessons to be learnt. This is not so much the problem as how to situate such contributions more generally in analytical, policy and strategic terms which is where I hope to have located this contribution.

In this light, I begin in Section 2 by discussing the nature of “neo-liberalism”, a concept that was already under critical scrutiny prior to what would appear to be its more recent crisis both in material terms and of legitimacy. An attempt is made to resolve the conundrums surrounding the notion of neo-liberalism by viewing it through three perspectives – its attachment to financialisation, its having gone through two phases, and its inconsistent, diverse and shifting amalgam of ideology, scholarship, policy and representation of reality. These perspectives are then, in Section 3, related to the shift between Washington and post Washington Consensus and the impact these have had in relationship to privatisation of public provision, as for pensions for example.

What we find, as uncovered in detail in Section 4, is that social policy has, indeed, been embedded in an analytical mess with two elements. On the one hand, in principle and in

piecemeal fashion in practice, social policy is attached to everything else since the problems to be addressed by social policy are deeply rooted in every aspect of economic and social life. On the other hand, it follows that social policy also lies somewhere between short-run ameliorative measures and an integral part of the process of development itself, however this might be understood and realised through other policies and change. Across the literature, we find two extremes. One, for example, associated with the World Bank, is much more wide-ranging than previously (and marginally less pro-market) in the scope of its analysis and the concerns attached to social policy but remains confined to some sort of household risk management of vulnerability within a broader framework of correcting market and institutional failings. At the other extreme, as with the approach most closely associated with UNRISD for example, social policy is seen as part and parcel of a process of developmental transformation.

In Section 5, the location of the debate on social policy between these two extremes is associated with a stunning, if not absolute, silence, in the literature of a concept that was previously heavily present in the pre-Washington Consensus period. This is the idea of social policy as being or becoming part of a welfare state. Some reasons are offered for why the welfare state should fall off the social policy agenda, although it has enjoyed a limited comeback in the form of the “developmental welfare state”. As discussed in Section 6, the idea of the welfare state has to some extent been squeezed off the agenda by the rise of the welfare regime approach to social policy. This is argued to be flawed for over-generalising across ideal types which are insufficiently sensitive both in method and empirically to the differences in context and content of different social policies within and between both countries and programmes.

Section 7 offers an alternative approach based on public sector systems of provision, pssops, in which it is argued that each social policy programme within each country needs to be examined on its own merits, taking account of the factors and specificities involved, including but not reducible to broader systemic influences, including the dynamics of change. In short, the Indian health system should be seen as distinctly Indian as well as distinctly health-related rather than reducible either to Indian social policy or health provision in general. Nor should particular social policies be uncomfortably fitted into a set of general principles (eg market and institutional imperfections, and/or predefined goals and ethos, and/or pre-defined processes) and/or ideal empirical types (eg welfare regimes). By way or in lieu of conclusion in Section 8, some reference is made to the complexity of the debate over (conditional) cash transfers that have emerged as part and parcel of the new social policy. It is suggested that the mixed results in debate and outcomes are inevitable given that social policy both reflects and combats underlying relations, processes, structures and agencies of economic, social and ideological reproduction. Equally certain is that this renders any gains that are made vulnerable to retrenchment, the more so they are contingent on the role of finance and the absence of popular support and participation.

2 Neo-Liberalism Is Dead – Long Live Neo-Liberalism?

Over the period of neo-liberalism, from the mid-1970s, there have been dramatic and uniquely extreme reversals in the evolving patterns of income distribution in the United States. Whilst, without wishing to finesse the figures, the average income of 90% of the population has stagnated, the share of income of the top 1% has increased from well below 10% to around double that. The proximate causes for this are well-known in

terms of the huge remuneration accruing to those occupying “management” functions, with the rewards from finance being particularly significant, as now widely popularly exposed in the wake of the financial crisis. Another particularly acute characteristic of the United States is the extent to which growing consumption, of necessity for those at lower levels of income, has been sustained by the speculative and mortgaged rewards that have derived from property ownership. With increasing expenditure on private health, education and consumption, this has also been associated with the growing US trade deficit and accumulation of dollar reserves across the world, with China’s new role especially prominent.

Crucially, whilst these developments may be at their most extreme in the United States, they also prevail elsewhere to a greater or lesser extent and in conjunction with many other economic and social processes that generate the complex causes and incidence of poverty and inequality. The impact of the crisis is liable to be severe, uneven and unpredictable, Naudé (2009) for an overview with reference to much of the recent (orthodox) literature. These developments, then, are clearly a source of growing inequality and poverty and, by that token, provide a rationale for remedial social policy. Yet, two of the most popular defining characteristics of neo-liberalism are its regressive impact on income distribution and its equally regressive antipathy to social policy in deference to individual and market responsibility. This raises the question of whether the current crisis places more progressive stances on inequality and social policy back on the agenda, not least as it has already offered a stunning and paradoxical episode in the evolution of neo-liberalism. For the ideology of free markets has given way to successful demands for extensive state intervention, even if especially to sustain the financial system that is on the verge of, or even beyond, collapse and is, in any case, prompting a major recession whose depth, breadth and duration remain uncertain. Does such overt renewal of state intervention signal the end of neo-liberalism or is it neo-liberalism reinventing itself in a new form?

Significantly, questions over the nature of neo-liberalism, even whether it is a legitimate category of analysis, had already been raised prior to the current crisis. As Castree (2006, p. 6) concludes, “I suspect ‘neoliberalism’ will remain a necessary illusion for those on the ... left: something we know does not exist as such, but the idea of whose existence allows our ‘local’ research finding to connect to a much bigger and apparently important conversation”. One major reason for the scepticism over neo-liberalism concerns its diversity and complexity across time, place and issue, with a corresponding lack of distinctiveness as far as the neo-liberal component is concerned in the local application – Bush is surely neo-liberal but he nationalises banks and insurance companies!¹ This problem has been explicitly addressed by Ferguson (2007) in the context of social policy, for he appropriately charts the extent to which the rationale for a Basic Income Grant (BIG) in South Africa has often been provided by progressives in deploying arguments that are borrowed from the neo-liberal portfolio. He reasonably asks, p. 83/4:

When activists, trade unionists, and others opt to seek concrete economic improvements for the poor by adapting to the reality of neoliberalism and speaking its language, are they simply falling into a trap by allowing issues of power and policy to be framed within a grotesque liberal vision of society that reduces all human activity to the pursuit of capital by (more and less impoverished) “entrepreneurs”? Or are they using the space that democratization has opened up to create new and potentially promising forms of political struggle - not acquiescing in an overarching (and anti-poor) neoliberal design for society, but rather taking up and creatively

redeploying neoliberal concepts and discursive moves in the service of a fundamentally different political end?

He concludes that, “We will also need a fresh analytic approach that is not trapped within the tired ‘neoliberalism versus welfare state’ frame that has until now obscured many of the key issues from view” (p. 84).

Nor is Ferguson alone in questioning the liberal use of neo-liberalism in addressing social policy. For Molyneux (2008, p. 775):

The term neoliberal is widely used as shorthand to describe the policy environment of the last three decades. Yet the experience of the Latin American region suggests that it is too broad a descriptor for what is in fact a sequenced, fragmented and politically indeterminate process.

Further, she continues:²

The evolution of social protection in the region ... [requires] a more grounded, historical approach to neoliberalism, and for some analytic refinement to capture the different “moments” in its policy evolution, its variant regional modalities, and its co-existence with earlier policies and institutional forms. It suggests that totalizing conceptions of neoliberalism as imposing an inexorable market logic with predetermined social and political outcomes fail to capture the variant modalities, adaptations and indeed resistance to the global diffusion of the structural reforms.

