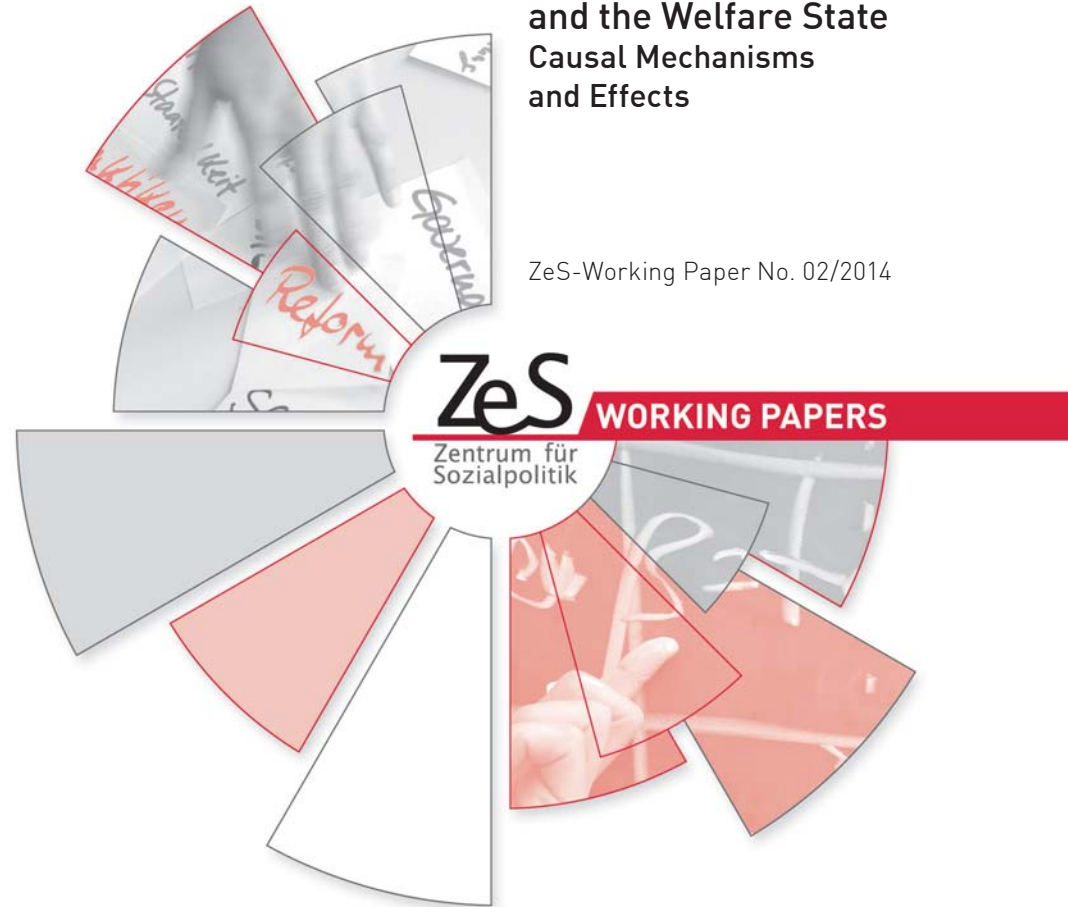


Herbert Obinger  
Klaus Petersen

## Mass Warfare and the Welfare State Causal Mechanisms and Effects

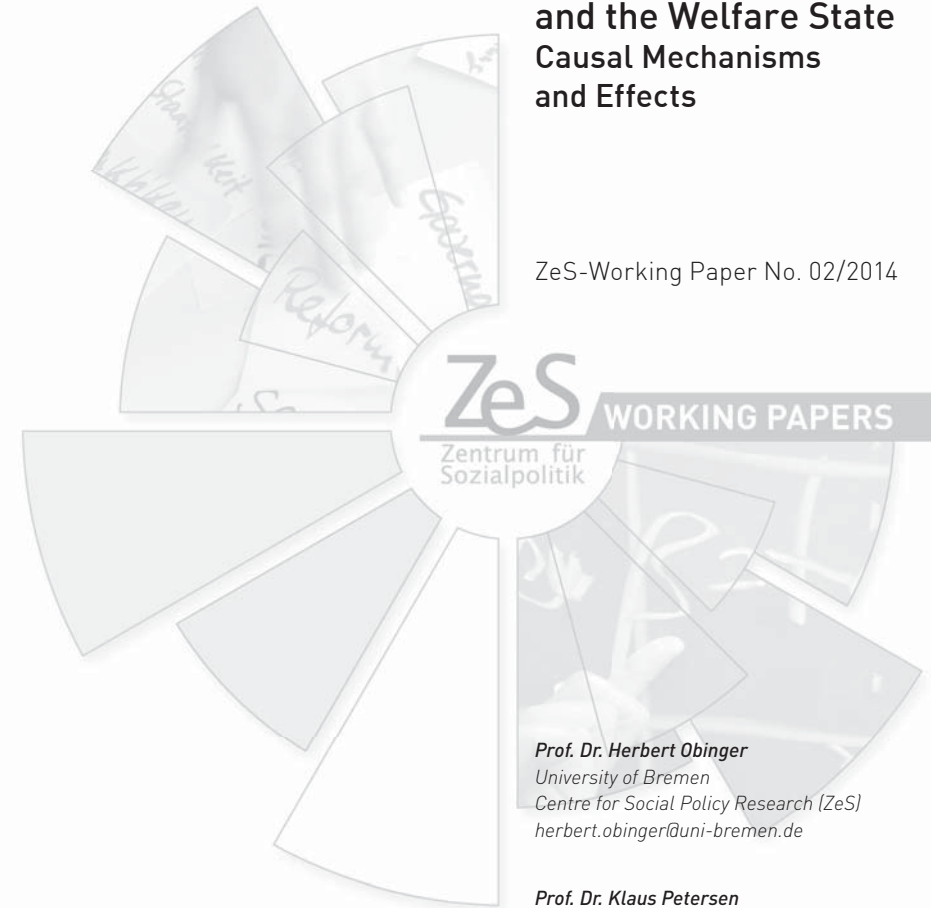
ZeS-Working Paper No. 02/2014



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## SUMMARY

The question whether and how warfare has influenced the development of advanced Western welfare states is contested. So far, scholarly work either focused on the trade-off between military and social spending or on case studies of individual countries. What is missing, however, is a systematic comparative approach that is informed by an explicit consideration of the underlying causal mechanisms. This paper outlines an agenda for a comparative analysis of the warfare-welfare state nexus. By distinguishing between three different phases (war preparation, warfare, and post-war period) it provides a comprehensive analysis of possible causal mechanisms linking war and the welfare state and provides preliminary empirical evidence for war waging, occupied and neutral countries in the age of mass warfare stretching from ca. the 1860s to the 1960s.

