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Universalism: and idea and principle in social policy

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Introduction

Universalism is a concept widely used in social policy and welfare state literature. By universalism a reference is often made to certain kind of redistribution of resources in a society. Even if many scientific analyses around universalism have been made, researchers have not arrived at any broadly accepted definition or conclusion over the concept; and therefore commentators understand the concept of universalism in different ways. Such confusion complicates assessments concerning universalism. It is difficult to discuss the importance or the consequences of universalism if we do not have any widely shared idea what it means. Yet, our point of departure is that universalism is a central concept in social policy research.

Our aim is to clarify what universalism means, how the concept is used within social policy research and what makes a regime or a benefit universal. Besides conceptual analysis we are interested in universalism as a social policy principle. Thus, it will be approached both as an idea or ideal and as an administrative social policy principle (or logics or rationale) affecting the distribution of social benefits (cash benefits or services in kind). We also want to know what is the future of universalism and universal social policies? To answer these questions we have to start by carefully analyzing the ways the concept of universalism has been used in social research.¹

We would like to stress that universalism is a context-bound concept that means different things in different times and places and in connection to different benefits. However, in spite of this contextual variety the concept also retains its essential core by always referring to something that is common to “all people”. Basically the concept of universalism is used to make a major distinction to other kind of social policy ideas and principles, most often to those of residualism, marginalism, selectivity, and particularism. Often the concept of universalism has been needed to serve a political aim, which obviously gives the concept a particular flavour.

To better understand the different dimensions and meanings attached to universalism we have to pay attention also to other foundational ideas and distributive logics. Sometimes it would easier to say what universalism is not than what it is about. It is also important to

¹ We recognise the importance of universal utilities (roads, water pipes) and public services (physical protection of human beings and the environment) but do not discuss them. To avoid overstraining the readers and us we also skip the question of financing the social expenditure.

remind that in the comparative welfare state research, especially during the post-war decades, the concept of 'institutional' was widely used in quite a similar meaning as universal. Thus, there are some parallel concepts one could use instead of universalism, such as institutionalism or generalism. However, there seems to be a fairly strong consensus over the fact that universalism has been a core value and leading principle behind social policy reforms in the Nordic countries. By extending social insurance to cover the whole population instead of compensating only the wage earners for lost income Nordic countries attempted to break loose from the stigmatising poor relief tradition and dispersed insurance funds, and by establishing universal access to basic welfare services these countries further promoted equality and solidarity between classes and especially between women and men (see Kildal & Kuhnle 2005).

A number of researchers have noted that the role of universalism has been declining rather than increasing, mainly because of economic and political reasons (Clayton & Pontusson 1998; Cox 1998; Langan 1998; Kemshall 2002; Timonen 2003; Mkandawire 2005, 2).² Some researchers, particularly in the Nordic countries, tend to think that the weakening of universalism is a major loss for citizens and for the overall rationality of social policy systems (Sunesson et al. 1998; Rothstein 2001). Some others, however, seem to think that we should not yearn for the golden years of universalism.

It was in the beginning of the 1990s when Williams wrote that "the fragmentation of class politics and the development of identity politics implies that demands upon welfare provision will be about meeting the specific needs of particular groups, rather than about pressing for universal provision to cover the need of all" (Williams 1992, 206). She also raised into discussion the notion of 'false universalism'. By the concept Williams pointed out that the post-war welfare state in Britain was based primarily on the interests of male workers and breadwinners (Williams 1997, 13). Feminist scholars, in particular, have raised critical questions and argued that universalism was a significant principle when traditional class societies had to be dissolved. However, the increasing importance of dual breadwinner model, single parenthood, multiculturalism and cultural diversity among other things challenge the grand idea of universalism (Williams 1992; Pratt 1997; O'Connor, Orloff & Shaver 1999).

Universalism is a contested concept and principle. There are scholars who give a strong support to universalism and those who tend to think that there are a number of problems not only with the language of universalism but also with universal social policies that is not sensitive enough to cultural and social diversity typical to late modern societies. It is however difficult to agree or disagree with the different views presented above, because we should first arrive at a proper definition of universalism.

² Some findings question the conviction that universalism programs are declining everywhere (Bergh, 2004, 762).

Most concepts used within social theory tend to be tricky because of their multidimensionality. This is much the case also with universalism. It is a deeply normative concept and principle that arouses political and ideological emotions, which do not facilitate the search for common meanings. As mentioned, even today scientists do not agree whether certain social policies or benefits should be called universal or not. Chiefly, this is a consequence of the fact that the word “universal” has been used in different frames of reference (Kildal & Kuhnle 2002, 14), in different times, and for different purposes. In addition, universalism is a theoretical and political struggle concept that is closely linked to visions of good society.

In this article we will examine universalism from four different viewpoints:

- universalism as the interest of the state
- universalism as policies aiming for economic equality and national integration
- universalism characterizing a welfare regime
- universalism as a feature of social benefits.

In the end we appraise the state of universalism as a principle of social policy regarding these discourses and present drivers of change. Our article approaches universalism from a broad perspective so that different dimensions, debates and contradictions are taken into account.

Break through of universalism: post-war welfare state in Britain

Improvements in the position of the working class softened tensions between the social classes and increased the possibility to develop new social policy arrangements. There was more of political space, particularly during and after shattering wars, to create integrating political compromises, which on their part further reduced tensions between the classes. In social policy literature the Swedish national pension system (1914) is most often presented as the first social policy program that covered all the citizens. The main motive of the reform was however to rationalize poor relief (Edebalk 1996, 69-82). The reform did not represent any radical turn in the history of universal social policies and citizenship [more about this].

Immediately after the First World War some researchers suggested that the idea of social policy should be thoroughly reformed. Authors like Thörnberg in Sweden, von Wiese in Germany, and Pesonen in Finland, suggested that any citizen could be the object for social policy. This view became dominant after the Second World War (Nieminen 1955, 60-73) as Britain developed both a new political argumentation (language of universalism) and new kind of social policies (universal benefits).

