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Source: *Annual Review of Sociology*, Vol. 13 (1987), pp. 109-128

Published by: [Annual Reviews](#)

Stable URL: <http://www.jstor.org/stable/2083242>

Accessed: 13-05-2015 10:35 UTC

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THEORIES OF THE WELFARE STATE

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Abstract

In the post–World War II era the apparent success of Keynesian economic principles in evening out the instabilities of the business cycle stimulated rapid growth in public welfare expenditures in Western capitalist democracies. For social science, welfare state expansion was not a puzzle but a given. When the economic crisis of the 1970s undermined faith in permanent and sustained growth in welfare programs, the new agenda for social theory concentrated upon the conditions that hindered or favored development. Ironically, both neo-Marxists and conservative economists reached the same conclusion: Welfare programs undermined profitability. The first half of this paper traces these theoretical developments, both in relation to internal debates among social scientists and in regard to external social and economic conditions that shaped the context of theorizing about the welfare state.

Underlying the broader debates about the factors influencing welfare state development has been a more specific concern with the exceptionalism of the American welfare state. Here the central agenda has been to explain why the United States was late in developing national welfare programs and why the programs that did arise contained a bifurcated structure that separated benefits for the poor from those available to all citizens as a right. Three explanations have emerged: the failure of organized labor, the legacy of American politics and the dualism of the American economy. This paper critically assesses the theoretical relevance of these arguments and their implications for recent attacks on benefit programs.

INTRODUCTION

Public welfare expenditures in Western capitalist democracies showed a rapid growth, beginning immediately after World War II and slackening only in the 1970s. Welfare state expansion was for social science not a puzzle but a given. With the West in the lead, it seemed only a matter of time before less developed nations would modernize sufficiently to develop the economic surplus and bureaucratic capacity that would allow them to initiate similar programs.

Strengthened by the Keynesian hypothesis that social expenditures for public welfare could stimulate aggregate demand and even out the instabilities and fluctuations of the business cycle, confidence in continuous expansion shaped theories of the welfare state around the issues of origins and growth (Janowitz 1976). Not until the energy crisis of the mid-1970s and subsequent stagflation triggered a questioning of the Keynesian consensus did a decline in welfare state expansion begin (Myles 1984a). Some economists, long persistent critics of welfare programs, attributed the economic crisis to excessive government spending. Their core argument was that the welfare state impinged on the profitability of the capitalist sector by acting as a disincentive both to work and to investment (Bosworth 1980, Fiedler 1975, Haveman 1978, McCracken et al 1977). Both welfare and macroeconomic control, these critics concluded, retarded growth by paralyzing markets. Governments increasingly accepted the monetarist economic doctrines and cut back on public expenditures, especially social benefits (Champagne & Harpham 1984, Gough 1979, Joe & Rogers 1985, Piven & Cloward 1982).

As the economic crisis undermined faith in permanent and sustained growth in welfare programs, social scientists no longer accepted welfare expansion as an inevitable concomitant of economic development or as a satisfactory solution to economic stabilization. Rather, the puzzling aspects of the welfare state became the new agenda for social theory, which now concentrated upon the conditions that hinder or favor development (Myles 1984a). Those still convinced that industrialization was the major factor in creating the welfare state now viewed those same variables that had previously explained program expansion—demographic change, need predicated upon dislocation—as impediments to growth (Gronbjerg 1977; Wilensky 1975). It is surprising that the neo-Marxists came to agree with the conservative viewpoint that welfare programs undermine profitability (Bowles & Gintis 1982, Gough 1979, Offe 1984a, b, Piven & Cloward 1982). In this paper I trace these theoretical developments, both in relation to internal debates among sociologists, economists, and political scientists and in regard to external social and economic conditions that shaped the context of theorizing about the welfare state.