There are two separate issues involved here although they are closely related. One is whether neo-liberalism is too heterogeneous to allow let alone warrant an acceptable characterisation. No one can doubt the diversity to which it is attached and, yet, it also seems to capture the grander, possibly illusory, character of the past thirty years or more, not least by comparison with the putative Keynesian era that preceded it.³ Are we in danger of throwing out the neo-liberal baby (even as it has grown-up) with its mucky and murky bathwater? Second, though, is the strategic purchase to be made of neo-liberalism. Should it be contested as a descriptor of our reality or rejected, not least in the attempts to replace it with something else?

These conundrums can be addressed, even resolved, by appeal to three aspects of neo-liberalism that do render it a reality and one that must be strategically contested.⁴ First, and brought sharply into relief by the current crisis and the responses to it, neo-liberalism, and its counterpart in globalisation, are heavily underpinned by an extraordinary expansion and promotion of financial activity. This goes far beyond the proliferation of the financial markets themselves, and corresponding speculative activity, for it is the extension of those markets (not their inner parasitism in the form of derivatives, for example) to an ever-expanding range of activities associated with both economic and social reproduction that has marked the neo-liberal era. Such developments are well-captured by the notion of “financialisation”, signifying not only the greater weight of finance in economies but its greater scope of application, Fine (2007a). To put it pithily, the expansion of markets in general under neo-liberalism (as with all aspects of privatisation and commodification) has underpinned the expansion of finance in particular. Further, financialisation as the key distinguishing feature of the neo-liberal era is what justifies the term both in itself and in its effects by marking the contrast with, and even the reversal of, the previous Keynesian period. This is not simply

a matter of macroeconomic policy but the heavy subordination of economic and social policy more generally to the dictates of the promotion of markets in general and especially of finance.

Second, broadly, neo-liberalism has gone through two phases. The first is appropriately understood as the “shock” phase although of much wider, if less dramatic, applicability than to the transition economies of eastern Europe alone, although they are indicative.⁵ This is the classic phase of neo-liberalism in which the role of markets (for which read the interests of private capital) is pushed with limited regard to the consequences. It is aptly summed up in the phrase “Just do it”, and ranges over user charges through to privatisation. The second phase, dating from the early 1990s, has two aspects. On the one hand is the need to respond to the dysfunction and conflict that has resulted from the first phase. On the other hand, as most dramatically revealed by the current financial crisis, is the imperative of sustaining and not just ameliorating the process of financialisation. Symbolic of this is the level of state funding that is being made available to sustain the financial system in circumstances of extreme crisis when, in better times, such funding could not be made available for health, education and welfare. I can do no better to indicate both the scale and the priorities involved than by quoting Hall (2008, p. 6):

- the total value of the renationalisations of banks and insurance companies in the USA, UK and the rest of Europe is approximately equivalent to reversing about half of all the privatisations in the entire world over the last 30 years
- the USA renationalisation of the insurance company AIG is by itself equivalent to reversing all the privatisations that have taken place in the former communist states of central and eastern Europe since the collapse of communism.
- the UK government liability for the debts of Northern Rock alone is greater than the combined total value of all the private finance provided through PFI and PPP schemes in the UK and the rest of the EU over the last 17 years.

Another way of seeing the scale of the rescue is to note that the total cost of constructing sewers and water systems throughout the world's cities, to provide household connections for water and sewerage for over $\frac{3}{4}$ of the urban population in developing countries, would require only about €280billion – about 5% of the guarantees already given to the banks.

In short, we see that in the later, if now critical, phase of neo-liberalism, preserving finance takes absolute precedence over all other aspects of state economic intervention, including those associated with privatisation (out of which, of course, finance has, at least in the past, done extremely well).

Third, then, is to acknowledge that neo-liberalism needs to be disaggregated into separate components around scholarship, ideology, policy in practice and putative representation of reality. These are not necessarily consistent with one another, and do shift over time, place and topic. In general, there are tensions between the different components that remain unresolved. Broadly, though, in the context of development, the shift between the two phases of neo-liberalism can be identified with the shift between the Washington Consensus and the post Washington Consensus.⁶ For the latter, in particular, justifies piecemeal intervention to enhance the imperfect workings of

markets and institutions - although policies in practice might even be adjudged to have strengthened on those associated with the Washington Consensus, van Waeyenberge (2007). As will be seen, this has significant implications for the way in which social policy has been reconstructed, especially in the developing world.

3 From Washington to post Washington Consensus

This is most readily illustrated in case of privatisation. It is a moot point to what extent there is an overlap between privatisation and social policy. It is liable to be perceived to be more so, the closer we are to basic needs such as water and terms of provision in case of subsidy. As demonstrated at length in Bayliss and Fine (eds) (2007), the policy and rhetoric of the Washington Consensus were to privatise as much of the public services as possible with little or no attempt at scholarly justification, and equally limited attention to the realities underpinning provision with, for example, no survey of regulatory capacity of developing countries until 2004, Wallsten et al. (2004). At that point, in an apparently dramatic turnaround, the early 2000s witnessed a remarkable rethink on the part of the World Bank, its even confessing that it had been mistaken in being so ideologically committed to privatisation. This seemed to be inspired by the failure of privatisation to materialise in practice in some instances, the failure for it to generate the promised levels of private sector investment, and increasing problems with disputed and broken contracts. But, in practice, what the Bank proposed was less a rethink than a demand upon the state to use its own resources and capacities to facilitate further privatisation. As it were, the shock therapy had already accrued the easy and/or the profitable (or profitably made) privatisations, now something more was needed to sustain the process and, at the same time, the Bank began shifting infrastructural aid into its private sector branches in order to leverage the participation of the private sector in public sector provision. Further, there was even a pecking order of sectors, running from telecommunications through energy and transport to water and sewerage in terms of those sectors that were most likely to be able to garner private sector participation. Such initiatives to prioritise the role of the private sector despite the failure of privatisation to materialise or to deliver are particularly disturbing in Sub-Saharan Africa where 90% of delivery of such services will continue to depend upon the public sector even on best case scenario of private sector participation.

In the wake of the financial crisis, although it is currently too early to tell, the potential for private sector delivery (in partnership or not) of public sector services is liable to be severely restricted. Especially, but not exclusively across the developed world, finance for PPPs is simply drying up. And as Hall (2009, p. 6) reports:⁷

The IFC, the private sector financing arm of the World Bank, believes that the credit squeeze will make it even harder to finance PPPs. It estimates that \$110 billion worth of proposed PPPs may be delayed or cancelled, and that \$70 billion of existing PPPs are at risk because of increased costs of financing these projects for the private sector.

On the other hand, though, and potentially more positively, the failure of the financial sector, and the corresponding fear of recession, open up the possibility of a major renewal of public-sector led infrastructural investment.

The first phase of neo-liberalism, then, has privatised in various ways and sat back to wait upon the results to which its second phase can respond. This is reflected in public sector management by what has been termed the “evaluatory trap”, Olson et al (2001).⁸

For, when the promises of privatisation are not delivered, the reasons have to be found and corrected for by the actions of the state (or not). The costs involved can be considerable and will not have been factored into the original decision to privatise. Stuckler et al (2009), for example, find that the mass privatisation programmes in eastern Europe increased the short-term adult male mortality rate by a staggering 12.8%. Whilst, by contrast for example, the World Bank has offered a highly disputed study suggesting that privatisation has reduced infant mortality from water-borne diseases in Buenos Aires, Loftus and McDonald (2001), there must also be concerns over the otherwise unmeasured social and economic impact of privatisation across the developing world.