At the time of beginning of the Second World War there were strong calls for social justice, for the abolition of privileges and for a more equitable distribution of income and wealth (Titmuss 1958, 82). They were followed by the famous Beveridge Report (1942) that presented

the idea of reconstructing a new social order, a 'welfare state' or a 'social service state', by providing minimum benefits to all elderly, unemployed, mothers and ill. According to the report all citizens would contribute to the social insurance system if they could and all citizens would be entitled to necessities: health, knowledge, food and shelter. Justice would also be done to non-working housewives. Equal opportunities of access would mean a great progress compared to the pre-war society in which families and voluntary organisations were incompetent to eradicate Beveridge's five giants: disease, squalor, ignorance, idleness and want (Beveridge 1942, 6-15).

Beveridge spoke strongly for the universal distribution of social services, since all ran the risk of unforeseen poverty the provision should be universal. These lines of thinking lead Beveridge to support both flat-rate contributions and flat-rate benefits. He also believed that national minimum was attainable: '... sufficient without further resources to provide the minimum income needed for subsistence in all normal cases' (Beveridge 1942, 121-122). In fact, this goal became easier to achieve because the unemployment disappeared during and after the war (Thane 1982, 246-249).

According to Titmuss it was the war that gave an impetus to the revolution in social welfare thinking. In this spirit he describes, for instance, the change of attitudes of parents towards milk-in-school schemes. In place of a relief measure, tainted with the poor law, it became a social service (Titmuss 1950, 509-511). Thane (1982, 263-267), however, is more cautious with explaining the change by the war. There were similar initiatives before the war and the opposition to the reforms did not vanish because of the war. According to her interpretation the main reasons for the impressive acts during and after the war were the wartime pressure on health care, the lack of unemployment, the desire to avoid wage increases, and finally the fact that Labour in 1945 for the first time formed a government with large majority (Thane 1982, 229-230, 263-267).

"One fundamental historical reason for the adoption of this principle [universalism – AA and JS] was the aim of making services available and accessible to the whole population in such ways as would not involve users in any humiliating loss of status, dignity or self-respect. There should be no sense of inferiority, pauperism, shame or stigma in the use of a publicly provided service" (Titmuss 1976??, 129).

"If these services were not provided by everybody for everybody they would either not be available at all, or only for those who could afford them, and for others on such terms as would involve the infliction of a sense of inferiority or stigma" (Titmuss 1968, 129).

The universal character of the British acts that were stipulated in the 1940s has been abundantly analysed later on. Langan, for instance, assesses that the boldest claim of the post-war welfare state was that its services were universal. All welfare services were available free at point of delivery to everyone according to their need. There would be common standards

in the provision for universal needs, without the historic restriction of the market system on access to goods and services – the capacity to pay (Langan 1998, 8-10). Access to, and experience of, health care, education, income maintenance, housing and so on was seen to be so important in determining the nature and quality of everyone's life experiences that allocation cannot be left to command over resources in markets (Pratt 1997, 201).

Concurrently, by the new principle of universalism adopted in the post-war social policies in Britain a new emphasis was given to the idea of social citizenship; a focal aim for the welfare state was the desire to promote a sense of belonging and good order in society. The other side of the coin was that promoting universalism and equal citizenship within social services, in particular, was not possible without paternalism: needs had to be defined and unified (Langan 1998, 10). The criterion of need as the basis of resource allocation would be a range of relatively objective criteria (Pratt 1997, 198). The measurement of needs may be simple in primary education, but in case of health care such measurements cannot be made but by professionals. The necessity to give professionals the authority to control the demand of free services was a problem that did not vanish during the decades to come. Thus, according to Langan (1988) universalism has increased professional power and brought into being new kind of paternalism.

There are also other problems identified fairly earlier on with universalism. Beveridge noticed that the universal public goods could not cover all the needs. There would be a new program called National Assistance for means-tested benefits. However, Beveridge and the government anticipated that such benefits would become of marginal importance in a full-employment labour market (Langan 1998, 10). It was thought that safety net of selective benefits would shrink during an age of planned social improvement (Kemshall 2002, 27-28). In this respect, universalism was an ideal or utopia towards social policy arrangements were to be developed.

A third limitation with universalism was a confined understanding of citizenship. The framework of benefits that prevailed for years after the war assumed the model of a working man earning a family wage to enable him to support his non-working wife as well as any other dependants (Langan 1998, 11; Lewis xxxx; Lister xxxx, Williams xxxx). The idea of dependency led up to strange outcomes: the British National Insurance (1946) did not grant full social rights to married women, which in practice meant that working married women had to pay unfairly high contributions compared to their benefits. Another bizarre example was that the daughter of low-income parents studying at the university was entitled to an allowance but the son was not (Titmuss 1958, 42, 49).

Titmuss has been called 'the high priest of universalism' (Pratt 1997) but we have to make here two reservations. First, his main criticism was against the technologies of poor relief

(individual means tests)³ but not against the income related benefits. Second, in his early publications he did not speak of universalism at all. His famous distinction between the three welfare models of social policy does not recognize the concept of universalism. He named the types residual, industrial-achievement, and institutional (Titmuss 1965 or 1968).

Universalism was however the concept that gradually gained more popularity. The euphoria of national integration did not sustain after the war. Already before the war there had been a contradiction in political attitudes as British Conservatives advocated means-tests and actuarial insurances whereas Social Democrats supported universal distribution of public goods. New acts by the Labour government were followed by bitter conservative criticism against the 'welfare state' that had been established too quickly and on too broad a scale: social service without test of need wasted money, scaled down voluntary services and increased the power of the state (Titmuss 1958, 34-37). In 1951 conservatives came back to power but surprisingly they did not tamper with the legislation. Labour continued to speak for universalism although with declining enthusiasm (Pratt 1997, 208-212).

In the 1950s Titmuss himself had become convinced that the Beveridge flat-rate system was a brake on the development of an adequate state pension system and started to support earnings-related contributions with a redistributive effect so that higher-paid people would pay relatively more (Thane 1982, 373-374). Soon the social policy researchers also found problems in the other end: universal benefits did not reduce the inequality of income enough, poverty prevailed in spite of them (e.g. Abel-Smith & Townsend 1965; Townsend 1979). The demand for selectivity and individual targeting came also from the political left.