## ZUSAMMENFASSUNG

Die Frage, ob und wie Kriege die Entwicklung von westlichen Wohlfahrtsstaaten beeinflusst haben, ist in der Literatur umstritten. Bislang fokussierte die Forschung entweder auf den Zielkonflikt zwischen Sozial- und Militärausgaben oder untersuchte einzelne Länder. Demgegenüber fehlt bislang ein systematischer Vergleich, der auch die relevanten Kausalmechanismen in den Blick nimmt. Dieses Arbeitspapier skizziert eine Forschungsagenda für eine vergleichende Analyse der Wechselbeziehung zwischen Krieg und Sozialstaat. Unter Berücksichtigung von drei Phasen (Kriegsvorbereitung, Konfliktphase und Nachkriegszeit) werden mögliche Kausalmechanismen vorgestellt, wie militärische Konflikte den Sozialstaat im Zeitalter des Massenkriegs (ca. 1860 – 1960) beeinflusst haben. Schließlich werden erste empirische Befunde für kriegsführende, neutrale und okkupierte Länder präsentiert.

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# 1. Introduction

*"Silent leges inter arma"*  
Cicero (52 BC)

The relationship between war and the welfare state is contested. While some scholars consider war as a pacemaker of the welfare state (Titmuss 1950; Wilensky 1975; Preller 1978; Kaufman 1983; Dryzek/Goodin 1986; Dwork 1987, Marwick 1988; Porter 1994; Kasza 1996, 2002; Klausen 1998; Skocpol 1992; Reidegeld 1989; Castles 2010), others emphasize a sharp trade-off between guns and butter and highlight the negative impacts of military conflict on social protection (see Gal 2007 for a recent overview). However, many of these findings are based on case study evidence or only focus on social spending. A systematic comparative analysis of the impacts of war on the patterns and pathways of welfare state development as well as the underlying causal mechanisms is still lacking.<sup>1</sup> A possible reason why comparative welfare state research has not systematically paid attention to war as an explanatory variable of welfare state dynamics is the exceptional nature of the phenomenon itself. War is a rare and anomalous contingency that is conceptualized in the human and social sciences as exogenous shock, 'abnormal event' (Kasza 1996), 'black swan' emergency (Castles 2010) or a 'critical juncture' (cf. Capoccia/Kelemen 2007). All these conceptualizations suggest that

<sup>1</sup> The best writings in this respect are Porter (1994) and Kasza (1996).

conventional theories of comparative public policy rarely apply under circumstances of war and are therefore only to a limited extent suitable for generating meaningful hypotheses on the nexus between war and the welfare state. Even in democracies, special executive emergency powers, censorship, the suspension of democratic rights, public control of the economy and the coalescence of government and opposition are prevalent in wartime, while institutional veto points become less important. Furthermore, wartime decision-making takes place under conditions of high uncertainty and under circumstances in which the military becomes a relevant, if not the dominant actor. In a nutshell, wartime politics follows radically different rules and takes place under markedly different circumstances from that of normal peacetime politics.

This paper argues that war is an important causal factor for explaining cross-national differences in welfare state development and welfare state patterns. Its ambition is to set-up an analytical framework that allows a systematic empirical analysis of the war-welfare state nexus. We therefore offer an exploratory analysis of causal mechanisms linking war and the welfare state and examine the resulting effects on the patterns and developmental dynamics of advanced welfare states. However, four important qualifications are necessary in the forefront of this endeavor.

First, we do not claim that war is the only or even the most important single factor explaining the development of welfare states. The usual suspects in the comparative welfare state literature such as political parties and interest organizations, economic growth, political institutions, and ideas, are all very important explanatory factors. Since we know quite a lot about these factors and the related mechanisms, we focus on war. However, we claim that war had a significant impact on all these determinants. Second, not all kinds of military conflict are related to welfare state development. We argue that modern mass warfare, a phenomenon stretching over the period from ca. 1860 to 1960, is most likely to be connected to the welfare state.<sup>2</sup> Hence this paper naturally has a focus on the two World Wars "[a]s the only full-scale wars ever fought among industrialized powers" (Porter 1994: 150). Third, the impact of large-scale military conflict on social policy is not expected to be similar across countries. Apart from analyzing belligerent countries (aggressors and attacked countries) it is also necessary to shed light on countries which were not directly involved in military hostilities.<sup>3</sup> It is

<sup>2</sup> We acknowledge that also other kinds of wars might have a significant impact on national social policies. The civil wars in the U.S. and Finland (1917-18) marked a defining moment in national history. The same holds for international conflicts such as the Franco-Prussian War or the German-Danish wars in the 19th century.

<sup>3</sup> Prominent examples are Sweden and Switzerland. Even though both countries were neutral during both World Wars, we find that several of the mechanisms discussed are relevant for both cases.

plausible to argue that the impact of war varies with the duration of conflict and is contingent upon whether and to which extent a country's home territory was the arena of military hostilities. T.H. Marshall stated in 1965 that "the experience of total war is [...] bound to have an effect on both the principles of social policy and the methods of social administration. But the nature of this effect will depend to a considerable extent on the fortunes of war – on whether a country is invaded or not, on whether it is victorious or defeated, and on the amount of physical destruction and social disorganization it suffers" (Marshall 1965: 82). It is therefore reasonable to assume that the mechanisms discussed in the following have different effects for aggressors than for attacked or neutral countries with more or less defensive strategies. Superpowers and imperial countries will possibly be quite different in many respects compared to small states. Moreover, democracies and authoritarian states may display different political logics.