Significantly, the privatisation rethink of the World Bank had little or nothing to do with the shift to post Washington Consensus, at least as far as timing is concerned, as it came five or more years later – although adopting the market and institutional imperfections approach to privatisation that is characteristic of the new consensus. Privatizing pensions, on the other hand, had in the policy arena been even more laggard. As detailed by Orenstein (2005, p. 191-2):⁹

A turning point in the development of the transnational coalition for the new pension reform came in 1994 with the publication of *Averting the Old Age Crisis*, which brought the World Bank and its resources fully on board with the campaign for the new pension reforms ... Before its publication, the World Bank did not consistently advocate the new pension reforms and individual pension accounts in its pensions policy advice ... After 1994, no project documents by the World Bank are inconsistent with the new pension reforms, indicating that a policy shift took place ... This relies on:

1. A first pillar of state-provided, redistributive benefits, such as a minimum pension or a reduced social security system;
2. A second pillar of mandatory pension savings in privately managed individual accounts;
3. A third pillar of voluntary savings in funded individual or occupational pension plans.

By making advice more flexible than doctrinaire advocacy of the Chilean approach and allowing room for continuation of the state social security system, *Averting* made the global policy approach more appealing to a broader array of countries without giving up the key element of adding individual, privately-managed, funded accounts. Indeed, this flexibility set the stage for these reforms to be mixed with existing social security systems in many countries in Latin America and Central and Eastern Europe. *Averting* provided a single template for reform that was flexible enough to provide a basis for reform in the developing countries where the World Bank worked, as well as in the developed democracies, where many World Bank reformers played an important role in domestic pension reform processes as well.

As a result, “Between 1992 and 2004, the new pension reforms spread to 26 countries in addition to Chile”, p. 193, with a particular impact across eastern Europe and Latin America, p. 187. Irrespective, then, of the timing of shifts in policy, scholarship and rhetoric, what ties them together, without wishing to be reductionist, is the increasingly sophisticated approach to teasing out as much private sector financial participation as possible whilst managing contentious demands for state support for social reproduction.

Such developments lead Molyneux (2008) to identify a periodisation of neo-liberalism into three phases, the second of which, following the Washington Consensus, is

associated with the post Washington Consensus. This brings social poverty in general back onto the agenda, and poverty relief in particular, “neo-liberalism with a human face”, p. 780. And she also sees this as being superseded by a third phase of “reactive neo-liberalism”, specifically the “New Social Policy” in Latin America.¹⁰ I am not convinced that there is much of a distinction between her second and third phases other than the latter being more widely spread in piecemeal and fragmented fashion across a more or less indefinite range of activities and agents. Across both of her two later phases, that I would wrap up together, the issue is not simply the greater or lesser human face or reaction but the extent to which these are consistent with or facilitate continuing financialisation against the struggles and constraints of economic and social reproduction.

Indeed, the Washington Consensus had the broad perspective of construing and constructing society along the lines of market versus the state and reducing the latter to a residual in social policy and otherwise. Such virtual reductionism of both economy and society to correspondingly simple nostrums and policy perspectives, Carrier and Miller (eds) (1998), paved the way for the subsequent bringing back in of the multitude of elements that comprise the diverse and complex content of both economy and society and the relations between them.¹¹ Insofar as there is a second and third phase of neo-liberalism, it is primarily based upon the growing momentum, fragmentation, and incoherence of the process as opposed to any distinct demarcation between two such later phases.

4 Twixt Risk Management and Developmental Transformation

A sampling of the recent literature on social policy abundantly confirms this observation. What, for example, does social policy target? Even if restricted to social protection, it must include labour markets since the working poor are extensive across the developing world, Cook et al (2008). There is the particular danger of excluding those who are not in the formal sector and, as Mesa-Lago (2008, p. 85) puts it in the context of pension and healthcare coverage by social insurance in Latin America:

The idea that development will eventually expand the formal sector and thus extend coverage is contradicted by factual evidence in Latin America over the last 25 years. Social insurance, therefore, must adapt to the transformation of the labour market, expanding coverage to informal and rural workers and peasants, the poor and the elderly.

Thus, not only is the need for social protection permanent, rather than temporary, but it straddles those in and out of work and across the “churning” of work itself between formal and informal sectors.¹² Moreover, social policy is about efficiency as much as protection and, with the breakdown of the male-earner model and acknowledgement of the significance of migration, “public support for childcare and other policies to reconcile family and labor market work can promote employment and increase productivity”, Beneria (2008, p. 4).¹³

As is already apparent, then, the explosion of social policy across the second phase of neo-liberalism brings its attachment to each and every aspect of social development, neatly indicated in the title of de Haan’s (2008) book, Reclaiming Social Policy: Globalization, Social Exclusion and New Poverty Reduction Strategies, to which can be added equality, human rights, basic needs and much else besides. By the same token, there is an equally bewildering array of mechanisms and causes that are identified as

underpinning social policy. Thus, for Lai's (2008, p. 376) study of Macao, "the regulatory effect of social security policy, in particular, can be achieved in four distinctive ways: disciplinisation, legitimisation, reproduction and substitution". And for Mooij's (2007, pp. 332-4) study of food and education in India, there are a large number of factors involved:¹⁴

First is that social policies do not just address welfare issues or social development; they also play a role in the creation of regime legitimacy, the creation of regime legitimacy ... The more privileged and influential sections of the population do not depend on government schools for their children and are not affected by the public neglect of these state services. This class division does not lead only to an inability to mobilize sufficient resources, but also to *indifference, lack of accountability and corruption in implementation ... the judiciary steps in where the administration fails ... social policy processes in India are highly centralized ...* This centralization goes together with *high levels of involvement on the part of local politicians in policy implementation ...* Unlike some other developing countries, in India social policy-making – and *most* policy-making, for that matter – is not primarily a product of donor preferences and money. Yet *there are examples of international pressure or international discourses finding their way into Indian social policy-making.*

The last of these, the impact of globalisation on social policy,¹⁵ has already been highlighted in case of pension reform but it goes far beyond the role of international agencies themselves, not least with the privatisation of social policy and services and the creation of corresponding profitable opportunities for internationally organised big business.¹⁶

Significantly, Mooij identifies two "paradoxes" in the interaction between these various factors. The first is the double-speak promising much and delivering little, "It solves a problem that any democratic regime in a socially divided society faces: the necessity to attract votes from the poor majority without estranging itself from the middle and upper classes", p. 335. The second concerns the centralisation of policy but dependence upon local implementation. But these are less paradoxes than contradictions in every sense of the term and much more widely cast across a whole range of tensions. Criticism of neo-liberalism has allowed for "greater receptivity to voices that came from outside the mainstream — among them social scientists, NGOs and the UN community, along with heterodox and social economists", Molyneux (2008, p. 781). New languages and practices of social policy have engaged with democratisation, decentralisation, civil movements, empowerment and participation. Nonetheless, pp. 785-6:

The official policy discourses and forms of entitlement that are being created tend to place more emphasis on individual responsibility, while social security is defined in official statements as no longer residing solely with the state. It now involves, as noted, the co-management of risk—that is, the individual has to make responsible provision against risks (through education and employment), the family too must play its part (through better care), while the market (through private interests) and the community (through devolution 'co-responsibility' and the voluntary sector) are all involved in the de-linking of expectations of welfare from the state.

Yet, she concludes, p. 794:

Most agree that there has been a move away from relations previously characterized by authoritarianism, clientelism and paternalism, to ones based on more or less active citizens' involvement ... Others see a far less positive trend, evident in a thinning out of policy commitment, a decline in social rights, masked by the language of participation and social capital, in which development programmes embodying these principles serve more as a means of regulating the poor and mobilizing cheap or free labour than tackling poverty or securing development objectives.

Inevitably, the take adopted on the new social policy (or New Social Policy) will reflect different interpretations and goals of the same experiences and, equally, more or less selective appeal to different experiences.