The discourses on universalism in post-war Britain illuminate that it is important to make the distinction between three kinds of public goods: those targeted for the poor, those based on employment, and those aimed for all citizens. However, as the concept of universalism was rather used for making politics than for scientific analysis, it could not resolve what kind of a public good should be called universal. The negligent use of the concept and its synonym 'institutional' also carried motives for further difficulties and criticism against universalism.

The story of Britain is not unequalled, in general outline similar stories of the development of universal policies to relieve the basic social contradictions between the working class and the bourgeoisie or between the industrial workers and farmers, and raising all people into the status of citizens, could be told for almost any Western countries. Sometimes this story has included women too (Anttonen 2002; Kettunen 2008). In the Nordic countries, the idea and politics of universalism responded much better to the interests of women and women's movement. However, in Norden universalism became a leading principle only during 1960s and 1970s. In this respect, Britain represents quite an exceptional case in the history of universal social policies.

³ If the lack of personal means testing were the criterium for a universal benefit the British child allowance introduced in 1909 for all children aged under 16 for those whose incomes were under £500 might have been the first one.

The universal Nordic welfare model

When describing the Nordic welfare model and social policy, reference is most often made to the principle of universalism. According to Kindal and Kuhnle (2005) the guiding principle of Nordic social policies is universalism. This means that the Nordic countries “have set out to develop a welfare state that includes the entire population... The universalist Nordic welfare model is often described as the ‘social democratic model’ or ‘social democratic regime’ (Esping-Andersen 1990).

The Nordic universalist welfare model was brought into discussion fairly late by comparative welfare state scholars. Thus, it lacks the same kind of strong political and normative ethos that was typical to post-war welfare state debate in Britain. If universalism lost much of its earlier importance in Britain already in the 1970s and 1980s, in the Nordic countries the same time period witnesses that universalism became the leading doctrine, idea and principle. Universalism has gradually become nearly parallel with the notion of Nordic in social policy literature. This way the language of universalism becomes more ambiguous and complex. Universalism is an ideal and political goal to be achieved by universalist solutions in social policy.

The notion of universal welfare model is however something that has been used only very recently. Up until mid 1980s the distinction between the institutional and residual model was the most important one. In his book of *The Democratic Class Struggle* Korpi (1983, 190-192) presented that marginal and institutional policy models can be seen “as ideal types representing two opposite poles on a number of sub-dimensions”. Typical dimensions to the marginal model are for instance low proportion of GNP for social purposes, minor importance of programmes preventing needs, extensive use of selective social policies, major role of private organisations and dominant financing basing on fees, while typical to the institutional policy model are the following features: high proportion of GNP, major importance of preventive programmes, extensive use of universal social policies, minor role of private organisations and financing basing on taxation.

In his classification universalism is defined as one major dimension of institutionalism. It has a special importance in the way (re)distribution of resources is made in a society. Universalistic measures are directed towards large sections of population, while selective policies are directed toward subgroups of the population with specific needs. According to Korpi “in areas where universal programmes exist, institutional social policy decreases inequality by making it possible for lower socio-economic strata to enjoy roughly the same standard as other groups”. Universalism is thus a precondition for equality of citizens and universalist social policies part of democratic class struggle.

The distinction between residual (or marginal) and institutional model had been a dominant classification since 1950s. The distinction between residual and institutional social policies was used already by Wilensky and Lebeaux (1958, 138). They wrote that “two conceptions of

social welfare seem to be dominant in the US today: the *residual* and the *institutional*. The first holds that social welfare institutions should come into play only when the normal structures of supply, the family and the market, break down. The second, in contrast, sees the welfare services as normal, “first line” functions of modern industrial society.”

Esping-Andersen and Korpi (1987, 40-41) lean strongly on this distinction while defining what Nordic welfare model is about. They start by writing that “the marginal model is premised on a commitment to market sovereignty. In this model the state plays “only a minor role in the distribution of welfare. A marginal social policy assumes that the vast majority of the population can contract its own welfare, and that the state needs only step in when the normal channels of distribution fail”. Normal channels are those of family and market. Marginal welfare systems use targeted measures and take care only of what is defined as residual.

Institutional model is contrasted to the residual one. “The underlying view is that the welfare of the individual is the responsibility of the social collective: the family’s or market’s capacity to secure an optimal distribution of welfare is seriously questioned. Moreover, the institutional model promotes the principle that all citizens should be equally entitled to a decent standard of living, and that full social citizenship rights and status should be guaranteed unconditionally.”

Institutional model covers all citizens and universal solutions are favoured instead of residual ones. In addition, need for universal social policy is justified starting from the needs of individual rather than from the needs of society or state. By this argument a major distinction is made to post-war British institutionalism, that of flat rate universalism.

Esping-Andersen developed further the distinction between marginal and residual model and arrived at his famous regime theory. The institutional model is renamed by social democratic regime alongside liberal and conservative regimes. According to his definition the social-democratic regime-type is solidaristic, universalistic and de-commodifying (Esping-Andersen 1990, 28). In his account of welfare regimes Esping-Andersen leans strongly to the distinction proposed earlier by Titmuss (1974), who distinguished three system-types in social policy, those of residual, industrial-achievement, and institutional ones. Accordingly, it is understandable that ‘institutional’, ‘universal’ and ‘social democratic’ are nearly synonymous concepts even if the notion of institutional has nearly vanished from welfare state literature. Nordic scholar often use the labels of ‘universal’, ‘social democratic’, and ‘Scandinavian’ welfare state to describe roughly the same thing (e.g. Bergh 2004).

Today, universalism is much more than a label or an attribute of the Nordic welfare model; it also has served as a standard explanation for the superiority of the model. “As an alternative to means-tested assistance and corporatist social insurance, the universalistic system promotes equality of status. All citizens are endowed with similar rights, irrespective of class or market position. In this sense, the system is meant to cultivate cross-class solidarity, a solidarity of the nation.” (Esping-Andersen 1990, 25). The conclusion made by Esping-Andersen and many others is that the high degree of universalism explains the fact that the

Northern European democracies have the most advanced welfare systems safe-guarding citizen's social rights.