Finally, it is not sufficient to focus only on war-related contexts and the decision-making process during wartime. Antecedent conditions and the long-term policy repercussions of wars in the post-conflict period need to be carefully studied as well. Wars are anticipated and planned and cast long shades into peacetime (Boemeke et al. 2006; Hamilton/Herwig 2010). An inquiry into the impacts of war on social policy therefore requires distinguishing between a war preparation phase, the period of conflict itself, and the post-war period. In fact, we demonstrate that the underlying causal mechanisms

differ considerably between these three phases.<sup>4</sup> What they have in common, however, is that they all – and often in an unintended manner – have paved the way for more ‘public’ intervention in social affairs and have crowded-out markets from social provision. In addition, mass war has influenced programme adoption (i.e. the timing of welfare state consolidation) and has boosted social spending in the post-war era. The magnitude of these effects, however, varies with the duration of conflict and is contingent upon whether and to which extent a country’s home territory was the arena of military hostilities. Since the extent of destruction on the home territory is strongly related to the outcome of war, the impact of war on the welfare state is expected to be stronger in the defeated countries. As will be shown for neutral countries, however, war has also affected welfare state development in countries not directly involved in combat.

The paper is organized as follows. The next three sections provide an overview of possible causal mechanisms linking war and the welfare state. Relying on empirical evidence from war-waging and neutral countries each of these sections is divided into sub-sections devoted to a particular precipitating factor. In the fifth section we discuss the effects resulting from industrialized warfare on the patterns and developmental dynamics of advanced welfare states. The final section concludes.

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<sup>4</sup> At the same time it must be clear that the phases are linked and possibly overlapping. For a critical discussion on time in war (including the concept ‘wartime’) see Dudziak (2012), especially chapters 1 and 2, and Marshall (1965). In fact the historical period from 1914 to 1945 covered two world wars and the Great Depression in the 1930s as a series of linked events. It could possibly be argued that for some countries and in relation to some of the mechanisms discussed in this paper this war-crisis-war nexus has to be studied en bloc and not separately.

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## 2. The Phase of War Preparation

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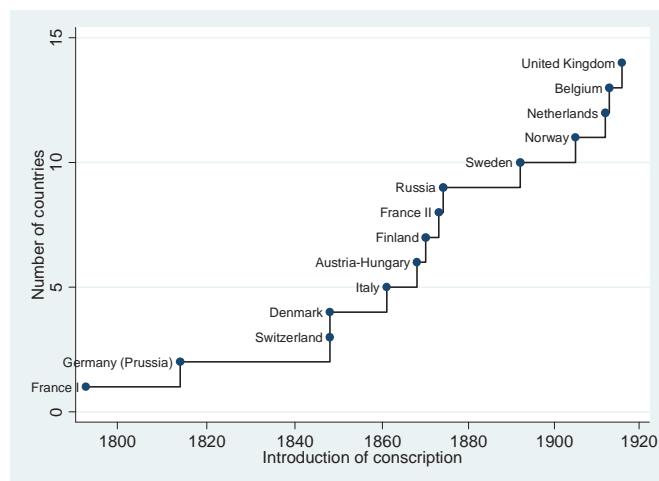
Charles Tilly has famously pointed out that war makes states and states make war (Tilly 1975: 42). However, between the Congress of Berlin in 1878 and the outbreak of the Great War in 1914, Europe escaped large-scaled military conflicts between the great powers (Chickering et al. 2012). In retrospect, however, war was the rule in Europe and given this experience a future war remained a likely scenario. In fact, the rivalries between the great powers steadily increased over these decades and imperialist attitudes fuelled massive war preparation efforts everywhere. A key player in terms of war preparation was the military. However, the longer the previous war receded into history, the greater was the uncertainty among the army commands about the nature of the future war. The major reason for this uncertainty was the rapid progress in military technology from the 1870s onwards. The invention of the machine gun, tanks and submarines, technical improvements in artillery and the building of huge battleships and modern aircrafts have dramatically increased the fire power of weapons and fundamentally changed the nature and conduct of war as demonstrated for the first time by the U.S. Civil War (Chickering et al. 2012). The precise consequences of industrialized warfare, however, were widely unknown. The only thing taken for granted was that an upcoming violent conflict would be waged as a mass war with unprecedented destructive consequences. The two world wars confirmed the truth of this image of a total war (with World

War II being even more high-tech), and the inter-war period can be considered for some countries as one long phase of war preparation.

The emergence of mass war is closely related to the spread of the mass conscript army during the second half of the 19th century (cf. *Figure 1*). The emergence of universal conscription in continental Europe was mainly the result of military setbacks and military competition (Posen 1993). Prussia was the first country that emulated the French people’s army by introducing universal male conscription in 1814. Military defeats against Prussia motivated Austria-Hungary (1868) and France (1873) to (re-)introduce general conscription, while the defeat in the Crimean War had a similar effect for Russia. In Scandinavia, Denmark had introduced universal conscription in the democratic constitution of 1848 as part of a national mobilization against Prussia, and Finland (1870), Sweden (gradually in the 1880s) and Norway (1905) followed in the coming decades. The United Kingdom only introduced universal conscription during the Great War in 1916.

Mass conscription was an important element in the construction of national citizenship and nation building (Frevert 2004) and had at least three effects for the welfare state in a broad sense.

Figure 1: Introduction of conscription in European countries until 1918



## MASS CONSCRIPTION AND PUBLIC HEALTH

The introduction of mass conscription generated a close nexus between the health status of the (male) population, high infant mortality and military power. Given the poor health status of young men and children caused by the repercussions of industrialization, urbanization and rampant diseases such as tuberculosis, concerns about force levels and combat power increased both among politicians and the military<sup>5</sup> and triggered, in consequence, social reforms with special emphasis on the social protection of (future) soldiers

<sup>5</sup> However, the military also opposed social reforms. Some military leaders in Imperial Germany and Austria-Hungary believed that social policy promoted effeminacy and degeneracy (cf. Zimmermann 1915: 8-9).

and mothers (Skocpol 1992). Arguably the first historical instance is a report by Prussian Lieutenant General Heinrich Wilhelm v. Horn to King Frederik William III in 1828 in which he complained about the declining number of soldiers in the Rhineland due to widespread child labour in the textile industry (Potthoff 1915: 6). This report prompted the first Labour Protection Act in Germany, the so-called *Preussisches Regulativ* of 1839, which stipulated a ban of child labour for children under nine years of age, banned Sunday as well as night-work for juveniles and restricted working-time for adolescents.