In this light, it is hardly surprising that some approaches to social policy should push both its scope and its underpinnings to the limits. For Adésinà (2007), social policy needs to be located in the context of developing the economy, taking into account the goals of social cohesion and nation-building,¹⁷ to move from targeting to universality, to strengthen state capacity and leadership, and to forge broader links to gender issues (within labour markets and beyond). This volume aims at attaching social policy to “inclusive development” and is part of the UNRISD series,¹⁸ Social Policy in a Development Context which has been inspired by Thandike Mkandawire who concludes elsewhere, Mkandawire (2007, p. 25) that, emphasis added:¹⁹

After years of being viewed simply as a camouflage for special interests and thus inimical to fiscal responsibility, and after being reduced to the marginal role of safety nets, social policy is back on the development agenda. Much of the new emphasis on social policy is on the extremely important issues of redistribution and social protection. However, in the development context, one must add to these concerns the vital issue of production. This article has propounded several roles of social policy in underpinning the process of innovation in developing countries ... social policy can contribute to the social capability that underpins technological capacity and has a vital role in the process of catch-up. Social policy can be innovation-enhancing, through its effects on human capital and skill formation; through its capacity to alleviate risk and uncertainty by underpinning social pacts that are necessary for managing the contractual nature of labour markets; ... through its shaping the structure of demand via income distribution, inducing long-term perspectives in the financial sector; and through its contribution to political stability. These roles underscore the transformative role of social policy that is often overlooked or only implied in the analysis.

And the theme of linking social policy to transformation is also taken up by Sabates-Wheeler and Devereux (2007), but see also Aoo et al (2007) and Devereux and Sabates-Wheeler (2007b). The issue, though, is what transformation, by and for whom?

For, as Devereux and Sabates-Wheeler (2007a, p. 1) observe in an introduction to a special issue on debating social protection, “[it] appears to be equally amenable to appropriation by the ‘right’ (who are now inviting the poor to participate in economic growth opportunities with revitalising injections of targeted transfers) and the ‘left’ (who are hooking their ‘rights-based approaches’ onto the social protection bandwagon)”. This is the prism, together with the second phase of neo-liberalism, through which to review

the evolving contributions emanating from the World Bank. Moser (2008, p. 47), for example, complains:

The World Bank does not have a specifically defined social policy as such. Within the institution, three predominant social policy “domains” can be identified: social sectors, social protection, and social development. The fact that each has a distinct location within the organization has served to create artificial conceptual and operational barriers to a holistic social policy.

Of these domains, social development is seen as the least developed. Whilst her jointly edited volume showcases the role of “assets” as a means of pursuing social policy, her own take on its absence from the Bank might better be seen as being the social policy itself to which piecemeal and fragmented correctives are now being appended.²⁰ The review of Holzman et al (2009, p. 1) of World Bank policy over the course of the first decade or so of the new millennium reports that:

The first social funds were prepared in the late 1980s to help communities cope with short-term adverse impacts of structural reforms. These funds expanded rapidly to become a central part of the Bank’s poverty reduction efforts in low income countries.

Following on from the pensions and financial crises of the 1990s, ad hoc arrangements eventually gave way to a new framework integrating social protection and labour, “based on the conviction that risk and access to risk management instruments matter for development”. Their own figures, though, tell a different story. Over the eight years from 2000, total expenditure on “Social Protection and Labor Lending” amounted to a little less than a mere \$10 billion, pp. 6-9 for more details by different programmes and regions. However we measure poverty on a daily dollar count, this is in the region of a dollar per year for the world’s poor. Much more significant is the number of country Risk and Vulnerability Assessments, which total 127 over the period. At about \$10 million offered per country per assessment per year, the Bank might be thought to have purchased any corresponding influence over policy at an extremely low price.

Yet what marks the current stance of the World Bank on social policy are three fundamental characteristics. The first is its roots in the rhetoric, scholarship and policy perspectives of the Washington Consensus, with a corresponding lingering presumption of social protection as the response to random shocks that induce individual or household vulnerability that requires at most temporary relief in deference to market solutions. Second, though, is the flexibility and discretion that is exercised in departing from the Washington Consensus. As already indicated, more or less anything can be incorporated on a piecemeal but also, to some extent, umbrella basis. Consider, for example, Cunningham (2007) on social policy and minimum wages.²¹ It offers the following conclusion, remarkable overall in view of neo-liberal attachments to labour market flexibility, for not being entirely opposed to minimum wages. For, first, they are not a powerful tool to decrease poverty or inequality; second, they increase wages but decrease employment; third, low coverage can lead to major impact on labour market as a whole; fourth, they impact heavily on fiscal deficit both through state as employer and through linked levels of social expenditure; and, fifth, they do not necessarily benefit the poorest. Irrespective of the validity of these conclusions, striking is the measured policy perspectives that they solicit in terms of trade-offs. For, the report closes, p. 77:

Overall, the minimum wage is a social justice tool that is important in ... social policy portfolio, and it possesses characteristics that make it a desirable policy. The challenge is to set the minimum wage to maximize social justice objectives while minimizing the perverse effects of the minimum wage. Other social programs can offset the latter, thus improving the social outcomes of minimum wage policies.

As argued elsewhere, however, the impact of minimum wage legislation is less a calculus of costs and benefits than a focus for (labour) organisation and dynamic change, Fine (1998). This is precisely where the World Bank falls totally short on a more general scale despite the two other features of departing the Washington Consensus and incorporating more or less anything as social policy and in its interactions with more or less anything else. For, as a third aspect of the Bank's new social policy, it becomes developmental without any notion of development, able to include anything that is associated with development (good or bad, to be promoted or alleviated, and, inevitably, technicist for the purposes of economic and social engineering). In a sense, putting aside scope of what is included and the marginally more favourable stance towards the state as against the market, this marks a major continuity with the Washington Consensus, for each shares in common a method to get development without a specification of what it is! For the Washington Consensus, it is reliance upon market forces, whereas its successor depends upon correcting market and institutional imperfections as well as their accompaniments of poverty, bad governance, inequality, and so on to include anything else for legitimacy or discretion in policy.

This is brought out very clearly in the contributions of Holzman and Kozel (2007a and b) with social policy perceived as social risk management, SRM, without apparent regard, unless forced otherwise, to the endemic poverty attached to developing countries, hardly a risk to be managed. Poverty and social policy/protection cannot legitimately be treated as if attached to income alone and as if attached to "shocks" alone. As Guenther et al (2007, p. 17) reasonably put it in critique to which there is no satisfactory response, "In policy terms, SRM leads to interventions that focus on transitory income shocks rather than on structural determinants of poverty". Indeed, the presence of the analytical and policy tensions involved in all of this is confirmed by Ravallion's (2008) suggested response to the financial crisis in "Bailing out the World's Poorest". Is poverty short term or long term; do we target temporary or permanent measures? For, p. 21:

Even a highly successful effort to protect the living standards of the world's poorest from the global crisis will leave a reality in which poor people face multiple risks on a daily basis, well after the crisis. If the crisis does create the opportunity for building an effective safety net then it should become permanent, dealing simultaneously with crises and the more routine problems of transient poverty in normal years. It will be an integral part of the country's poverty-reduction strategy, recognizing that the impact of a shock is intimately connected to deeper problems of underdevelopment: credit and insurance market failures, underinvestment in local public goods, and weak institutions. The synergies between safety net interventions and longer-term poverty reduction can be reinforced by explicit de[s]ign [sic] features, such as incentives to encourage the children of poor families to stay in school or emphasis on building assets of value to poor communities.

So, everything is connected to everything else in both analytical and policy terms, and Ravallion can close:

There will no doubt be relatively low frequency events, such as the current global financial crisis, for which extra external aid will be needed, and certainly justified on moral grounds when it was the rich countries of the world that were largely responsible for the crisis. However, the domestic resources should be sufficient to cover a normal sequence of shocks as well as modest demand in normal years. The budgetary cost of such a permanent safety net need not be very high and it could well bring longer-term efficiency gains to the economy. The budgetary outlay could well be highly variable over time in risk-prone settings, entailing some fiscal stress.