WELFARE STATE GROWTH AND DEVELOPMENT

Prior to World War II, a few nations (Germany, the first) implemented welfare programs based on a social insurance model. In most Western nations, however, national welfare differed little from traditional relief systems, providing minimum benefits to ease the extreme poverty of the least privileged (Hecllo 1974, Perrin 1969, Quadagno 1982, Rimlinger 1971). But in the postwar era, social programs were transformed into more comprehensive systems of universal benefits, guaranteeing workers a basic standard of living (Myles 1984b). Sweden implemented major pension reform after World War II, indexing its program of demogrants and making it universally available, then adding a family allowance system in 1947 (Tomasson 1984). In England the 1942 Beveridge report, proposing a national minimum benefit to guarantee freedom from want for all citizens, stimulated legislation for family allowances, old age pensions, and health insurance (Myles 1984c). Germany's 1957 pension legislation contained three programs that covered the vast majority of the West German population (Tomasson 1984). By contrast, the United States still lacks a comprehensive national welfare system. Although the Social Security Act was passed in 1935, only old age insurance was a national program. Unemployment insurance, old age insurance, old age assistance, and aid to dependent children were all joint federal-state programs, which left the determination of eligibility criteria to the states. Most states maintained traditional relief requirements, including local administration, means tests, and family responsibility clauses (Quadagno 1984b, Skocpol & Ikenberry 1983). Not only was the American welfare state less generous than its European counterparts, its programs were bifurcated: social insurance for the majority; social assistance for the poor.

Why welfare states expanded in the postwar period is open to debate, but three factors seem most salient. The welfare state rests, first and foremost, on the availability of some form of reallocable economic surplus. The high level of economic development between 1945 and 1973 provided the economic means, Keynesian economics provided the rationale, while the centralization of the federal government during national wartime mobilization expanded national bureaucratic capacity (Janowitz 1976). For the next 25 years, Keynesian economic principles overrode the conservative view that a deflationary budget and tight monetary policies represented the road to prosperity (Kirchheimer 1965, Marwick 1968, Titmuss 1958).

In this era of post-war prosperity, Lipset (1960, 1974) concluded that the tension between the principles governing a capitalist society and political democracy had been eliminated, replaced by "the democratic class struggle," which made all social arrangements contingent on democratic mass politics.

Concepts of class and state, and the tensions between them, were submerged in the new consensus. Studies of welfare state formation reflected this perspective, minimizing the impact of class and state. The theory that evolved to explain welfare state development mimicked history, including a notion of continuous expansion and a basic optimism that welfare state programs and economic growth were in harmony.

The core argument of this thesis, sometimes termed “the logic of industrialism,” is that all industrializing nations, regardless of their historical and cultural traditions or present political and economic structures, become similar through an evolutionary process resulting from the impact of economic and technological growth on the occupational system (Kerr et al 1964, Lerner 1958). As industrialization proceeds, it creates new needs for public spending by reducing the functions of the traditional family and by dislocating certain categories of individuals whose labor becomes surplus—the very young, the old, the sick, and the disabled (Cowgill 1982, Form 1979, Pampel & Weiss 1983). Because traditional societal institutions are unable to meet the needs of these vulnerable individuals, the state expands more or less automatically (Cutright 1965; Jackman 1974, 1975; Wilensky 1975). As Wilensky (1975:xiii) explains, “Economic growth and its demographic and bureaucratic outcomes are the root causes of the general emergence of the welfare state.”

Adherents to the logic-of-industrialism thesis do recognize heterogeneity in national welfare programs, which they attribute to variations in surplus wealth, in thresholds of economic development, in the longevity of programs, in the representativeness of government, and in the ability of the state to extract resources (Flora & Albers 1981). But for the initial formulation of the thesis, heterogeneity was not an issue because researchers presumed that Westernization was inevitable. Not until the Keynesian consensus unraveled did explaining heterogeneity become a part of the intellectual program.

What makes it possible for industrializing nations to develop national welfare benefits? According to the logic of industrialism, social benefits became feasible because of the new wealth and expanded surplus created by the industrialization process and because of the development of an enhanced organizational structure—a massive state bureaucracy—through which benefits could be delivered (Goldthorpe 1969). Only nations at a particular level of social and economic development can develop welfare programs (Cutright 1965, Pryor 1968).

Studies questioning the inevitability of the relationship between development and the initiation of benefit programs forced industrialism theorists to qualify their conclusions (Williamson & Weiss 1979). In an analysis of 59

nonsocialist nations, Collier & Messick (1975) found little support for the argument that welfare states emerge as a by-product of industrialization. The least modernized nations in their sample initiated social security with less than 5% of the workforce in industry and less than \$51 per capita income. Social security was implemented at lower levels of development in later-developing countries, according to Collier & Messick, because the state played a larger role, discovering in such measures an easy way to tax citizens and a means of weakening labor movements. Similarly, in a comparative study of welfare state formation in Germany, Britain, France, and Italy, Hage & Hanneman (1980) concluded that the development of new vulnerabilities in the population does not, in itself, automatically lead to increased welfare expenditures. These needs must be translated into policy through some mechanism, the choice of which is related to the level of political development. Comparing 39 nations at various stages of development, Williamson & Weiss (1979) found that socialist party strength or labor union strength had a significant, indirect effect on the development of a welfare bureaucracy. Thus, the addition of class and political system variables undermined the argument that economic development alone can explain welfare state formation.