In the second half of the 19th century, improvements in recruitment statistics provided reliable information on the health status of large parts of the population (Zweiniger-Bargielowska 2010; Hart-

mann 2011). A common problem was that many of the medically examined young men did not qualify for military service. For example, in Austria-Hungary seventy per cent of the recruits did not pass the draft physical in 1912 (Schmidl 2003: 149 fn15; Tálos 1981: 24-5). The share of young men who were deemed unfit for military service amounted to 54 per cent in the early days of the German Empire and 51 per cent in Switzerland in 1878 (Cohn 1879: 518 fn1). Also war itself revealed physical problems among soldiers. In Britain, a country lacking conscription until 1916, contemporary observers attributed the poor British military performance in the Boer Wars to the “social degeneration of officers and soldiers, due to urbanization and industrialization in the British motherland” (Leonhard 2007: 290). Nearly half of the recruits that had been mustered in industrial cities such as York, Leeds, and Sheffield between 1897 and 1901 failed the medical examination and were deemed unfit. These were shocking revelations which raised concerns among high-rank militaries about ‘national degeneration’ and eventually led to social policy reforms (Dwork 1987: 15-21). These reforms focused on public health with special emphasis devoted to children and juveniles with a view “that the new generation of children, tomorrow’s Imperial Army, was properly nourished” (Fraser 1973: 137). During the Great War Prime Minister Lloyd George complained about the poor physical status of British soldiers compared to Australians and Canadians. In fact, a report by the National Service Department estimated that more than one million men

were lost for combat through the neglect of public health. “You can not maintain an A-1 empire with a C-3 population”, Lloyd George said in a speech in Manchester in 1917 and announced several social policy reforms for building a better Britain in the post-war years (Gilbert 1970: 15, 19). In Switzerland, Joachim Heer, the main architect of the very progressive Swiss Federal Factory Act of 1877, defended the bill by arguing that the ban on child work as well as the prohibition of night and Sunday work for women and children are important vehicles for securing defense capability and military strength (Rutishauser 1935: 112, 123).

The share of unserviceable men remained high until the outbreak of World War II. In the U.S., almost fifty per cent of the mustered industrial workers were unfit for military service (Sparrow 2011: 205), while forty per cent of young men failed the draft physical in Japan in 1935. As a consequence, high-rank military officers and the Japanese Army Ministry proposed the creation of a ministry of health. In fact, already in 1937 a Welfare Ministry was established and a new national health insurance bill was adopted one year thereafter (Kasza 2002: 423-24).

## MASS CONSCRIPTION AND EDUCATION

Secondly, there is evidence that the army literally became a ‘school of the nation’ and that warfare is an important factor behind the emergence of mass schooling. A recent comparative econometric study has found strong evidence that advances

in primary education are positively associated with military rivalry or prior war involvement (Aghion et al. 2012). The military had a keen interest in skill formation and primary education for several reasons. Apart from the fact that information and communication are of particular military importance, technological progress required growing skills for operating and maintaining an increasingly sophisticated, dangerous and costly equipment (Duffy 1985). Reading literacy was a prerequisite for understanding written orders, technical manuals and the usage of new technologies such as the telegraph. A contemporary witness of the Great War noted: "It is not only the average physical power and health of the individual conscripts that matters. The more technically advanced our military and weaponry is becoming, the more mental activity, readiness of mind, comprehension and the expertness in technical affairs also matter" (Zimmermann 1915: 22). However, illiteracy or poor literacy skills were common problems in many countries and raised military concerns from the very outset. Hence (basic) education and training programmes were also offered by the army itself. In Tsarist Russia, military reformers such as War Minister and former army general D. A. Miljutin clearly recognized the importance of education for the military and therefore launched comprehensive alphabetization programmes to roll-back illiteracy among peasants (Katzer 2003: 57; Benecke 2007: 248, 251). Illiteracy was also a widespread phenomenon in the United States. Thirty per cent of the 1.7 million men taking the Army Beta test in 1918 could not properly read the forms

due to poor literacy and this experience gave rise to a broad range of training and education programmes operated by the army (Duffy 1985). Language skills were equally important for maintaining an effective military, notably in multi-national armies. In the Austro-Hungarian army, for example, the language of command and working language in the common army was German and every soldier had to learn at least a minimum number of German commands. However, different languages were spoken at the level of the regiments<sup>6</sup>, Italian was the dominant language in the navy, while Hungarian was the command language in the Honvéd. Overall, ten languages were spoken in the armed forces.

Moreover, the military also had an interest in education for reasons of propaganda and indoctrination. Mass warfare not only required the mobilization of the energy and the readiness for self-sacrifice of millions of soldiers, but mass literacy also made "soldiers more accessible to propaganda, both as children and as adults" (Posen 1993: 121). Primary education was considered as important vehicle for promoting patriotism, a common national language<sup>7</sup> or national unity, and there is considerable evidence for Prussia, France and Austria-Hungary that the military tried to manipulate primary edu-

<sup>6</sup> In 1903, only 18 out of 102 infantry regiments were monolingual. In order to cope with language diversity, commissioned and non-commissioned officers had to learn the regiment language(s) in so-called *Bildungsschulen* (Hämmerle 2007: 232-233).

<sup>7</sup> In 1863, 7.5 million French could not speak French properly but only local dialects (Aghion et al. 2012: 7).

cation before and during wars (Führ 1968; Posen 1993). In Switzerland, the examination of skills in reading, mathematics and writing was part of the army's initial testing of recruits (Hartmann 2011).

## MASS WARFARE AND POPULATION POLICY

The emergence of mass mobilization warfare made population policy a focus for policy-makers and the military. High infant mortality was an impediment to rapid population growth and raised military misgivings. In the early 20th century, all European powers experienced declining fertility rates (Kahn 1930; Myrdal/Myrdal 1935) and it was population size (and quality) relative to the rival nations that raised political and military concerns. The equation that characterized public debates was simple: Higher birth rates and population figures are equivalent to greater military power. In France, the fear of being outnumbered by the German arch enemy (but also by Italy) caused intense debates in the late 19th century about the nexus between population decline, defense capability and the survival of the nation (Hartmann 2011: 41-48). This debate triggered pronatalist policies (for example tax deductions for families, housing policies, public health) and accelerated the introduction of family allowances. Even though similar responses can be found to varying degrees in most European countries (Bock/Thane 1991; Koven/Michel 1993), the commitment to population-oriented family policies was most pronounced in fascist Italy and Nazi

Germany. Mussolini dreamed of the recurrence of the Roman Empire and launched pronatalist policies for realizing his power ambitions (Forruchi 2010). The Nazis considered declining fertility rates as an immediate threat to the people (*Volkstod*) and its defense capabilities (Reidegeld 1989; 1993). It is thus hardly surprising that both regimes enacted several social policy and tax measures with a view to increasing population figures and providing the military with a sufficient number of soldiers (Forucci 2010; Aly 2005). But even in Social Democratic Scandinavia we find similar population policies in the interwar years. The most prominent example is Sweden where Gunnar and Alva Myrdal's analysis of the "Crisis in the Population Question" (1935) hi-jacked a traditional conservative issue based on concerns for the military survival of the nation and turned it into a Social Democratic reform agenda (Hatje 1974).