But if developing countries can and should take responsibility for themselves except when subject to financial crises other than of their own making, how does this relate to a more systemic role not only in “promoting longer-term recovery” – the term deployed in Ravallion’s abstract for his working paper, and begging the question of recovery to what – but also in bringing about economic and social transformation?

5 From Welfare State ...

In this respect, there is a stunning silence across the World Bank literature, and much more besides. It is as if the welfare state does not and has never existed. And, of course, much the same is true of the absence of the (radical) political economy of welfare literature that approached the status of orthodoxy a generation or so ago, focusing on the design and function of welfare for advanced capitalism.²² These absences are hardly surprising for the Washington Consensus, not least with its neo-liberal and Americanised inspirations, but why should it be so for the post-Washington Consensus, not least with its rediscovery of its own version of Keynesianism, market imperfections, public and merit goods, and so on? By contrast, the modernisation aspirations of the pre-Washington Consensus were heavily influenced by the notion of emulating the welfare states of western Europe. As Ku and Finer (2007, p. 116) observe of East Asian welfarism in the 1960s and 1970s, but see below for later:

Modernization was proclaimed the only way forward for East Asia – and modernization meant westernization. Confucianism was deemed a barrier to progress. The East was instructed to take note and, on the face of things, seemed quick to do so ... Formal welfare-style institutions and the first ventures into welfare-related university studies were Western-inspired and Western-led, both in principle and mostly in practice.

This, possibly less than curious, absence within the current literature is in part explained by the extent to which the treatment of welfare by mainstream, market-imperfection, economists has eschewed systemic appeal to the welfare state and surreptitiously incorporated in its place models around individual (or household) risk management, insurance, safety nets, etc.²³ That such analytical frameworks should be imposed upon developing countries is to be expected. In addition, particularly in the context of development, under the Washington Consensus, the main focus for dissent around welfare placed emphasis on adjustment with a human face. It was complemented by opposition to the orthodoxy by appeal to the developmental state as alternative with East Asian NICs to the fore. Along with other issues, the developmental state paradigm, tended to overlook the role of welfare altogether, at least until recently. This was in part a wish to emphasise the role of industrial policy and, possibly, also a wish to overlook what was presumed to be a neglect of welfare and, therefore, a mark against the developmental claims of the developmental state.

The result has been an unfortunate stereotyping of the Asian welfare model through scholarly neglect and appeal to exceptionalism, Kasza (2006) for an outstanding critique. Ku and Finer (2007, p. 122) observe that study of east Asian welfare has remained neglected, but is currently addressed through three approaches: one is policy-oriented emphasising the role of the family, charity, authoritarianism and all implying the marginal role of the state in the actual provision of welfare; another is systemic, focusing on institutions and the priority given to education, occupation-based insurance schemes, and means-tested benefits; and the third seeks to fit East Asia into Esping-Andersen's typology of welfare regime types, and have perceived it as economic, productivist, developmentalist, Confucian, and even hybrid, see below on the tensions involved in applying this typology to developing countries and even more generally.

But all of this has begun to change over the last few years, and the breach between the developmental state and the welfare state has been closed if only marginally. And the idea of the developmental welfare state (DWS) has come to the fore. In case of East Asia, this is because the response to the financial crisis of 1997/98 induced both an unexpected expansion of social policy to provide safety nets and a closer study of previous levels of provision, their diversity across programmes and countries, and the reasons for these, see especially Kwon (ed) (2005) as part of the UNRISD social policy programme.²⁴ In case of Latin America, the passage towards a developmental welfare state is seen to have been interrupted by the period of the Washington Consensus, but to have been resumed (or not) with the latter's demise in light of some return of more progressive governments and the adoption of the new Latin American social policy.²⁵ The issue is whether this can depart from the second phase of neo-liberalism as I have described it earlier. For Riesco and Draibe (2007, p. ??), emphasis added:

The Neo-LADWS project seems rooted not only in the 20th century experience, from which it will probably draw inspiration, but over the inheritance of Neoliberalism in LA as well. The emerging paradigm implies a radical change of direction away from Washington Consensus kind of policies, and in fact, it is being conceived over the criticism of that model. Nevertheless, the new project seems to inherit quite a lot from the Neoliberal period as well.

More generally, as already observed, there has been extensive attention to the emergence of a new social policy across Latin America from which I would emphasise the considerable diversity across countries and programmes.

6 To Welfare Regimes?

Nonetheless, the role of the developmental (welfare) state as an approach to analysis and policy remains limited. Much more influential in the study of welfare in developed and developing countries by non-economists has been Esping-Andersen's notion of welfare regimes, with a number of ideal types posited along the lines of correspondence to those associated with Scandinavia (social democratic), Germany (authoritarian) and the US (liberal). As I have observed elsewhere, in rejecting the welfare regime approach, Fine (2007b):²⁶

So dominant has this approach been that it has inevitably been extended from a few developed countries to the world as a whole, including East Asia and developing countries. Equally inevitably, such extrapolation of

ideal types has floundered as case studies fit more or less uncomfortably within the hypothetical scheme of three welfare regimes whether across or within countries across different programmes of welfare provision.

In other words, the welfare regime approach is insufficiently sensitive to differences between countries, and unduly neglects how those differences affect outcomes differentially across the different components that make up social policy.

Nor is it simply a matter of fixing the approach with an expanding range of ideal types. There are just too many considerations to be incorporated, and these cannot be reduced to a list (even if itself expanded) from the incidence of power and resources (the original hypothesis underpinning welfare regimes) to familial dependence, democracy, governance, and so on. The most general way of doing this, formally through statistical factor analysis, is striking. For Franzoni (2008), welfare regimes are constructed around the notions of commodification, decommodification and defamilialization. These are operationalised as follows: “To measure commodification, 11 indicators that address the degree to which domestic labor markets absorb, provide salaried jobs, and remunerate the labor force were used”, p. 77; “To measure decommodification, nine indicators related to coverage and expenditures, whether public or private, were reviewed”, p. 79; and “To measure defamilialization, eight indicators were considered: extended and compound families (inverse correlation), economically active women in reproductive years (direct correlation), nuclear families with spouses with unpaid work (inverse correlation), and domestic servants (direct correlation)”, p. 79.

That is a total of 28 variables to be taken into account in characterising welfare regimes and, no doubt, others could be added. Equally, for Lee and Ku (2007, p. 197):²⁷

A set of 15 indicators is developed for the factor and cluster analysis of 20 countries, based on data from the 1980s and 1990s. The results indicate the existence of a new group, consisting of Taiwan, Province of China and South Korea, which is distinct from Esping-Andersen's three regimes - unlike Japan, which remains a composite of various regime types. Regime characteristics peculiar to the cases of Taiwan, Province of China and South Korea include: low/medium social security expenditure, high social investment, more extensive gender discrimination in salary, medium/high welfare stratification, a high non-coverage rate for pensions, high individual welfare loading, and high family welfare responsibility. When compared with Esping-Andersen's three regimes, the East Asian developmental regime shows similarity with his conservative model, in respect of welfare stratification, while the non-coverage of welfare entitlements is similar to his liberal model. There is virtually no evidence of any similarity between the developmental welfare regime and Esping-Andersen's social democratic regime type.

In short, even granting its dubious applicability to western Europe, in considering social policy in a developing context, it might have been better if the welfare regime approach had never arisen!

For it is the method that is inappropriate irrespective of the content with which it is imbued. Social policy is made to fit within pre-ordained models or ideal-types rather than the contextual specificity of policy and provision governing how these are addressed. This is not to be atheoretical and purely empirical in teasing out how multitudes of factors interact with one another and are endowed with a particular content and

meaning. For, inevitably, whether implicitly or explicitly, some view will be taken on the nature of (capitalistic) social and economic reproduction in general and its particular structure and dynamic where policy is itself being made (at global, national and lower levels). As is already apparent, the welfare regime approach begins to unfold as soon as it is focused upon particular countries and/or programmes or policies, with much of the analysis pitched at an intermediate level as if, for example, all social policy could be reduced to dealing in income support as a homogeneous use of resources in response to underlying disposition of political power, organisation and ethos. But there is no reason why these should, even if taken as determinants, lead to the same nature of outcome across education, health and housing, for example.