What ultimately wreaked greater havoc on the “logic of industrialism” were concerns regarding its basic assumptions. Formulated in a period when there appeared to be an organic unity between the welfare state and an industrialized market economy, the theory had until the 1970s an apparently solid empirical basis. The logic of the argument reflected the growth in both national GNPs and welfare state expenditures associated with the Keynesian welfare state. A distinct change of circumstances in the mid-1970s—the massive inflation following the Vietnam war, OPEC price policies, the collapse of detente—signaled the end of the Keynesian consensus (Myles 1984a, Offe 1984a). No longer, it seemed, were government expenditures able to bring about a balance between unemployment and inflation. For the first time since the Depression, high unemployment and unprecedented inflation persisted, with government seemingly helpless to control either (Offe 1984a, Piven & Cloward 1981). Conservative economists and neo-Marxists, strange bedfellows indeed, found themselves agreeing that the tenuous compromise between capitalism and democracy forged by the Keynesian welfare state had broken down and that public social benefits had become a fetter on the economy. The logic of industrialism contained a critical gap in its portrayal of historical development—it could not explain the struggle for power resources between classes and the political conflicts that arise from these struggles. Neo-Marxist theorists developed a new set of arguments to fill that gap.

THE CONTRADICTION BETWEEN CAPITALISM AND DEMOCRACY

Historically, there is nothing new in the liberal-Marxist consensus that capitalism and democracy represent contradictory principles of social organization. Such nineteenth-century liberal theorists as Mill and de Tocqueville feared that democratic mass politics would lead to class legislation by the propertyless, uneducated majority. Marx, too, recognized that the French democratic constitution of 1848 would withdraw political guarantees from the dominant class and give political power to the subordinate (Offe 1984a).

Yet capitalism and democracy have coexisted, and the central question has become: How is this possible? How can equality of citizenship coexist with capitalism, a system based on social class inequality (Marshall 1950)? Why hasn't the working class, now granted the full and equal franchise, translated its numerical strength into a revolutionary transformation of the state? The answer is twofold. First, class politics were transformed into competitive party politics and thus deradicalized. Deradicalization occurs because the prerequisites of mass democratic politics include the development of a bureaucratized and centralized organization, the expansion of the political base to include a more heterogeneous group of supporters, and the consequent erosion of collective identity (Offe 1984a). These manifestations of party politics limit the range of political aims and provide a virtual guarantee that the structure of political power will not deviate from the structure of economic power.

Second, the institutionalization of welfare programs transformed the pre-war pattern of industrial class conflict and led to "more economic, distribution-centered and increasingly institutionalized class conflict" (Offe 1984a: 193). The welfare state dispels the motives for class conflict otherwise implicit in the commodification of labor by granting concessions to both capitalists and workers. Workers must accept the legitimacy of the capitalist system, because a sufficient level of profitability and investment ensures an economic surplus that can be used to initiate welfare benefits. Capitalists, in turn, accept the need for basic wages and welfare state expenditures, because these benefits ensure a healthy and complacent working class (Offe 1984a). Thus, public social benefits represent a real gain for the working class, even though welfare programs also benefit capital.

Other neo-Marxist theorists take a more unidimensional view, emphasizing the functions of welfare benefits for capital. In their analyses, social welfare programs are the outgrowth of the basic imperatives that mold the activities of the state in capitalist society—the need to maintain profitability and the need to ensure social harmony. Welfare programs contribute to profitability by lowering the employer's costs of maintaining a healthy and skilled labor

force. By subsidizing the social expenditures formerly borne by the private sector, the state thus acts in the interest of capital. Welfare programs also contribute to the legitimation function of capital by containing worker unrest (O'Connor 1973, Olson 1982, Phillipson 1983, Trempe 1983).

According to neo-Marxist theory, the state can never develop a set of policies truly designed to meet human needs because these policies will invariably encounter the constraints of the capitalist economic system (Gough 1979). For example, if the state attempted to eliminate poverty by providing a higher minimum wage, this wage would soon surpass the wages paid to low-wage workers. If we assume that men and women prefer benefits over low-wage labor, then welfare would become a disincentive to work and would eliminate a source of cheap labor. Because it always has the potential to interfere with the free operation of the labor market, the welfare state embodies the contradictions of the capitalist mode of production.