Mikko Kautto et al. arrive at the same conclusion by arguing that the principle of universalism is an important reason for the high equality in the Nordic countries (Kautto et al. 1999, 11). However, in his definition universalism is only one of more than ten dimensions attached to the Nordic or Scandinavian model. Mikko Kautto et al. write that "in an earlier contribution to defining the Scandinavian model the corner stone in social policy was stated to be universalism". He is not denying the importance of universalism nor placing it in the centre of analysis.

Even if there is no clear consensus over the analytical power of universalism, it is fair to argue that in the Nordic countries universalism has been one of the most important pillars of modernisation of social policies. By extending social insurance to cover the whole population instead of compensating only the wage earners for lost income Nordic countries attempted to break loose from the stigmatising poor relief tradition. By establishing universal access to basic welfare services these countries have further promoted equality and solidarity not only between social classes but most particularly between women and men.

It is important to remind that even in Scandinavia universalism is not complete, although there are more universal benefits and services than in most other countries (c.f. Anttonen 2002, 71, Kautto et al. 1999; Rothstein 2001, 218). In this respect universal state is an ideal type or we can also think that a welfare state can consist of different programs with varying degrees of universality (Rothstein 1998, pages). Clayton and Pontusson (1998, 76) estimate that only three of the major social policy programs are truly universalistic: those of family allowances, health care, and the basic pension system. In fact, there is not any single country in the world, whose all social policy institutions would be universal. Also in the Nordic welfare societies the redistributive mechanisms of residualism and means-testing are in use, for example income support and housing allowance are means-tested benefits. Moreover, the occupational (or the industrial-achievement) principle is widely applied in pension schemes, unemployment benefits and sickness insurance. It is also worth to mention that benefits paid to all are often so called flat rate benefits whose value in money terms is much lower than those of earnings-related benefits. All citizens are included into social security programs but in different terms. [This question will be discussed in detailed in the next version].

Since Esping-Andersen introduced his regime theory, it has become much more common to identify the Nordic welfare model with universalism. In reality, however, there are no one-dimensional nations in the sense of a pure case, reminds Esping-Andersen. Still, it is reasonable to argue that some countries are closer to the idea of universalism than some others. Some scholars tend to think that universalism however is the founding or guiding principle the Nordic model and even use the concept of universal welfare state (Bergh 2004; Kindal & Kuhnle 2005).

This kind of change in vocabulary might suggest that universalism has become even more important than it used to be. Welfare state researchers have presented long lists of qualities that are typical to the Nordic countries saying that they also are dimensions of the universal model. Mostly the qualities incorporated in the universal model are connected to the universal coverage of public social goods. Other dimensions mentioned are for instance taxation-based financing, statutory regulation, large social expenditure, and lower value given to need-based distribution and voluntary arrangements (Sainsbury 1991). But it is not easy to agree that universal benefits and services are always adequate, preventive, and that they reduce the role of private organizations. There are also in the Nordic countries major problems with equal distribution and inequality. These problems have become more profound during last 15 years.

Universalism, class, gender and other social divisions

The rise of universal social policies is closely connected to cross-class solidarity and alleviation of class conflict. This has been extensively discussed in the previous sections. There are scholars who have argued that universal categories and modes of social policy are however masculine and constructed to serve the welfare of male citizens (Hillyard & Watson 1996, 323-324). In feminist scholarship on social policy it is typical to think that social policy is split into feminine and masculine spheres, so that men are treated as workers (universal citizens) whose social risks are covered by social insurance schemes; and women are treated as mother-carers who are primarily in need of protection and counselling. Often childrens' and women's needs are met by universal flat rate benefits or by residual measures. Accordingly, men's social rights seem to be much better established than those of women.

Against this background we might think that the whole language of universalism represents male values and classifications. Historically this might be true, because in most countries women's citizenship became defined through motherhood and caring, and these particularities did not fit into the masculine language of universality (Anttonen 1997; Lister xxxx). Yet, the idea of universal citizenship was not totally split up to masculine and feminine parts, but allowed the combination of these two. At least in the Nordic countries the idea of universal citizen was defined as a productive and responsible man or woman whose duty is to serve the nation (Anttonen 1997).

In most countries modern social policies have been built upon the basic idea of compensating the wage earner for lost income. There can be no doubt that the institutionalisation of worker's social rights in the beginning of 20th century was an important turning point in the redefinition of citizenship and social policy. Worker's social rights can be seen as forming an essential part in the process of modernisation in which men as well as women attempted to break loose from the premodern and paternal social order. One part of this order was stigmatising poor relief practice. The emergence of a modern welfare state in post-war Europe was closely connected with the changing status of citizenship. The grand idea of social citizenship was introduced by T.H. Marshall (1950), who posited a relationship between class

and citizenship in his famous sequence of civil, political and social rights. The Marshallian doctrine of social rights can be seen as an expression of a change in liberalism's vocabulary of citizenship in England. Marshall's definition constructs the citizen as a member of a community.

Among others Esping-Andersen has developed further the classic formulation of social citizenship in the Nordic context. One of the main ideas in Marshall's theory is that workers in obtaining political rights were able to establish social rights through the exercise of political power. According to Esping-Andersen social democracy was clearly the dominant force behind social reforms and social rights in the Scandinavian countries (power resource theory). Rather than tolerate a dualism between state and market, between working class and middle class, the social democrats pursued a welfare state that would promote equality of highest standards (the politics of universalism), not only an equality of minimal needs (the politics of residualism) as was pursued elsewhere. His conclusion is that Sweden and the other Scandinavian countries have carried the social citizenship practices further than any other countries. (Esping-Andersen 1990, 27)

Hernes was among the first feminist scholars to argue that the universal social citizenship and membership in a community are gendered constructions. She wrote: "Social democratic hegemony has concentrated its attention almost totally on the citizen as worker. Members of trade unions were until recently the proto-typical social democratic citizens. The social democratic citizen is the *citizen worker*, a male family provider, a working class hero. HIS rights, identities and participation patterns were determined by HIS ties with labour market and by the web of associations as well as corporate structures that had grown up around these ties... Until recently women were mainly *citizen mothers*, protected and supported in this role by a paternalistic state." (Hernes 1987, 140)

On one hand Hernes saw that even the Nordic welfare state model had favoured primarily citizens as male workers, on the other hand she strongly argued that the Nordic welfare states empower women to a greater extent than other political systems do: "I wish to make the claim that Nordic democracies embody a state form that makes it possible to transform them into woman-friendly societies" (Hernes 1987, 15).