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### 3. The War Phase

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War itself had enormous but very different impacts on the countries involved. For neutral countries like Switzerland and Sweden these effects were more indirect as they were to a much larger degree able to pursue business as usual. This was even the case in Denmark during the Second World War, whereas other occupied countries like Poland and the Netherlands witnessed a more brutal occupation accompanied by regime changes. Some countries were heavily involved in combat and suffered from enormous casualties whereas others did not. Moreover, countries also differed in terms of politics as some were autocratic when they entered the war, while others were democratically controlled. For the latter warfare seems to have fostered a national consensus and provided governments with more decision making powers (e.g. emergency measures). However, to which degree this has overdetermined traditional party conflicts over social policy is still an open question (Addison 1994; Jefferys 1991). In any case, there are at least five effects for the welfare state understood in a broad sense.

#### SOCIAL POLICY AND MASS LOYALTY

Both World Wars were waged as mass wars. Millions of war victims, an economy of scarcity, higher tax burdens, repression, inflation, famine, longer working time and work duty connected to labour shortages are possible causes of domestic

turmoil and social unrest. However, political stability at home was a necessary prerequisite for achieving war objectives and the military, therefore, had a massive interest in containing all kinds of political unrest on the homefront. Since domestic political stability was a prerequisite for succeeding in war, governments of all kinds were reliant on achieving mass compliance for the official war aims amongst their populations. In addition to repression and propaganda, strategies aimed at increasing output legitimacy may help to secure mass loyalty and the preparedness for self-sacrifice. Social policy is a classic instrument in this respect. However, the need to become a benevolent warfare state is likely to be constrained by the sheer size of the military budget during wartime. In fact, social spending stagnated or declined in many countries for which data is available (Flora et al. 1983), while military spending skyrocketed. While these figures indicate a sharp trade-off between guns and butter in wartime, there is also evidence that governments of all kinds used social policy to enhance political support. During the First World War, the autocratic Central Powers were domestically challenged by a growing but disenfranchised labour movement with a considerable organizational power and thus a high strike capability. The so-called political truce policy initiated by German Chancellor Bethmann Hollweg was an attempt to gain labour's approval for the war and to mitigate class conflict by promising forms of social compensa-

tion. In the beginning, however, national war enthusiasm, which was also shared by the left, eased domestic conflicts. As the war progressed, however, the death toll as well as shortages of food, labour and commodities increased. Against this backdrop, strikes, social unrest and food riots increased in the late war period. While the military often opted to take a hard line, the governments were aware of the fact that at least some concessions were necessary, because – in the words of Chancellor Bethmann Hollweg – “we cannot win the war against the working class” (Mai 1997: 98). The major concession was the recognition of labour representatives as partners in industrial relations in the late war period. Labour shortage in the arms industry led to the Auxiliary Service Bill (*Gesetz über den Vaterländischen Hilfsdienst*) in 1916 that obliged men aged from seventeen to sixty to work in the arms industry. This militarization of labour, however, was compensated by some welfare benefits and labour representatives were incorporated into arbitration boards and gained influence at the firm level, e.g. through the establishment of Workers' Committees in big enterprises. For the first time, unions were accepted as partners in industrial relations.

The situation was similar in Austria-Hungary, even though the regime relied on repressive measures from an earlier date. The War Service Act of 1912 (*Kriegsleistungsgesetz*) and several related decrees passed after the outbreak of war restricted the right of association, extended working time, constrained labour mobility and deregulated labour protection (Stolper 1915: 101ff; Tálós 1981: 117-121). In ad-

dition, male civilians up to the age of fifty (55 from 1916 onwards) were obliged to deliver personal services for the war economy. Similarly in Germany strike activity and protests for the eight hour working day and other social rights increased significantly in the late war period. The government responded with selective social concessions including a law that improved the protection of tenants (1917/18), some improvement in health insurance and, most importantly, the establishment of grievance commissions related to wage issues and working conditions (1917). Based on the latter decree, unions were for the first time recognized as legitimate representatives of workers' interests (Tálós 1981: 121). This shift in the nature of industrial relations was arguably one of the most important effects of the war for the welfare state in the authoritarian Central Powers.

But even a totalitarian regime such as Nazi Germany was reliant on mass loyalty during wartime. Not only the charismatic leadership of Adolf Hitler but, as shown by the historian Götz Aly, social benefits also played an important role in this respect: “Continuous bribery in social affairs formed the basis for the internal cohesion in Hitler's *Volksstaat*” (Aly 2005: 89). Aly portrays the Nazi regime as a “socio-political dictatorship of complaisance” aimed at improving the living standard and social security of the *Volksgemeinschaft*. In addition to improved social protection of soldiers and their families (Aly 2005: 87-89), the expropriation of Jews and massive armed robbery in the occupied territories provided resources for redistribution, while labour shortage

was resolved by the brutal exploitation of forced labourers.

Not only autocracies in all their nasty variants but also belligerent democracies were in need of political support during wartime. What we can observe there in a situation of a pronounced guns butter trade-off is the 'promise' of a better, more peaceful and socially just post-war order. Lloyd George's promise of a better Britain after the Great War, which included a public housing programmes and public health reforms, is a case in point. During the Second World War the war cabinets of Canada, the U.S. and Great Britain, either drafted or announced plans to overhaul social security schemes in the post-war period (Young 1981; Addison 1994).