A major gap in the logic-of-industrialism thesis was its inability to specify the mechanism by which benefit programs get enacted. This gap has been filled in what Shalev (1983) terms the "social democratic" model, whose basic premise is that "the growth of the welfare state is a product of the growing strength of labor in civil society" (Stephens 1979). Labor gains strength in a series of historical stages associated with the development of capitalism. Because capitalism requires a free labor market where labor can be bought and sold for a wage, the first right of labor is legal emancipation (Myles 1984c, Therborn 1977). From this fundamental cleavage, between those who sell labor and those who purchase it, the capitalist economy emerges. An emancipated labor force first organizes in the marketplace to demand wages beyond those prevailing in a free market and then carries the struggle to the state, where unionized workers capture the state through electoral struggle and use it as a vehicle to modify distributional inequalities (Cameron 1978, Shalev 1983).

A substantial body of evidence supports the social democratic view (Korpi 1978, 1980; Furniss & Tilton 1977). In many European nations, workers organized into political parties to implement aggressive social spending measures (Bjorn 1979, Cameron 1978, Stephens 1979). Further, numerous quantitative, cross-national analyses verify the thesis that nations with high union mobilization and stable leftist governments have the highest levels of welfare spending (Cameron 1978, Castles 1983, Castles & McKinlay 1979). Yet contradictory evidence undermines the power of the social democratic argument. Many studies, for example, concede that state power through social democracy is not the only route to welfare state growth and that socialist impact on welfare is at least somewhat conditioned by economic conditions and political system characteristics (Shalev 1983). Further, although the social democratic model only applies to advanced industrial democracies,

nondemocratic and noncapitalist societies also establish welfare states (Flora & Heidenheimer 1981). Another anomaly is that the social democratic agenda in welfare spending is not always consistent. As Parkin (1971:121) notes, "Social democrats have been more willing to broaden the social base of recruitment to privileged positions than to equalize rewards attached to different positions."

Parkin's argument does not undermine the social democratic position so much as it reflects the political realities of mass democratic politics. As organized labor attempts to implement socialist goals through competitive political parties, it is constrained by the need to expand the party base beyond the working class. As the party becomes more heterogeneous, it erodes the sense of collective identity of party members and limits the range of political goals (Offe 1984b). The inherent dynamic of the party system limits the content of all politics and "makes democracy safe for capitalism" (Macpherson 1977).

A basic social democratic principle is that in capitalist democracies the state and the economy are separate. Because of this separation, workers are able "to alter the distributional process in a manner that is independent of market criteria and the class principle; in effect, the market can be bypassed, and its rules of distribution made irrelevant" (Myles 1984c). In a more radical neo-Marxist view of the welfare state, the state and the economy are inextricably intertwined. The state is not, in this perspective, a neutral state, but rather a capitalist state that serves the interest of the dominant capitalist class (Gough 1979, Miliband 1969).

Why should the state act in the interests of capital rather than reflect impartially the interests of all groups in society? One answer is that members of the capitalist class dominate government and are thus able to act in their own best interests (Miliband 1969; Domhoff 1972, 1979). But different and potentially conflicting elements exist within this class, and the state cannot act on behalf of the long-term interests of the capitalist class as a whole unless it possesses a degree of autonomy. One way it achieves autonomy is through a division of labor between those who accumulate capital and those who manage the state apparatus (Block 1977, 1980). While capitalists are generally not conscious of what is necessary to reproduce the social order, state managers must be, for their continued power rests on political and economic order. The central constraint on the decision-making power of state managers is "business confidence." Individual capitalists make investment decisions on the basis of such tangibles as the price of labor and the size of the market as well as such intangibles as the political and economic climate. Business confidence falls during political turmoil and rises when there is a restoration of order. Since state managers are dependent on the investment accumulation process, they must use whatever resources they possess to aid that process (Block 1977).

Another perspective sees the state as the very embodiment of class contradictions (Carnoy 1984, Poulantzas 1978). As Poulantzas (1978:133) explains:

Each state branch or apparatus and each of their respective sections and levels frequently constitutes the power-base and favored representative of a particular fraction of the bloc, or of a conflictual alliance of several fractions opposed to certain others.

The contradictions between the dominant fractions imbedded in the state make it necessary for the state to perform an organizing function. The state thus becomes a mediating body, weighing priorities, filtering information, and integrating contradictory measures into state policy (Poulantzas 1978). But it can never be a neutral state, because it embodies class relations in its very structure (Carnoy 1984).