According to Hernes the Scandinavian experience gives us a lot of evidence that social solidarity and individual autonomy can be legislated through the idea of universal social citizenship. It has meant that marginalised and other oppressed groups such as women have become a part of the social policy contract. It also has meant that women have succeeded to combine the dual role as mothers and workers. It has been extremely important for women to extend social rights to cover such things as caring of young children and the elderly, sick and disabled members of society. (Hernes 1987, 41).

The notions of woman-friendly social policy and women-friendly citizenship provide an intriguing starting-point for a debate on the meaning of universalism for women. It would be clearly a simplification to argue that universalism has responded mainly to class-related

conflicts and that universal categories and modes of social policy are constructed to serve the welfare of male citizens only.

A number of Nordic feminist scholars have pointed out that universalism has been an important element in bringing into being a woman-friendly welfare society (Anttonen, 1997; Hernes 1987; Leira 1992; Siim 1994). The principle of universalism in the field of income security as well as in social services has benefited women in particular.

One should however try to avoid too simple causal explanations. Pierson and Skocpol have argued that social democracy explains welfare state development mainly after the second world war, before that the political forces behind welfare state development were conservative and liberal rather than social democratic (Pierson 1991, 34-39; Skocpol 1992, 24-26).

Esping-Andersen called one of his regime-types 'social-democratic' since social democracy was clearly the dominant force behind social reform. He however notes that the welfare state as the result was a peculiar fusion of liberalism and socialism satisfying also the needs and demands of the new middle classes (1990, 27). We can also see the association between universalism and 'social democracy' in the post-war Britain. However, as the state started to promote enlarge universalism by extending the initially exclusive social rights for the employed to the rest of the labour force (Mkandawire 2005, 6), and to make compromises with the agrarian population and the middle class the role of social democracy was no more eminent (Baldwin 1990).

In Finland it was the agrarian party that praised the value of universalism when it wanted to expand the access to public social goods, often against the will of social democrats and conservatives. Because of the strength of the agrarian party universalism is more widely spread in Finland than e.g. in Sweden, in the sense that minimum financial benefits (sickness, maternity, child care) are also enjoyed among those outside the labour force. The other side of the coin is that just the largeness of the agrarian population made the post-war social democratic party more interested in earnings-related benefits than in promoting universal social policies (Kuusipalo 1994, 174-176; Anttonen & Sipilä 2000).

Another problem with the connection between social democracy and universalism comes from the fact that in the history of social policy universalism has also been promoted by referring to liberal or conservative principles. To add, welfare state researchers often forget that many conservative and liberal governments have been fond of the universalist principle in education.

There are a number of motivations that have effected on the welfare state development and driven it toward universal solutions. Holtham (1998) has reminded that middle classes benefit most from universal solutions based on tax financing (Rothstein xxxx). Even for middle class citizens it would be economically impossible to buy all the services and benefits for market price. He also says that in today's societies national welfare states are integral psychological

mechanisms through which a sense of community and solidarity are constructed (Holtham 1998). To conclude, there are a number of different reasons behind universalism and one should try to avoid to make too simple connections between for instance social democracy and universalism or feminism and universalism.

Universal benefits

The concept 'universal regime' may be used if a large amount of benefits can be called universal. But what are the criteria for the universality of a benefit? This is the theme of this section. When should a particular benefit (cash or service in kind) be called universal? We think that there are two particular steps in the process of redistribution that must be in accord with the principle of universalism. The first step concerns the inclusion of citizens and the second one the principle of allocation that is used. Universal inclusion means 'membership for all citizens' (Kildal & Kuhnle 2005) so that all citizens are included among potential beneficiaries and no one is excluded. Universal allocation means that the benefit is distributed evenly or that it is delivered to all but it favours those with larger needs. We explain these principles in detail in the following.

Universal inclusion

When reading Beveridge (1942) it is easy to note that the essence for him was to create a social insurance system that would cover all people replacing former specialized organisations and arrangements: 'The plan covers all citizens without upper income limit, but has regard to their different ways of life; it is a plan all-embracing in scope of persons and of needs, but is classified in application.' (Beveridge 1942, 9)

The idea of access for all citizens or residents to a particular benefit is still the criterion for universalism that is least disputed among researchers. We agree that this principle is of paramount importance for the existence of universalism. As there cannot exist no guarantees for access without (national) legislation this means that the universal benefits must be under public regulation.

In the following we clarify the meaning of universal inclusion by presenting alternative principles of redistributing of social benefits, which do not guarantee the inclusion of all people. These alternatives discussed here are residualism, subsidiarity and selectivity.

Before we start looking at these alternatives we have to comment the objection that actually there are no universal benefits because none of them is accessible for all (e.g. Mabbett & Bolderson 199x). Perhaps citizen's wage granted even for babies would be a good example of such a national benefit but it has remained a theoretical and political idea. However, we do not consider the above objection as a relevant criticism because all social benefits until now have only existed in relation to needs and this fact has always been taken into account when

defining universalism. The main criterion for universal access means that all people in need can use the same system (Sainsbury 1996 *pages*) but it does not mean that all people irrespective of their needs can use the system.

Universal benefits cannot be related to the same human needs as social policies in general. Therborn (1995, 97) says that universal rights 'entitle all citizens or residents to social services and income security, specified mainly by their position in the human life-cycle only.' Following Therborn's definition it is easy to see that the list of possible fields where to apply universal principles is the same as in every textbook of social policy: maternity, childhood, education, sickness, disability, old age, and unemployment. Universal social policy system thus much cover what is not covered by other systems. In this sense, universalism in a way completes other systems.