In January 1941, President Roosevelt enunciated in his annual speech to Congress four freedoms (freedom of speech, want, worship, and fear) for which the war would be fought. This speech not only laid the groundwork for the American involvement in the war but also for the Atlantic Charter adopted some months later (Sparrow 2011: 43-45). Almost exactly three years later, President Roosevelt called in a State of the Union Address for an 'Economic Bill of Rights'. By referring to his 'four freedoms speech' of 1941, he argued that, in light of the growth of the nation and the expansion of the industrial economy, mere "political rights proved inadequate to assure us equality in the pursuit of happiness" and have therefore to be amended by social rights. He suggested a comprehensive list of social rights, including the right of every family to a decent home; the right to adequate medical care and the opportunity to achieve and enjoy

good health; the right to adequate protection from the economic fears of old age, sickness, accident, and unemployment, and the right to a good education. "All of these rights", he continued, "spell security. And after this war is won we must be prepared to move forward, in the implementation of these rights, to new goals of human happiness and well-being" (all quotes from Rosenman 1950: 40-42).

Arguably the most famous plan aiming at restructuring social security in the post-war era is the British Beveridge Report issued in November 1942. The report found great attention abroad and fuelled, to some extent, social regime competition between the belligerent nations. Already in April 1943, the Nazi Ministry of Labour published a translation of the Beveridge Report for internal use only. In the document's preface even the Nazis classified the report as a "political offspring" of the Atlantic Charter. However, they jeered that the report "unintentionally provides a comprehensive picture of England's numerous shortcomings in the field of social affairs" (Reichsarbeitsministerium 1943: iii, vi). Motivated by early military success and under the auspices of the head of the German Labour Front, Robert Ley, the Nazis themselves drafted ambitious plans to overhaul the social security system in the post-war period (Smelser 1990). In an effort to generate mass loyalty, the Nazi propaganda promised the "biggest welfare state in the world" after the end of war (Reidegeld 1989: 512-3). In contrast to the overhaul of the British welfare state envisaged in the Beveridge Report, a postwar Nazi *Sozialstaat* luckily never came to fruition.

Other democracies such as Australia, which to a lesser extent were affected by war, already introduced new and comprehensive social programmes in wartime. Among the programmes adopted by the Labour government and its conservative predecessor were widows' pensions, unemployment compensation, a funeral benefit and a child endowment scheme (Castles/Uhr 2005). Canada introduced federal unemployment compensation in 1940, after several previous attempts had failed as a consequence of provincial resistance and court decisions. The amendment of the British North America Act required for federal policy jurisdiction attracted surprisingly little dissent under war-time conditions (Banting 1987). In both federations, the Second World War was an occurrence that increased the powers of federal government in social and fiscal affairs. In neutral Sweden government commissions continued to work during the Second World War preparing reforms introduced in the years immediately after the war (Åmark 2000). Moreover, in 1939, Sweden introduced a special allowance for families of mobilized soldiers in order to secure material living standards (Abukhanfusa 1975).

## CENTRALIZATION, ECONOMIC PLANNING AND INSTITUTION-BUILDING

War-induced economic isolation and/or destruction typically led to shortages of foodstuffs, commodities, labour and raw materials and caused, in consequence,

inflation and, in many cases, output decline.<sup>8</sup> Governments everywhere responded to economic scarcity with a broad set of regulatory policies including price and rent controls, wage regulation, rationing, currency controls and the nationalizations of enterprises in strategically important sectors (Porter 1994). In a nutshell, the free market was increasingly replaced by economic planning and gave rise to a dramatic expansion of government, enhanced executive powers of government and changed state-business relations. These effects are well-documented by numerous studies (Friberg 1973; Pinder 1981; Schaeffer 1991; Porter 1994; Klausen 1998; Eisner 2000; Sparrow 2011). Already contemporary analysts of the war economy such as Austrian economist Gustav Stolper predicted in 1915 a dramatic and long-lasting rise of big government, i.e. a phenomenon that after the Second World War, i.e. *ex post*, became known as displacement effect (see below). In the early months of the Great War, Stolper noted clear-sightedly: "The most important shifts [caused by war] will affect the relations between the market economy and the state economy. War has extended the scope of state influence to a degree that, arguably, never will return to its previous level. The heavy interference of the state into the right of self-determination of its citizens, the comprehensive regulation of production and consumption, not only for the purpose of war conduct but also for the sake of general social purposes, create a precedent whose repercussions can hardly be eliminated in peacetime" (Stolper 1915: 5).

<sup>8</sup> The U.S. is a notable exception.

Indeed, the war-induced transition to a command economy significantly changed state-society relations and required new bureaucratic capacities that often were established at the central state level. Social policy is no exception as war led to several institutional innovations: Britain established a Ministry of Labour (1916), a Ministry of Reconstruction (1917) and a Ministry of Health (1919), while a Ministry of Education was set up in 1944. Austria created the first Ministry of Social Affairs in the world in 1917, Sweden and Denmark followed in 1920 in the aftermath of World War I, and even neutral Switzerland established a War Welfare Office during the Second World War (Eidgenössische Zentralstelle für Kriegswirtschaft 1945). The establishment of the Japanese Welfare Ministry in the early days of the Pacific War has already been mentioned.

## THE MILITARY BURDEN AND THE RISE OF THE TAX STATE

The need to finance the war was a further step on the road to big government. Military budgets skyrocketed in wartime. In consequence, the tax powers of the central state were everywhere enhanced. New taxes such as income taxes (e.g. France 1915, Canada 1917) and war-profit taxes were introduced during wartime. In the U.S., a country where tax increases are notoriously difficult to achieve, the Second World War led to a fiscal revolution (Sparrow 2011: 121-25, 263). Even in neutral Switzerland, the government introduced an extraordinary property tax, a sales tax and a progressive income tax

in April 1940 in response to the military threat by Nazi Germany. Special cases in this respect are occupied countries that typically were forced to contribute to the economy of the occupation power through simple plundering of values and resources or unfavorable trade agreements (Lemkin 1944). A good example is Denmark where the German occupation was paid from an account in the Danish National Bank (Hansen 2002).