Some research supports the neo-Marxist view that the welfare state is largely a repressive social control mechanism. The German pension program established by Bismarck in 1889 served a dual purpose: It checked the threat of the working class and contained the power of the bourgeoisie (Rimlinger 1971, Tomasson 1984). Others have demonstrated that employers' organizations have sometimes initiated social benefit programs and that social expenditures by right wing parties are sometimes greater than those under left-leaning governments (Quadagno 1984a, Shalev 1983:). The apparently conflicting evidence over who initiates welfare programs can be resolved by recognizing that since these programs benefit both capital and labor, either class faction may be in a structural position at a given historical moment to establish them (Offe 1984a).

In Bismarckian Germany, state authority was the key factor in welfare state development; in France, too, the state bureaucracy maintained a balance between industrialists and agrarian groups (Rimlinger 1971). Yet a third perspective focuses on the state, emphasizing the influence of the state bureaucracy in initiating and expanding social welfare programs and the impact of existing social policies on subsequent policy decisions. In a period when state authority has become a powerful instrument for shrinking welfare benefits, it is not surprising to find convincing those arguments that redirect attention toward the state. As Skocpol (1980:200) contends:

States and political parties within capitalism have cross-nationally and historically varying structures. These structures powerfully shape and limit state interventions in the economy, and they determine the ways in which class interests and conflicts get organized into (or out of) politics in a given time and place.

STATES, PARTIES, AND POLICY PRECEDENTS

Adherents to the logic-of-industrialism thesis view the state largely as a passive instrument, which responds to the demands of various citizen groups

or to those made needy by the dislocations of industrialism (Gronbjerg 1977, Pampel & Williamson 1985). Social democratic theorists also see the state as manipulable, not by all citizen groups, but by labor unions organized into class-based political parties. Marxists, by contrast, view the state as an instrument of the ruling class. Yet a substantial and expanding body of research has demonstrated that the state is not merely a passive instrument through which various interest groups can press their demands; it is rather a major force in shaping the directions of social legislation (Amenta & Skocpol 1986).

At its most basic level, the state is defined in terms of the activities of the state bureaucracy. Several studies have found the state bureaucracy to be an important component of the policy formation process. In a comparative study of policy formation in Britain and Sweden, Hecló (1974) finds that policy innovations came primarily from civil servants. Two case studies of the development of the American program of old age insurance also indicate the importance of the state bureaucracy. Derthick (1979) examined the actions of program administrators in the Social Security Administration from its founding years to the late 1970s. She found a high degree of administrative autonomy in establishing and implementing program priorities, within limits circumscribed by the orientation of the party in power. Similarly, Cates (1983) found that program administrators contributed to the expansion of social insurance through concerted and ultimately successful efforts to contain the public old age assistance program.

Quantitative measures of state capacity support these case studies. Comparing twenty democratic capitalist nations, DeViney (1983) found that the degree of bureaucratization and centralization and reliance on direct taxation were the best predictors of welfare program expansion. DeViney's findings are backed by Flora & Alber (1981), who conclude that a strong state bureaucracy significantly influences the initiation of welfare programs.

A second thrust of the state-centered approach has been an emphasis on political learning. Policymakers do not base their agendas primarily on external demands; rather prior state actions shape future goals (Hecló 1974, Shefter 1977, Skocpol & Finegold 1982). As Hecló (1974:315) explains:

What is normally considered the dependent variable (policy output) is also an independent variable (in an ongoing process in which everything becomes an intervening variable) . . . policy inevitably builds on policy, either in moving forward what has been inherited, or amending it, or repudiating it.

The impact of policy legacies was one factor shaping the American welfare state. According to one interpretation, the prior existence of state-level initiatives in unemployment insurance, old age pensions, and mother's pensions prevented the Social Security Act of 1935 from being legislated as a single national program (Skocpol & Ikenberry 1983). Thus, state activity is not

merely a reflection of socioeconomically rooted demands, needs, and preferences, given expression by organized groups. Rather, policymaking is an inherently historical process in which "all actors consciously build upon or react against, previous governmental efforts dealing with the same sorts of problems" (Orloff 1985:27).

A third component of the state-centered approach asserts that historical variations in state structures shape the content and timing of policy initiatives (Skocpol 1980). The sequence of the timing of democratization and bureaucratization is a key determinant of the timing of benefit programs (Orloff & Skocpol 1984). The British welfare state developed early because Britain had a centralized state bureaucracy and credentialed civil service prior to mass democratization. Because of this juxtaposition of structural factors, political parties in Britain moved toward programmatic appeals to the electorate, among them social benefits. In the United States, in contrast, full democratization preceded bureaucratization. Until the struggle against political corruption achieved significant regulatory breakthroughs in the Progressive Era, public distrust for patronage-based parties obstructed major administrative reform.