7 The PSSOP Approach

The issue, then, is how to deal with the specificity of particular elements of social policy, in terms of their diversity of causes, content and consequences, without losing grip of the bigger picture. Currently, as seen, there have been a number of solutions on offer, such as appeal to (modified or hybrid) welfare regimes, transformative social policy or the developmental welfare state. My own approach has been to posit the notion of public sector systems of provision, pssop. Specificity is incorporated by understanding each element of social policy and social provision as attached to an integral and distinctive system – the health system, the education system, and so on. Each pssop itself should be addressed by reference to the structures, agencies, processes, power and conflicts that are exercised in material provision itself, taking full account of the whole chain of activity bringing together production, distribution (and access) and use, and the conditions under which these occur.

Thus, the pssop approach has the advantage of potentially incorporating each and every relevant element in the process of provision, investigating how they interact with one another, as well as situating them in relation to more general systemic functioning. This allows for an appropriate mix of the general and the specific and, policy-wise and strategically, signals where provision is obstructed, why and how it might be remedied. This is in contrast to unduly focused approaches, those that emphasise mode of finance alone for example, unduly universal approaches such as those that appeal to market and/or institutional imperfections or welfare regimes, and those that fail to recognise that water provision is very different from housing provision in and of itself as well as in different contexts.

I first applied the pssop approach, if not explicitly in terminology,²⁸ in MERG (1993), as part of a policy programme for the economic and social infrastructure for post-apartheid South Africa covering, in particular, health, schooling, housing and electrification. As universally recognised, there can be little doubt about the contextual specificity, and deep-rooted, nature of the inherited provision in South Africa, with numbers of elements in common across the separate sectors in light of the particular form taken by racism. Nonetheless, it was and remains crucial to acknowledge the inherited differences in existing manner, levels and incidence of provision as well as the sectorally-specific challenges involved within the wider context of the continuing dynamic (and transformation) of the South African economy and society more generally, Fine (2007).

The pssop approach has also been addressed in later studies, Fine (2002) in general and Bayliss and Fine (eds) (2007) for electricity and water. I am not concerned here to develop the pssop approach more fully as such for, in part, as already argued, it is

essential to see it as an approach that needs to be contextually driven rather than as a source of the ideal types or universal theory that characterises and even mars so much of the current literature. Indeed, the purpose is rather, first and foremost, to persuade of the need for something akin to the pssop approach irrespective of the method and theory with which it is deployed which will, no doubt, continue to be controversial, alongside the nature, depth and breadth of economic and social transformation essential for any significant change in provision to be secure. In other words, there is something different about water and housing, just as there is something different about South Africa and India. Further, though, this does allow for the results of existing studies to be incorporated into the pssop approach to the extent that they do identify, however partially, the factors involved in provision.

In addition, as highlighted in earlier accounts of the approach, not only is each pssop uniquely and integrally organised in provision, by country and sector, each will also be attached to its own meaning and significance for those engaged with (or excluded by) it. For example, whether a programme is seen as household risk management against vulnerability or collective provision towards developmental goals is both cause and consequence of material provision itself and, equally, subject to debate (or not insofar as different approaches exist in parallel with one another according to context). As argued previously, the cultural (in the widest sense) system attached to each pssop is also integral with material provision and is generated along and around that provision itself. Without going into details, the culture and meaning of social policy, thereby, becomes subject to what I have termed the 8Cs - Constructed, Contextual, Chaotic, Construed, Contradictory, Contested, Collective, and Closed.²⁹

What is involved can in part be illustrated by reference to a number of tensions in the purported rationale underpinning social policy. At one extreme for example is the idea of provision as serving the consumer (as individual or household), most notable in a language of customers and clients (with support to risk management and vulnerability) and to which the antithesis is the idea of collective provision, welfare state, basic human rights and needs, etc. As argued in Fine (2005b), welfare provision perceived as consumption tends to disintegrate as soon as provision is traced back to its origins in production and distribution, and as soon as inequalities and inequities in provision are highlighted since these reveal differences in, and conflicts of, interest that are not captured by the universal notion of consumer (that is all of us without differentiation by class, gender, race or whatever). By the same token, possibly motivated strategically to gain wider support, the push for social policy to be universal provision, as opposed to selective or conditional, is inevitably revealed as differentiating between “consumers” by favouring, at least in principle, those for whom there would otherwise not be provision although, in practice, it may be the better off who disproportionately benefit. These considerations reinforce the imperative of addressing social policy through reference to specific programmes and the cultures to which they are attached.

8 Cash Transfers by Way of Conclusion

I am acutely conscious of the apparent inability of the pssop approach to address what has recently been one of the most prominent issues for social policy and development, the role of cash transfers, CTs, since this involves payment of income support, with or without its being conditional, CCT, as opposed to the direct supply of public services.³⁰ Observe, first of all, however, that one major aspect of the appeal of CTs is the endemic and chronic nature of deprivation, especially with respect to material and direct provision

of public services whose absence is intended to be compensated for by provision of cash and, hence, presumably, direct purchase of livelihood necessities. This point can be brought out in a rather different way in terms of the complex incidence of both minimum wage legislation and social expenditure, as highlighted in the study of Waltman and Marsh (2007). For they find that where social expenditure is extensive and progressive (as in Scandinavia), minimum wage policy (a sort of conditional legislation for minimum income) is not found to be necessary. By contrast, “minimum wage states tend to be relatively stingy in spending public money on social welfare”, p. 170. But amongst the states with minimum wages, social expenditure tends to be higher for those with higher minimum wages. Thus, “the same political groups who press for increased public social expenditures press also for higher minimum wages. If so, the coalitions tend then to succeed or fail in both endeavors”, p. 171.

Whilst I hesitate to accept these generalisations, especially if extrapolating to developing countries (and without regard to structure and composition of (un)employment, migration, and so on), what is striking is the extent to which income support (albeit minimum wages) both serves as a substitute for social provision and as a basis for campaigning for its extension. In this respect, like all social policy, outcomes necessarily both reflect and contest entrenched structures, processes, powers and agencies. At a specific level, let alone more generally, the idea that there will be universal solutions on how to balance (or more exactly transform and promote, respectively) one against the other borders on the ridiculous in both analytical and strategic terms.³¹ Consider, for example, the case against CCTs offered by Freeland (2007) as “Superfluous, Pernicious, Atrocious and Abominable”, p. 75. Drawing upon Samson (2006) and a South African case study, he finds conditioning transfers on meeting criteria of children’s health and education falters on lack of facilities to deliver and/or access these, and weak capacity to deliver conditioned transfers, so, “it is typically the poorest and most vulnerable who will find it most costly to comply with any conditionalities, and are therefore the most likely to be deprived of benefits if they fail to do so”, p. 77, but see below for an apparently successful programme.

Do such problems render unconditional transfers more palatable as would be argued by proponents of a Basic Income Grant, BIG, a proposal that has been particularly prominent in, but not confined to, South Africa? Again, I would hesitate before giving an unconditional answer as there are a whole series of issues concerning administration (and corruption) of delivery, use of the income transferred, potential sidelining of direct social provision, and consolidation as opposed to transformation of existing social relations (around what works under what conditions for example).³² Significantly, the latest issue of Basic Income Studies is dedicated to the question, “Should Feminists Endorse Basic Income?”, and offers powerful arguments on either side especially in relation to the alleviation as opposed to the consolidation of gender inequality.³³

Over the last two years, I have found myself returning again and again to the following quotation from Sir Josiah Stamp, a member of the Board of the Bank of England, and reputedly the second richest man in the UK in the 1930s:³⁴

Banking was conceived in iniquity and was born in sin. The bankers own the earth. Take it away from them, but leave them the power to create money, and with the flick of the pen they will create enough deposits to buy it back again. However, take it away from them, and all the great fortunes like mine will disappear and they ought to disappear, for this would be a happier and better world to live in. But, if you wish to remain the slaves of

bankers and pay the cost of your own slavery, let them continue to create money.