Next we concentrate on the three principles that are not in accord with universalism.

Residualism (or marginalism): We have already told that the main historical aim of introducing universalism in social policies was the desire to weaken the role of residualism. The basic idea of residualism is that social welfare institutions should come into play only when the so called 'normal' structures of supply, the family and the market, break down whereas universalism sees the welfare services as normal, "first line" functions of modern industrial society (Wilensky & Lebeaux 1958, 138). Residual benefits are granted only after individual or familial means testing whereas universal benefits are allocated without the claims to present receipts of income and spending. Although the residual benefits for the poor spring from early human history, there have been good reasons to decrease their importance as presented by Beveridge and Titmuss in chapter dealing the rise of British universalism.

Subsidiarity: The principle of subsidiarity means that social action should always take place at the lowest practical level, which may, of course, be the level of the individual or family. In the event that the lower tiers are not able to cope, the responsibility passes from them to the next tier up. Subsidiarity approaches social needs founding on feelings of solidarity among people, who know each other, and among local communities, often congregations (Spicker 1992, 212-213).

A crude way to describe the difference between universalism and subsidiarity is that in the former the solidarity functions top-down but in the latter down-up. Subsidiarity states a clear preference for private enterprise over public action and as such it makes an antithesis to universalism. Subsidiarity does not guarantee the citizens' equal access to public goods.

In a way subsidiarity comes close to residualism but the difference with residualism, however, is that residual welfare argues for minimal intervention but subsidiarity does not. Where residualism demands non-interference, subsidiarity calls for the decentralisation and devolution of power (Spicker 1992, 216).

Selectivity (restricted membership): The difference between residualism and selectivism is that the residual benefits are targeted for the poor but the selective benefits may be targeted to any particular social groups. Selectivism means that there are typically distinct programs for different class and status groups while universal systems promote equality of status (Esping-Andersen 1990, 23-26). The history of social policy is heavy with distinct programs; there have been e.g. separate pension systems for civil servants, church, sailors, farmers, industrial workers, and employees in short-term jobs. Some of the selective benefits are conditional depending on contributions. There may also be contributions for universal benefits, indeed, but such contributions cannot be the condition of eligibility.

In the late 20th century governments have developed parallel social policy systems that basically serve the same function but the users have to choose and join only one of them. A typical example is the option for Finnish parents to make a choice between the daycare for their children or the child home care allowance. Whatever they choose the government supports their child care expenses. As the two systems are closely related to each other and they together create a kind of totality we have used the concept of 'weak universalism' regarding such arrangements (Anttonen, Kröger & Sipilä 2003).

Universal allocation

As mentioned, a benefit cannot be called universal if it is not allocated in accord with the principle of universalism. It may be easy to agree on a short description of the principle of universalism in regard to the allocation of benefits: "People in the same situation must be treated in the same way." At first glance, the phrase may sound fine but, in fact, it is open to different interpretations. We discuss three of them: 1) only the flat-rate benefits are universal, 2) positive discrimination is not in contradiction with universalism, and 3) compensating the same proportion of lost income for all people is in harmony with the principle of universalism.

Flat-rate benefits: Historically the concept of universalism (or institutionalism as it was called since the late 1950s) was strictly tied to income differences in the class society: the essence of universalism was to treat the members of social classes exactly in the same way. This attitude was most pronounced by Beveridge who spoke both for flat-rate benefits and national minimums that the welfare state should provide to all citizens: flat-rate benefits and basic public services should cover all the basic needs (with some reservations). In addition, special targeting for the poor would be needed, at least temporarily, but provided by the state 'National Assistance' instead of local governments (Beveridge 1942, 141-142).

The immediate problem with the Beveridge program was that the flat-rate benefits were never raised to the level of national minimums in Britain. Thane (279-280) speaks of Beveridgean emphasis on national minimum and flat-rate benefits, which provided adequately for the needs of the 1940s but already in 1954 the number of people receiving

means-tested national assistance payments had increased substantially. Another problem was that the policy of equal distribution was not truly followed in Britain (e.g. in relation to married women, those not willing to work).

Such an experience is not typical to Britain only. Flat-rate benefits have generally been set on such a low level that they have not guaranteed the minimum level of living. Most typically this has happened with the child allowances, which on average have been truly low (Wennemo 1994, 102-105) and with the national pensions (references).

Another problem with the flat-rate universalism is that this principle makes sense regarding cash benefits but it fits inadequately the field of services in kind. Probably nobody expects the citizens to receive exactly the same service: "...the relevant benefit ... is not hospital care itself but rather access to it" (Bergh 2004, 750). Equal distribution of health care is an almost absurd idea and even the primary school, the flagship of universal service, does not provide the same service for all children. Some of the students get special attention and treatment because their needs are different.

If the concept of universalism only meant 'the same for all' it had remained a marginal phenomenon in societies desiring to attenuate the growth of poverty. For instance in the field of pension policies the social democrats both in Britain and in the Nordic countries started to support income-related benefits instead of flat-rate universalism at the latest in the 1960s (with the Danish exception).

Positive discrimination: Positive discrimination means that people with a higher need will receive a better benefit. Some researchers have regarded that positive discrimination does not go together with universalism. For instance Collard (1971) has suggested that in universalism the basis of resource allocation is not income but some other trigger criterion. Universal benefits are allocated irrespective of income; if income is taken into account the benefit is selective. In the same spirit as Pratt (1997, 210-212) recommends that if we describe a system in which the means are tested to favour people with low income we should not speak of universalism but of 'positive discrimination'.

This approach is logical if we decide that all the benefits favouring poor are residual. However, this standpoint involves at least two problems. First, if we call the Poor Law benefits and their humiliating means tests residual there is no need to equalize them with modern national pension systems. Second, Collard's approach does not treat equally those who need service in kind and those who need money. Thus, if financial benefits are allocated according to the need they would not be universal but if services are allocated in the same way, they would be universal. The whole issue of universalism would concentrate on income differences, not on other distinctions.