The major criticism of the state-centered approach is that it deemphasizes the class nature of the state (Carnoy 1984); the impact on social policy of both labor and capital are minimized or discounted. Ruggie (1984) compensates for this theoretical gap by assessing state capacity through a typology, ranking what she terms the "liberal welfare state" low on state capacity and the "corporatist welfare state" high. In a liberal welfare state, "the proper sphere of state behavior is circumscribed by the functioning of market forces," and the function of public welfare is to ameliorate market dysfunctions (Ruggie 1984: 15). The result is incremental public policy measures and a fragmented structure. By contrast, a corporatist welfare state defines the parameters of market forces a priori, intervening not simply to compensate for inequality but to institutionalize equality. The result is a blurring of the boundaries between state and society. What determines state capacity, according to Ruggie, is the position of labor within the state. Thus, state capacity is not an abstract concept but evolves within a particular power nexus.

Although the state-centered approach provides a welcome corrective to the view that social insurance innovations were simply responses to socioeconomic dislocation or concessions to demands by trade unions, the hegemonic role of the administrative and coercive institutions of the state over its representative institutions needs to be treated as a variable that requires explanation rather than as an explanatory constant (Myles 1984a).

All of the theories discussed above deal either implicitly or explicitly with the present "crisis of the welfare state." Yet, with the exception of the industrialism thesis, none takes seriously the consequences of demographic change, or, more specifically, the issue of population aging. For most coun-

tries, pension expenditures are the most expensive of government social welfare costs, and the expansion of the aged population in the West has undeniably increased the welfare burden (Pampel & Williamson 1985). What social democratic and neo-Marxist theorists alike need to assess is whether the expansion of the older population, independent of conflict between workers and capitalists, has contributed to the present perception of crisis.

THE EXCEPTIONALISM OF THE AMERICAN WELFARE STATE

Whereas other nations have developed comprehensive national welfare systems, the United States still has not established national standards for most kinds of benefits, has maintained a bifurcated program of benefits distinguishing the deserving majority from the nondeserving poor, and has been unable or unwilling to coordinate social welfare taxing and spending with deliberate public interventions in the economy (Skocpol & Ikenberry 1983). Why the United States was late in developing national welfare programs and why those programs have been relatively inadequate has become a topic of debate among scholars intrigued by the broader issue of welfare state development in Western capitalist democracies (Orloff 1985; Orloff & Skocpol 1984; Quadagno 1988a, b; Skocpol 1984; Skocpol & Ikenberry 1983; Zald 1985). Three explanations provide some insight into the American case.

The Failure of Organized Labor

One explanation, stemming from the social democratic premise, is that the weakness of the American labor movement impeded the development of a national welfare state. Organized labor never formed a political party through which to press its demands, and American labor leaders adopted a philosophy of voluntarism that rejected social insurance (Rimlinger 1971).

The weak labor hypothesis is part of a broader argument about the absence of class-based politics in America. What is distinctive about American political development that has undermined a class-based political movement? Why did a labor movement that was once the most radical and violent in history never form an independent political party through which to advocate a socialist agenda (Oppenheimer 1985)? The answers have been diverse: opportunities on the frontier that diffused class conflict, the absence of a feudal past, racial and ethnic diversity that splintered the labor movement, early suffrage that demobilized working-class consciousness, the presence of an egalitarian, achievement-oriented ethos, and the greater opportunities for upward mobility available to the American worker (Davis 1980; Hartz 1974; Karabel 1979; Katznelson 1981; Laslett 1979; Lipset 1974; Sombart 1976).

Although the American labor movement did not form a political party, it

has not received credit for much of the concerted and successful political action it did engage in. Most analyses of organized labor have concentrated upon the stance of the national leadership, in particular the voluntaristic philosophy of American Federation of Labor President, Samuel Gompers. Yet most of labor's political activity prior to 1935 took place at the state rather than the national level, a natural product of the federalized structure of government (Fink 1975, Orloff & Skocpol 1984; Quadagno 1988b). And at the state level, labor unions did engage in political action. In the battle for old age pensions, for example, state federations, central labor bodies, and locals of the United Mine Workers worked for legislation for more than 20 years (Anglim & Gratton 1987, Quadagno 1988b). The greatest impediment to labor's political effectiveness in the pre-New Deal era was its persistent need to focus on organizational maintenance, rather than broader social issues because of employers' efforts to defeat the labor movement (Griffin et al 1986, Quadagno 1988b).