Elsewhere, I have observed the affinity between this remarkable confession and insight and dependency theory, only with the banking world placed, by way of analogy, in the core against the rest of us in the periphery, and the power of the flick of the pen in creating money serving as the mechanism for surplus transfer, Fine (2008a). Though powerful imagery may be conjured up, it is insufficiently filled out in terms of other agencies, processes, structures and mechanisms. But it does advise us of the vulnerability of progressive policy to the flick of the pen, the banker's or otherwise, against which safeguards need to be put in place but which provide no guarantees.

Thus, Moore's (2009) study of a Nicaraguan CTT programme, attached to child education and health, is deemed to have been a considerable success other than in not being continued, having been dropped primarily on her own account for lack of understanding and misrepresentation of its achievements upon transfer of responsibility from one ministry to another. She closes with the observation that, "Although RPS [Red De Protección Social] had a disappointing conclusion, all is not lost". For, "in its own uniquely complex environment [we] can remind policymakers to be aware of the balance they must keep in performing well for international stakeholders while securing domestic acceptance of their own programmes", p. 36. But what of the flick of the pen, the transfer from one ministry to another, the shifting interests of external agencies and so on? Such programmes require secure provision of the goods and services that they are deemed to fund for the individual or household, whether in spending the transfers or as a precondition for their allocation.³⁵ Surely these, and their relative insulation from the flick of the pen through active participation and public provision, as pssops, should be our starting point.³⁶ As Katz (2004, p. 763) puts it in critical response to the Sachs Report, "Primary health care is, of course, one of the public services required to provide the conditions for good population health". Yet, "We have 100 years of solid public health experience demonstrating that access to decent food, clean water, adequate sanitation, and shelter are the major determinants of health", p. 756. And much the same, if also different by context and meaning, could be said of education, nutrition, housing ...

Footnotes

¹ And see Daguerre (2008) on Bush's social policy. She observes that, "moderate Democrats such as senators Joe Lieberman, Barack Obama and Hillary Clinton endorsed on a number of occasions the 'family values' agenda promoted by Republicans, in particular in relation to the fight against teenage pregnancy and the promotion of responsible fatherhood", p. 375. And she anticipates in closing, pp. 375-6:

Should the Democrats return to the White House, they would not radically reverse the pro-marriage and family values agenda ... Conditional social assistance is now at the core of the residual US welfare state, with a renewed emphasis on the need to change the behaviour of the poor as opposed to the structural factors behind social deprivation and unemployment.

In this light, who are the neo-liberals and what are they?

² See also p. 794:

The adequacy of the generic and totalizing descriptor "neoliberalism" when grappling with this diversity of political forms and social relations, is at least

questionable when the differences between “thick” and “thin” forms of liberalism, and alternatives to neoliberalism, are perhaps the more critical issues needing analytic attention.

³ As neatly put by Schmidt and Hersh (2006, p. 70), in citing Gindin (2002, p. 6), “according to the new neo-liberal discourse, “What were until recently measures of capitalism’s achievements were redefined as responsible for the end of the golden age and as unaffordable barriers to capital accumulation”.

⁴ See Fine (2008a and b and 2009b) on the issues that follow.

⁵ See Lendvai (2008) for the complex and diverse “quantum leap” into western europeanisation of eastern Europe’s social policy, with omission of the Keynesian welfarist stage, without which – as especially for developing countries – it is more a case of privatising what is not already there.

⁶ And the shift to Third Wayism which seeks, in many respects, to push the agenda of privatising social policy further than purer forms of neo-liberalism that recognise a sharper distinction between market and (authoritarian) state responsibilities, see Lund (2008). For New Labour and New Zealand’s social policy, see Lunt (2008); and Mendes (2008) for the paradoxes of Howard’s social policy neo-liberalism in Australia.

⁷ See IFC Infrastructure Crisis Facility Fact Sheet, 2008, [http://www.ifc.org/ifcext/about.nsf/AttachmentsByTitle/IssueBrief_ICF/\\$FILE/IssueBrief_ICF.pdf](http://www.ifc.org/ifcext/about.nsf/AttachmentsByTitle/IssueBrief_ICF/$FILE/IssueBrief_ICF.pdf)

⁸ As Farah and Rizvi (2007, p. 339) put it in the context of schooling in Pakistan, “Partnerships are often temporary and established for the purpose of a transition to privatization”. In contrast, they close with the advice that, “Above all, the financing and quality assurance of basic education, particularly in a poor country, should be the responsibility of the state”, p. 352.

⁹ Note the Chilean model, inspired by Chicago interventions, maximises the extent of reliance upon individual private funding of pensions, with at most a safety net for non-participants. Note also that, “*Averting* was the result of a research project initiated by World Bank Chief Economist Larry Summers in the early 1990s”. See also Orenstein (2008).

¹⁰ Across Latin America, Barrientos et al (2008, p. 767) pinpoint this as follows:

Three important themes emerge from these cases: (i) the focus on poverty reduction since the 1990s and the emphasis on transfer programmes as the main instrument for addressing poverty; (ii) the focus on households and families as the target unit of social policy; and (iii) the emergence of social guarantees and rights driving the evolution of social policy.

¹¹ Here there is a striking, and far from accidental, parallel with the broader bringing back in of the “social” by recent developments in “economics imperialism”, Fine and Milonakis (2009).

¹² See Lund (2008) for the complexity of the issues involved in providing social protection for those in work.

¹³ Dannreuther and Gideon (2008, p. 847) observe for Chilean health reform, “how, historically, social policy in Latin America has been highly gendered, drawing on assumptions of male breadwinners and female dependents”.

¹⁴ For these and other reasons, it is unfortunate that the introduction to the special issue to which Mooij contributes should suggest, “Taken together, all five articles reveal the large room there is for the involvement of the market and the state to generate synergy for social policy intervention”, Pellissery (2007, p. 322). On the contrary, the articles at least implicitly demonstrate that this is not the way to go about addressing the issues involved.

¹⁵ See especially Deacon (2007) for example.

¹⁶ See “The New Gold Rush: The New Multinationals and the Commodification of Public Sector Work”, Work, Organisation, Labour & Globalisation, vol 2, no 2, 2009, <http://www.analyticapublications.co.uk/> See also Forrest (2008) on the globalisation of housing finance whose chickens have come home to roost not unlike a SARS epidemic!

¹⁷ See Béland and Lecours (2008) for the relationship between nationalism and social policy, drawing upon case studies for Canada, the UK and Belgium. Social policy is found to be used for forging, mobilising and competing over national solidarities and identities, ranging far beyond pursuit of economic self-interest to incorporate notions of fairness, rights and mutual

responsibility, with corresponding impact on policy processes and outcomes, with no fixed relation to promotion or erosion of welfare provision at either national or lower levels.

¹⁸ See Mkandawire (ed) (2005), Kwon (ed) (2005), Mackintosh and Koivusalo (eds) (2005), Cornia (ed) (2006), Razavi and Hassim (eds) (2006), Moghadam and Karshenas (eds) (2006), Riesco and Draibe (eds) (2007), Adésinà (ed) (2007), Bangura (ed) (2008), Prasad (ed) (2008), and Hujo and McClanahan (eds) (2009). I have not been able to consult all of these.

¹⁹ Note, though, that inclusive neo-liberalism is one of its possible varieties, Mahon (2008) following Craig and Porter (2005).