It is easy to agree with the idea that universalism must always be associated with egalitarianism. Thus, it is impossible to connect the word "universalism" to policies

strengthening inequality. But what about the opposite: should we allow that universal allocation favours the unfortunate “more to those in weaker position but something to all, who need the benefit.”

Titmuss was not orthodox with the flat-rate principle but accepted positive discrimination as a character of universal programs if it happened ‘with the minimum risk of stigma in favour of those whose needs are greatest’ (Titmuss 1976?, 135). For him the point of universalism was not equal distribution, thus, his concept ‘institutional welfare’ was not a principle fixated on the distribution of benefits. This is well reflected in the fact that when he called some benefits ‘institutional’ they did not follow one principle of distribution nor did his ‘industrial-achievement’ system-type??? (source) (see Titmuss 1958, 67-68, 73-74).

Today it seems that many social policy researchers see that granting higher insurance benefits for low-income people is a normal phenomenon that does not violate the principle of universalism. Actually such targeting has been used in countries with universalistic social policies as simply one instrument for making universalism effective; fine-tuning of what are fundamentally universalist policies (Mkandawire 2005, 17). Theda Skocpol (1990) has described this practice as ‘targeting within universalism’.

There is a very important semantic difference between the flat-rate universalism and positive discrimination within universalism. The flat-rate allocation actually means that the *benefits* must be independent of income. The principle of positive discrimination within universalism means that *all people* are included among the users irrespective of their income and that the aim of the programs is full citizenship. The first one means equal treatment of people irrespective of their needs whereas the second one means equal treatment of people including consideration to their needs. Following this art of thinking it is not difficult for us to call national pension systems universal, even if they allocate higher benefits for poor people.

Earnings-related benefits: At first glance it seems impossible to insist that earnings-related cash benefits could be called universal. Most of such benefits are contributory and only those who contribute are included among receivers. In the classic definitions by Wilensky and Lebeaux (1958, 142-143) and Titmuss (197 x) earnings-related benefits belong to the third category of ‘industrial welfare programs’ (Wilensky & Lebeaux) or to the ‘industrial-achievement model’ (Titmuss) which clearly differ from the institutional model. For Wilensky and Lebeaux the question rather is if such benefits belong to the field of social welfare at all.

However, there are several contemporary Scandinavian researchers who tend to think that also earnings-related benefits are universal. Perhaps Esping-Andersen (1990) was the first one who included even earnings-related benefits in the universal model: “... all strata are incorporated under one universal insurance system, yet benefits are graduated according to accustomed earnings” (Esping-Andersen 1990, 29).

His view seems to be that a benefit is universal if it includes all people in principle, although the benefits are earnings-related. Also Sunesson et al. (1998) put earnings-related benefits under the concept of universalism. Bergh (2004) considers that the reduction of the number of people, who are entitled to earnings-related benefits, weakens the universal model. Clayton and Pontusson (1998, 77) appraise that the working population has better access to universalistic social programs than those nonworking. The classic view would be instead that the loss of employment-related benefits cannot weaken universalism.

It is difficult to know why earnings-related benefits have become included in the universal model. Perhaps this has happened because of emphasizing the inclusion instead of the allocation: every employee will become a member of the earnings-related pension system and that is enough to make the benefit universal. Or perhaps earnings-related benefits are seen to be universal in a society in which everybody is assumed to have access to the labour market and the state heavily supports citizens' participation in labour force. Timonen (2003, 144-145) has explained such views in the following way although she decides herself to use the term universal in a narrow sense, referring to flat-rate benefits only:⁴

'Universalism in the Nordic context often refers not only to universal benefits but also to public services and earnings-related benefits that are available to everyone in employment. While earnings-related benefits are in principle the antithesis of universal benefits, they become 'quasi-universal' under conditions of high employment. In the following, unless otherwise specified, the term 'universal' will be used in the narrow sense, in other words only with reference to flat-rate benefits granted to all citizens or residents regardless of past or present employment status.'

Universalism and the drivers of change

As a conclusion we say some words about the state of universalism; what do we think about the survival of universalism in near future. In this assessment we relate universalism to four contemporary drivers of change. We think that the very central drivers are the crisis of global economy, the economic impact of universalism, the political dominance of the middle class and citizens' expectations.

The unparalleled crisis of the **global economy** will have deep consequences for social policies. On the one hand the reform marginal of governments has vanished already; the governments are running on growing debt, and some day the tax payers must pay the bill. Governments will cut costs anywhere they can. On the other hand the governments, because of their ability to borrow enormous amounts of money, have become relatively more powerful actors in the

⁴ Her definition does not prevent her from calling National Insurance systems universal even if they do not grant flat-rate benefits only.

world. The political pressure induced by multinational enterprises, residents with high capital and other incomes, and international economic organizations has weakened. Perhaps even some of the tax paradises will be closed.

The result of all this is that tax rates will grow, and the governments will be reluctant to make any social policy reforms that increase costs. As universal programs are costly and not targeted to the most needy ones, there hardly is any alternative to their retrenchment. Selective programs help to save costs and increase the employment of social workers. The ongoing processes of privatization and informalization (Szebehely xxxx; Sipilä, Anttonen & Kröger 2009) will continue, no doubt.

If we want to see some light in the tunnel, we assume that there will be more political space for democratic decision making and pure national interests. The nation state's comeback in difficult times may feed the spirit of universalism, just as wartime. As unemployment and the risk of social exclusion will increase rapidly there will need for activities that show the spirit of social inclusion. Such developments may influence social policies when the crisis is over.

General **economic considerations** are much more positive towards the universal programs. Although expensive the universal programs improve in many ways the basis of economy. Services for children and youth, especially education, are supposed to be valuable investments in human capital (source) and the universal cash benefits do not impede participation in labour force in the form of 'income traps' as the residual benefits do (source). The administrative efficiency of universal programs is marvelous compared to selective programs and those who need the benefit also receive it (sources; Bergh 2004).

However, there is also a tradition of political-economic criticism against the universalism, particularly in Anglo-Saxon countries. One part of it is the classic criticism against the state that has taken over duties that should have belonged to voluntary organizations and the families (already Alan Wolfe xxxx, later many others) or that would be provided more efficiently by the market organizations. This reproach is directed especially to the social care services.