The lack of unionization among mass production workers, the source of much pro-welfare activism in European politics, must also be taken into account. Prior to the New Deal, the AFL showed little interest in organizing industrial workers, but the most significant effort for state welfare legislation arose from the one strong industrial union, the United Mine Workers (Quadagno 1988). After World War II, however, the CIO's newly won collective bargaining rights directed the union's attention toward private rather than public sector benefits (Piore & Sabel 1984, Quadagno 1988b, Tomlins 1985). To the extent that industrial workers influenced the expansion of the American welfare state, their impact was indirect, as increases in private sector benefits reduced employer resistance to public sector expansion. The intersection of public and private sector benefits, a topic that has received little attention in the literature on the welfare state, deserves further exploration.

Finally, several studies indicate that the most militant expression of working class unrest has come not from organized labor but from racial insurgency and urban riots (Griffin et al 1983; Isaac & Kelly 1981). In the US post-World War II era, mass insurgency has contributed to increased levels of welfare spending; in this the state shows its central concern for the maintenance of order and social harmony.

The Legacy of American Politics

A second line of argument attributes the underdevelopment of the American welfare state to the legacy of previous policy precedents. According to Orloff & Skocpol (1984), the early democratization of the US electorate created a patronage system in which government outputs took the form of distributional policies. Patronage spending peaked under the Civil War pension system, when a substantial portion of the federal budget was expended on a corruptly

administered program. With the central government weak and the state bureaucracy virtually undeveloped, reformers doubted that social spending measures could be implemented honestly. Fears by citizens of further patronage abuses in benefit programs undermined public support for national social programs and thus delayed the onset of the American welfare state (Orloff 1985).

Previous policy precedents also influenced the structure of the Social Security Act and set limits on subsequent policy developments (Skocpol 1984, Skocpol & Amenta 1985, Skocpol & Ikenberry 1983). As Skocpol (1984:9) argues, New Deal reformers were strongly influenced by Wisconsin policymakers, who believed that “open-ended governmental handouts to citizens must be avoided, for these could fuel political corruption and unbalanced budgets.” Wisconsin policymakers were committed to keeping public assistance programs for the poor separate from social insurance programs that workers would earn as a matter of right. Of all the programs enacted under the Social Security Act, only old age insurance became a national program. The others—old age assistance, unemployment insurance, and aid to dependent children—were legislated as joint federal-state initiatives because existing state programs and policy initiatives in these areas undercut efforts for a totally national agenda (Skocpol & Ikenberry 1983). Once the programs were in place, administrators in the expanding state bureaucracy, imbued with the Wisconsin ethos, resisted expanding the old age assistance program for fear it would become a viable alternative to old age insurance (Cates 1983).

All Western capitalist nations are cognizant of “the fiscal crisis of the welfare state.” In the United States, however, the bifurcated structure of the American welfare state has focused attacks on welfare spending primarily on programs for the poor. The New Deal legacy created a virtually untouchable old age insurance program for the majority. By excluding agricultural workers from coverage in OASI and unemployment insurance, however, the Social Security Act left most blacks uncovered. This initial program structure left the assistance programs for the poor politically vulnerable, and it continues to affect the adequacy of protection for blacks (Skocpol 1984).

The Dualism of the American Economy

Yet a third argument links welfare to the labor process. Employers have traditionally used welfare to manipulate the labor supply. For example, the key features of the English poor law—local autonomy in administration and the requirement of local residency—allowed landlords in their dual capacity as poor law authorities to maintain a local labor force by controlling the relationship between wages and relief benefits (Quadagno 1982). Benefits

were kept below wages so as not to undermine work incentives, while workers could be removed from relief whenever they were needed to work the fields or harvest the crops. Similar uses of welfare can be found in relief programs in the United States in the early poor laws (Quadagno 1984b), in old age assistance (Quadagno 1988a) and in AFDC (Bell 1965, Piven & Cloward 1982). Thus, relief programs have historically maintained a pool of marginally employed, low-wage workers.

In the United States industrialization progressed at an uneven pace. In the North it created a labor force of semiskilled and unskilled workers, who formed into national labor unions and negotiated with employers for improved working conditions, higher wages, and social benefits (Gordon et al 1982). Northern workers also formed a coalition with the Democratic party in the years following the New Deal to press for supportive labor legislation and to demand benefits from the state (Bensel 1984). In contrast, until midway through the twentieth century, the South had few of the characteristics identified as necessary for welfare state development: industrialization, democracy, political parties, and a working class capable of pressing for social benefits. Economically and politically isolated from the rest of the nation, members of the Southern planter class took advantage of the peculiar structure of the American political system to form what Southern statesman John Calhoun termed a "concurrent majority," that is, a minority able to exercise negative power over the majority (Sydnor 1948). In the twentieth century, they used this negative power to impede national welfare programs (Alston & Ferrie 1985, Quadagno 1988a).