Mass warfare and mass conscription also increased political demands for progressive taxation. Scheve and Stasavage (2010) have shown that the high opportunity costs of war participation borne by millions of individuals generated political pressure to levy financial burdens on those who did not risk their lives or sacrifice time and income during military service.<sup>9</sup> Hence it was the 'logic of equal sacrifice' that led to higher tax burdens for the rich. During World War I, the top marginal rate of income tax rose from 7 to 77 per cent in the U.S., from 8.3 to 60 per cent (1920) in the United Kingdom, from 21.9 to 72.5 per cent (1920) in Canada, and from 2 to 50 per cent in 1919 in France (Scheve/Stasavage 2010: 538-41). During the Second World War, the effective tax rate of the federal income tax even went up to 90 per cent in the U.S. for those earning more than one million dollars (Sparrow 2011: 125). Even in neu-

<sup>9</sup> For the same reason some countries such as Switzerland (1878), Austria (1880) and some German states until 1871 have introduced under various labels a tax levied on those men who did not serve in the army. Nazi Germany introduced such a tax in 1937. The Swiss *Wehrpflichtersatzabgabe* (Cohn 1879) is still valid today.

tral Sweden the marginal rate of income tax jumped from 18.7 percent in 1939 to 24 per cent the year after due to a special defense tax rise (Rietz et al. 2013). There is also cross-national evidence that wars of mass mobilization have fuelled inheritance taxation (Scheve/Stasavage 2012). Again, the imperative of a fair sharing of the war burden increased pressure for taxation of major fortunes. Governments also financed the war by borrowing. However, derailing public debt either was translated into hyperinflation once governments began printing money or debt redemption kept tax levels high in the aftermath of war. Hyperinflation, in particular, might have a long-lasting impact on the public-private mix of the post-war welfare state as it made private fortunes or fully funded forms of social provision worthless and, in consequence, increased demand for public income support. War therefore might have discredited the trust in the market, notably in those countries suffering from severe destruction and hyperinflation. The U.S. and Switzerland are counter-examples. This is perhaps related to the fact that both countries neither suffered from acts of war on their home territory nor were they affected by hyperinflation.<sup>10</sup> By contrast, private forms of provision were strongly crowded out in the most war-torn countries of continental Europe in the decades following the Second World War.

<sup>10</sup> However, Sweden is an exception to this pattern as the war led to more public regulation and the public-private mix changed in favour of public solutions (Frieborg 1973).

## SOCIAL POLICY DIFFUSION AND POLICY TRANSFER THROUGH WAR

War also affected and restructured existing patterns of social policy diffusion and gave rise to coercive policy transfer. Firstly, this most radically took place through occupation and border revisions. In the aftermath of World War I the map of Europe changed dramatically as new countries emerged and the defeated powers lost territory. This meant that citizens had to be transferred from one social security system to another as it was the case in Denmark when the country reunified with the northern part of Slesvig -Holstein after a referendum in 1920. The process was complicated as the Germans remained financially responsible for war invalids that had served in the German army (Schultz 2002). During World War II Germany occupied large parts of Europe and this affected the existing social security systems in the occupied territories in several ways. However, the Nazis employed different techniques of occupation (Lemkin 1944). While German legislation was comprehensively imposed on countries such as Austria and Luxembourg, other countries such as Belgium, the Netherlands, France and Norway were forced to a close co-operation. In still other countries like Denmark, the domestic political institutions remained basically intact during German occupation. As a result, the effects of German occupation varied across these groups of countries. In the first group, the imposition of German legislation had, in parts, more direct and long-lasting ef-

fects. Even though the old national social security legislation was re-established after the war, some elements of German social security legislation remained in a revised manner in place. Austria is a case in point as pension insurance for blue-collar workers, which did not exist before the *Anschluss*, was adopted by Austrian social security legislation. Within the second group, governments tried to preempt a more direct Nazi influence by adjusting their welfare systems accordingly. For example, the Quisling government in Norway, with inspiration from Nazi Germany, developed plans for social policy reforms and implemented changes in unemployment insurance and labour market regulation (Seip 1994: 139-143). In the third group, where the local administrations continued to function during German occupation, there was even resistance against a Germanification of social security systems. In Denmark the Ministry of Social Affairs in 1941 launched, in an effort to defend the existing welfare state, a propaganda offensive that included the translation of a more than 400 pages book on the Danish social security system into German (Danish Ministry of Social Affairs 1941) and the making of a film on the same topic for a German audience. What all these countries have in common, however, is a drastic deterioration of national social standards in the wake of military occupation (Lemkin 1944: 67ff ). Moreover, there was a brutal exploitation and deportation of the able-bodied labour force with a view to supplying the Nazi war machinery.

Secondly, we find examples of war-related social policy diffusion beyond the German occupied territories. The Beveridge Plan (1942) not only contributed to secure the legitimacy of the British government and its war effort but also immediately became a key reference for social policy debates in other countries offering both practical solutions and a symbolic alternative to German warfare regime. A special case of policy diffusion is related to the exile governments of occupied countries that were based in London. This gave impetus for new kinds of very direct policy diffusion by establishing a transnational arena for post-war planning (Goddeeris 2007).

## DEMobilISATION

*"It's sometimes more complicated to climb down than to climb up a tree"* <sup>11</sup>

Towards the end of both World Wars, military demobilization in war-waging countries further boosted economic and political planning as well as the introduction of categorical social and education programmes. Military demobilization required significant administrative capacities since millions of soldiers and refugees needed to be reintegrated into society and the labour market. The most pressing social challenges related to demobilization

were unemployment, income support to disabled veterans and their families, education and vocational rehabilitation of veterans, and housing. Whereas, prior to World War I, housing was basically left to markets, governments intervened for the first time on a larger scale in this area after the Great War, either by means of public housing programmes or loan subsidies. Given a shortage of about 600.000 houses in Britain, Lloyd George proposed a large-scale public housing programme to provide "homes fit for heroes" and to bring "light and beauty into the lives of the people" (Gilbert 1970: 19; Fraser 1973: 167). Another example is the Australian war service loan scheme introduced in 1919 which offered cheap loans to veterans of both world wars. A striking number of 265.000 homes were built under this scheme between 1945 and 1975 (Castles 2010: 95). Demobilization also fuelled the introduction of welfare benefits and education programmes for (disabled) veterans (Gerber 2001). A major example is the G.I. Bill in the United States adopted in 1944. As "one of the most generous and inclusive social entitlements the federal government has ever funded and administered", the programme offered social benefits, higher education and vocational training to the 7.8 million veterans of the Second World War (Mettler 2002: 351). Arguably the most severe problem connected to demobilization was unemployment. While labour shortage and full employment characterized the war period, the return of millions of soldiers and the prospective lay-offs in the munitions industry at the termination of war were

huge challenges for all governments. The fear of social unrest and revolutionary activities of those who risked their lives for the nation motivated many governments to adopt emergency benefits for returning veterans. With exception of Britain, however, no country had introduced a mandatory unemployment insurance before 1914 and even the British scheme was very limited in terms of coverage and the benefits offered. In an effort to contain working-class discontent, the British government introduced, as part of its plans for demobilization, a temporary and non-contributory out-of-work donation for discharged servicemen that was amended and extended by a civilian out-of-work donation. In consequence, unemployment protection became universal and was granted as a social right immediately at the end of war (Gilbert 1970: 54ff ). The British example was not a singular case, however. Several other warring countries such as Austria and Germany extended income support for the unemployed connected to demobilization.