²⁰ It is interesting to speculate whether the idea of asset-based livelihoods may have drawn some inspiration from Bush's "ownership society", with at least some sensitivity of the offence this might cause for those otherwise in abject poverty, see Béland (2007).

²¹ The study is primarily concerned with Latin America.

²² Note that Ravallion's (2008) own contribution only references at most a few pieces from outside the immediate orbit of the World Bank, an endemic feature of its research as commented upon by the Deaton Report (2006) on which see Bayliss et al (eds) (2009) for a critical appreciation.

²³ See Kay (2008) for public policy as economism through reference to market failure, externalities, lack of competition, public goods, information failures, immobility and time lags, and incomplete markets. AND government failure. On the other hand, Taylor-Gooby (2008, p. 863) observes of risk:

An important response, particularly prominent in the UK and especially in social policy-making, has been New Public Management, associated with an individual rational actor paradigm. Sociological approaches to risk have contributed a number of critiques of this development, however these critiques have failed to gain much purchase on policy-making. One reason is the extent to which approaches which rest on an individual rational actor paradigm are entrenched within the institutional framework of policy-making.

²⁴ For some developments around welfare in east and south Asia, see Choi (2008), Kwon (2003, and 2005a and b) and Kwon and Chen (2008), Kitthananan (2008) and the special issue in Social Policy and Administration, vol 41, no 4, 2007. The rapidly evolving and complex situation around social policy in China renders most contributions out of date before they are in print! See Fine (2007b) for a short discussion but also Lin and Kangas (2006) and Li et al (2008).

²⁵ For Latin American social policy more generally, see special issues of Social Policy and Administration, vol 40, no 4, 2006, Development and Change, vol 39, no 5, 2008.

²⁶ See Fine (2005a), and also, in much more detail, Fine (2002). As Riesco and Draibe (2007, p??) also put it:

[Welfare regime] typologies are always limited, and the welfare regimes approach has not been exempt from strong criticism ... Frequently, literature underlines the difficulty of applying such categories to countries other than Western Europe. Ironically, the arguments are sometimes contradictory. Some criticize the euro-centred bias of the historical association of the welfare regimes, which supposedly impairs their use outside the region. Others on the contrary, criticize the limited historicity, or inadequate generalization, of the welfare regimes. In this view, the three classic regimes of Esping-Andersen, based on the characteristics of only a small group of countries, would be insufficient to apprehend the characteristics of even other European countries, such as Italy and Spain ... Such wider perspective has identified, for example, peculiar features of countries in Southern Europe, through concepts such as *Southern Model of Welfare* or *Mediterranean Welfare State* ... This conceptualization, in turn has been accused of considering the cases of Southern Europe only as sub-species of the welfare regimes ... and to present their particularities only as expression of the embryonic or insufficiently developed character of their forms.

²⁷ Note, then, that this would precede recent developments in east Asian welfare provision. As Kim (2008, p. 109) puts it, without the benefit of factor analysis:

Before the welfare system in East Asia started to restructure itself around the Asian financial crisis, a variety of terms had been suggested to capture the distinctive features of welfare provisions in East Asian countries. Such terms included “Confucian welfare states” ... “a hybrid of conservative and liberal welfare regimes” ... and “Japan-focused welfare regimes” ... “productivist welfare capitalism” (PWC) ... is another term that seeks to define the uniqueness of the regional welfare system before the reshaping of the East Asian welfare system.

²⁸ But see Fine (2007b, Appendix 2).

²⁹ For some detail but in a different context, see Fine (2009a, Chapter 6). See also Fine (2005b and 2007c). In brief, the culture of social policy is constructed on the basis of contradictory material practices, in specific contexts, across a mix of chaotic meanings, which are construed, and contested by collectives, but with closure against some approaches as opposed to others.

³⁰ At a pinch, income transfers, pension provision for example, can still be understood as a *proposition* because of the chain of activities, and cultures, involved – who contributes and benefits, and how.

³¹ For Mexico, see Dion (2008, pp. 446/7) who closes:

This pattern of social insurance retrenchment and social assistance expansion in Mexico also illustrates one of the ways in which globalization pressures may lead to the redefinition of social protection. In particular, competitiveness concerns due to the globalization of markets may indeed create incentives for governments to retrench social protection policies – particularly employment based social insurance which can increase labour costs. At the same time, the government experiences pressure to compensate workers for the labour risks and income insecurity that can accompany liberalized markets, and in Mexico, non-contributory social assistance provides this compensation ... Finally, the process of gradual policy change in Mexico, including incremental reforms and layering of new policies alongside old, can cumulatively transform the character of social protection institutions. That is, a number of seemingly discrete policy reforms to pensions, health insurance and social assistance over several years and administrations, can lead to a fundamental redefinition of the organization and basis of social policy, as has occurred in Mexico over the last two decades. However, understanding the meaning and logic of this transformation requires studying seemingly unrelated policy reforms in different social welfare sectors rather than focusing narrowly on one policy to the exclusion of all others.

On Mexican pension reform, in comparative perspective with Canada and the United States, see Marier (2008).

³² See Hendricks (2008) for an outstanding account of how the South African state has ensured privileged pensions (of apartheid civil servants and new black elite) at the expense of national debt and more potentially progressive use of its expenditure. This might be thought to push beyond credibility the notion of depending upon the middle classes as beneficiaries in promoting favourable social policy for the impoverished. There is an issue of what is the tail and what is the dog here. As Hendricks suggests, the fully funded pension scheme involved runs against trends elsewhere (more dependent on pay-as-you-go), especially in the developing world, see above. The same is true of the extent to which South African government indebtedness has been internal as opposed to external, with the state pension funds accounting for an increase from R31 billion to R136 billion in respective total indebtedness of R66 billion and R297 billion between 1989 to 1996. Such studies reinforce the imperative of situating analyses contextually, on which for South Africa more generally, see Fine (2007b, 2008c-e, and 2009c-e).

³³ Available through <http://www.bepress.com/bis/announce/20090128/> More generally, see Kılıç (2008, p. 487), in the context of Turkey, on whether placing women on an equal footing with men can undermine previous advantages:

Until now, social security and labour regulations have provided women with special benefits and protections. Depending on the particular case, these gender-specific policies can be interpreted differently – as positive discrimination, satisfying practical gender interests, or as a reinforcement of traditional gender norms and relations, stigmatizing women as a weaker, vulnerable group in need of special protection. Ongoing reform initiatives, however, neutralize most of these long-lasting gendered policies, either by terminating rights formerly enjoyed only by women or by extending these rights to men as well. [Does] this changing nature of social policy ...[promise] equal citizenship for women or increases their vulnerability, in the absence of former benefits and without sufficient policy measures for improved capability.

³⁴ See http://en.wikipedia.org/wiki/Josiah_Stamp,1st_Baron_Stamp

³⁵ For Hall (2008, p. 799), on Brazil's CCT:

Bolsa Família could greatly increase patronage in the distribution of economic and social benefits and induce a strong dependence on government handouts. There are also early signs that it may be contributing to a reduction in social spending in key sectors such as education, housing and basic sanitation, possibly undermining the country's future social and economic development.

³⁶ Note that Bradshaw and Viquez (2008, p. 841) echo Molyneux's (2007) cry of "two cheers" for CCT programmes:

In education, the programme did succeed in improving enrolment and retention figures. However, given the limitations of the programme, the extent to which it improved stocks of human capital is questionable. The omission of any gender component also suggests a missed opportunity for improving the educational levels of girls, something warranted in terms of population and economic growth concerns. In health, the programme improved the uptake of preventative health care services and, in contrast to education, use of services appears to have continued after the demand-side initiatives ended. The difference in uptake seems to be not the demand-side conditionalities, but supply-side investment. This suggests that there is not so much a need to change the poor's "bad" behaviour but rather to facilitate their desire to behave "well" through initiatives that make services accessible and affordable.

See also Molyneux (2006).

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