Why did the South resist national welfare legislation? The answer lies in the political economy of the cotton South. As the North industrialized, the South remained primarily agricultural, with Southern cotton planters dependent on massive numbers of unskilled black workers. The system of tenancy, which developed after slavery was abolished, guaranteed planters control over a subservient, primarily black labor force (Mandle 1978). Any flow of benefits into this system would have disrupted the planter-tenant relationship and undermined the planter's paternalistic control (Alston & Ferrie 1985).

How did the South, a region which contained less than 25% of the total population until 1969, exert a controlling, negative influence on national legislation (Potter 1972)? The answer lies in the organizational and procedural structure of the congressional committee system and in the status of democracy in the South. When we speak of the early democratization of American society, we tend to forget that full democracy did not exist in the South until the Voting Rights Act of the 1960s. The turn-of-the-century disenfranchising conventions had reduced the Southern electorate to less than 20% and in some states to less than 12% (Woodward 1951, Key 1949). Disenfranchisement also effectively eliminated two-party democracy in the South. As a result,

Southern politics were conducted by amorphous factions within the Democratic party (Key 1949).

One-party democracy, Southern-style, also gave Southern congressmen enormous political power on the national scene. The right granted committees to refuse to report a bill out, and the seniority system which served as the basis for selecting committee chairmen, gave Southern congressmen control over key congressional committees for decades—Southern congressmen who often ran unopposed were consistently reelected to office (Potter 1972). All social benefit programs had to pass through the House Ways and Means and the Senate Finance committees, both Southern-controlled until the 1960s. Two studies of the Social Security Act conclude that Southern congressmen impeded the establishment of more generous benefit programs by insisting that agricultural workers be excluded from the national old age insurance program and by eliminating federal controls and regulations from the joint federal-state programs (Alston & Feree 1985, Quadagno 1985, 1988a, b). It was not until the Civil Rights movement undermined the coalition of urban labor and Southern politicians in the Democratic party that the influence of Southern congressmen on national legislation was reduced.

The three perspectives on American political development discussed above are not necessarily contradictory. Rather, each addresses different influences on welfare state formation. Any comprehensive analysis of the development of social benefits in the United States must include analyses of the impact of organized labor, of policy legacies, and of the existence of two distinct economic formations within a single nation state.

CONCLUSION

Welfare programs are not a unique feature of advanced capitalist nations, although they are sometimes treated as such. Since at least the sixteenth century, all Western societies have developed methods of dispensing sustenance to their more vulnerable members. What has changed is the method of providing social benefits, as welfare was transformed from locally financed and administered systems of labor control befitting a rural, labor-dependent society to nationally financed and administered programs of benefits for citizens of industrialized nations. The transformation of form, however, does not mean that the labor control functions have disappeared. Rather, they have been structured to fit the logic of the new industrial order. In seeking an explanation of “the welfare state,” we would do best to reconstruct our understanding of social welfare. Instead of looking for correlations between variables, we must examine the underlying functions welfare programs provide. Thus, one agenda for future research might be to examine how changes in benefit programs are related to changes in the labor process.

Although many countries in the Western world are presently weighing the

relative costs and benefits of welfare state programs, in the United States these attacks have focused most intensely on the income maintenance programs for the poor, most of which disproportionately aid women and minorities. The bifurcated structure of the American welfare state is not predicated solely on class but also on race and gender. The legacy of the South partially explains why blacks have fared poorly under public programs in the United States, but much of the research on women's welfare has not been incorporated into debates about the welfare state (O'Rand & Henretta 1982; O'Rand & Landerman 1984; Pearce 1978; Pearce & McAdoo 1981; Scott 1984; Treas 1981). Future research on the welfare state must begin to take both race and gender into account as major variables that cut across class-based divisions. To the extent that monopoly capital and organized labor have achieved some consensus in American society, it has come about at the price of excluding workers, often women and minorities, in low-wage, nonunionized industries, from equal access to full social insurance benefits (Friedland 1976).

ACKNOWLEDGMENTS

I am grateful to John Myles for providing comments and suggestions for revisions on an earlier draft of this manuscript and to Charles Tilly for helping to focus the direction of the essay.

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