"I think we've been through a period where too many people have been given to understand that if they have a problem, it's the government's job to cope with it. 'I have a problem, I'll get a grant.' 'I'm homeless, the government must house me.' They're casting their problem on society. And, you know, there is no such thing as society." (Margaret Thatcher, talking to Women's Own magazine, October 31 1987).

Thatcher was not alone much of her criticism is implicit in the third way philosophy: 'We need a new 'contract' between citizen and the state, with rights matched to responsibilities. We will rebuild the welfare state around a work ethic: work for those who can, security for those who cannot' (DSS 1998). Universal systems are seen to enable the participation in

labour force but they did not keep up the work ethic, particularly among youth, and they are not individually specified so that they would activate people to participate. In the spirit of economic moralism there is not much support for universalism.

On the other hand, Nordic countries are good examples of the fact that economic efficiency, work ethic live together with universalism. The economic rationality of universalism will gain more importance when the acute economic crisis is over.

The growth of the **middle class**, partly a success story of the welfare state, has dramatically changed the political constituency. There is no more a mass of low income people who all expect to benefit of financial transfers and public services. The strength of labour unions has attenuated. The majority of citizens do not unconditionally support the welfare state. However, it is not right to suppose that the middle class would not be inclined to endorse universal welfare programs. Middle class needs protection for social risks, social investment on children, and high quality public services. Social rights and efficient programs are an economic way for receiving such outcomes. An middle classed benefit most of welfare state arrangements.

In a society with a reliable and well-functioning public sector the middle class has good arguments to support universalism, as Rothstein has well rationalized. This also is one of the explanations why the US middle class has been careful with suggestions for universal programs. Universalism requires that citizens trust other citizens. The position of middle class may experience profound changes because of the forthcoming environmental crisis. This crisis together with the present economic crises is likely to change social structures. Well-paid industrial jobs may become less compensated by lower paid jobs in the service sector. The mental climate might also change; people would rather expect safety than fast economic growth. Social rights through universal programs could be more important for citizens than today. On the other hand, the future tax increases may paralyze all demands for reforms that would bring new expenses.

During the last decades the apparent contradiction between universalism and diversity has received much attention, particularly by the feminists who have emphasised the masculine character of universalism and the missing sensitiveness of universal programs toward cultural differences. Hillyard and Watson (1996, 323-324), for instance, have argued that universal categories and modes of social policy are masculine and constructed to serve the welfare of male citizens. Williams (1997) has even spoken about 'false' universalism of the post-war welfare state, referring to the fact how social policies have served to consolidate women's place at home, reinforced women's caring responsibilities and their dependence on their male partner (Williams 1997, 13, 27).

Most Scandinavian feminist authors have seen universalism in another light. The idea of universal social citizenship has helped oppressed groups such as women to become a part of the social policy contract. Women have succeeded to combine the dual role as mothers and

workers: the feminisation of labour market participation has been paralleled by the expansion of social services. Conclusively it would be incorrect to argue that women were totally excluded from the sphere of political civil society and the struggles for democratic citizenship (Hernes 1987; Anttonen 1997, 2002).

Another stream of criticism has been connected to the way how universal top-down policies have undermined the importance of human differences and also the potential of citizen's co-operation. Williams (1997) has given good examples about injustices against marginal populations, on the one hand, and the importance of alternative women's services like women's refuges, rape crisis centres, well-women clinics and lesbian lines, on the other hand.

There have been plenty of recommendations on reforming universalism so that universal social rights would remain but also diversity be taken into account in service provision. Obviously diversity is not such a big problem in the field of financial transfers. Fitzpatrick offers the concept of 'differential equality', which is about breaking down the conceptual difference between 'difference' and 'equality' and trying to develop appropriate social, public, economic and political practices so that differential identities can gain a new and powerful voice. (Fitzpatrick 2001, 39)

Williams (1992) suggests that the universality/selectivity debate should be taken onto new ground and selectivity to be replaced by the idea of diversity, which creates the possibility of 'people articulating their own needs' and not simply the structured differentiation of the society at large. 'Perhaps the real challenge resides in the question how can government at local, national and international levels facilitate the universal articulation and provision for diverse welfare needs' (Williams 1992, 209).

'How are we to have welfare provision which is universal in that it meets all people's welfare needs, but also diverse and not uniform, reflecting people's own changing definitions of difference' asks Williams (1992, 209). New Management has been a partial response to this question, because the provision of services has become less universal through the purchaser-provider split and finally vouchers, if in use, have allowed the needy person to choose the provider. The client has got a market relationship with its new problems to compensate for the previous state relationship.

In the Nordic countries the diversity issue has not been so strongly underlined than in Britain, perhaps because universalism as a phenomenon has not been as impressive as the municipalities have had more independent influence on their services.

Universalism is a means to abolish differences among people, not to create them, but also not to reflect them. Universalism is a remedy against posing similar human beings (rich and poor) into different categories but it is not a remedy against putting different human beings into the same category (Anttonen & Sipilä 2000, 184-188). Universalism is a reasonable principle if

people's needs are pretty similar and they deserve to be satisfied (Sipilä 1996). If they are different or there is disagreement about their value, universalism is not the solution.

Conclusion

We have examined five aspects of universalism. Drawing from previous theoretical discourses we have presented universalism as the interest of the state, as policies aiming for economic equality and national integration, as common access to public goods and citizens' right, as a principle for distribution and as a feature characterizing the Nordic welfare regime. The first two aspects have been presented long ago but they have not lost their relevance. Present theoretical discussions largely concern universalism as issues of the access to the social policy programs and the distribution of social benefits. Our main task has been to find the intent of all the discussions and to clarify present discussions.

The main advantages of universalism are the effectiveness of social administration, the unconditional security for people with low income, the promotion of social integration, and the compatibility with economic effectiveness. However, universalism is not a panacea, it does not compensate for all targeted social protection and citizens mutual activities. Universalism has its evident limits and it can only survive together with particularism and selectivism. Residualism is something to be abolished.

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