<sup>11</sup> Speech delivered by German Minister of Defence, Thomas de Maizière, to the German Bundestag on December 15, 2011 addressing Germany's ISAF involvement in Afghanistan, see Bundesregierung Bulletin Nr. 136-2, 15/12/2011.

## 4. Post-War Period

The immediate post-war periods were almost everywhere characterized by comprehensive social policy legislation and led, especially after 1945, to a quantum leap in welfare state development. This might be related to mass warfare in several ways.

### WAR-INDUCED SOCIAL NEEDS

In the wake of both world wars over sixty million people lost their lives and total war generated social needs of inconceivable magnitude. The social protection of millions of widows, orphans, disabled veterans, unemployed, refugees and homeless people generated a gigantic challenge for policy-makers. All these disastrous outcomes of war created a strong demand for income support provided by government and had a tremendous impact on social expenditure.

### POLITICAL MACRO-CONTEXT: THE RISE OF DEMOCRACY AND INTERNATIONAL SOCIAL POLICY CO-OPERATION

Mass warfare and the modern mass army seem to have decisively shaped the political and socio-economic context that facilitated the formation and expansion of the modern welfare state. Both World Wars ended up in immense destruction, human suffering, economic decline and, in some

places, the collapse of regimes and empires. The break-down of multi-national empires after the Great War and racial mania during World War II ended up in an unusually high degree of ethnic homogeneity in European nation states. This catastrophic impact of war on the social structure might be related to the welfare state in a particularly perverse manner as some scholars have argued that this kind of societal homogeneity is a precondition for solidarity and redistribution to flourish (Alesina/Glaeser 2004).

However, war also meant the breakthrough of democracy. Universal suffrage was a long-standing demand of the labour movement in many countries but it was eventually total war that decided this struggle. Given the blood toll of millions of soldiers, mainly recruited from the lower strata of society, and the large-scale mobilization of the female labour force in wartime it was no longer possible for governments to deny political participation after the end of war: "Mass military service and mass carnage had created a democratic imperative" (Porter 1994: 172-73). In fact, both World Wars meant a quantum leap in terms of the extension of male suffrage and/or the introduction of women's suffrage (Porter 1994; Kasza 1996: 359; Przeworski 2009; Hicks 2013). Moreover, the Great War was a catalyst for the introduction of proportional representation<sup>12</sup>, with important implications for

<sup>12</sup> Examples are Austria (1918), Denmark (1915), Germany (1918), Italy (1919), Netherlands (1918), Norway (1919) and Switzerland (1919).

government spending and redistribution (Iversen/Soskice 2006). As a result, all the tremendous war-induced social needs were politically addressed to democratic governments after both wars, at least in the group of countries which later became the founding members of the OECD. Political competition, the participation of lower income groups and the involvement of unions in politics, and the changes in individual and collective preferences discussed in the next subsection translated the war-driven sudden shift in public intervention in social and economic affairs into a stable, long-term trajectory of continuous welfare state expansion.

Moreover, both world wars were also catalysts for the intergovernmental co-operation in social and economic policy. Carnage, destruction and social turmoil created both a necessity and a window of opportunity for establishing international collaboration in social and economic affairs. The foundation of the International Labour Organization (ILO) in 1919 (as part of the Treaty of Versailles) was clearly triggered by "war and revolution" (Rodgers et al. 2009: 2). Designed as a tripartite organization the ILO promoted co-operation between governments, employers and unions and contributed in subsequent years to the spread of social security legislation in member states. The efforts to promote international co-operation for the sake of common welfare and economic well-being intensified again during and after the Second World War. An important step toward the new post-war order was the Atlantic Charter which made the welfare state a sort of official war aim of the allied powers (Nullmeier/Kaufmann

2010). Together with the ILO Declaration of Philadelphia (1944) the Atlantic Charter became a constituent element of the UN Declaration of Human Rights. In Europe war experience was an important impetus for the restructuring of Western Europe from the Coal and Steel Union over the Treaty of Rome to the EU (Urwin 1989). Finally, the Bretton Woods Conference in 1944 with the creation of the International Monetary Fund (IMF) and the World Bank established a new global economic order forming the groundwork of what was later described as 'embedded liberalism' (Rugie 1982).

### MICRO-FOUNDATION OF SOCIAL POLICY CHANGE: WAR IMPACT ON INDIVIDUAL PREFERENCES AND COLLECTIVE BEHAVIOUR

War is certainly an event that leads to a recalibration of individual preferences and may even affect the general normative and ontological beliefs. Both soldiers and civilians suffered from manifold war-related traumata, mostly in an early phase of their biography. Early life experiences have a particular strong impact on individual consciousness by creating a natural conception of the world which preconfigures the perception and mental processing of later experiences in the life cycle. In addition, manifold loss experiences among civilians and soldiers such as loss of physical integrity, death of relatives, loss of native land and housing, job loss and material losses caused by inflation,

robbery and expropriation were abundant in wartime and affected all social strata. "Bombs, unlike unemployment, knew no social distinctions, and so rich and poor were affected alike in the need for shelter and protection" (Fraser 1973: 193). Moreover, hyperinflation created new welfare constituencies among the better-off. The resulting effect of traumatic war experiences on life satisfaction and individual behaviour is well-documented. Psychologists and physicians found that war experiences have shaped life-long advanced moral, religious and political views and caused specific long-term ego-syntonic behaviour. Moreover, historians have studied how the social and political foundations of the postwar period have been shaped by the experience of war (Biess/Moeller 2010).

Given a wide-spread traumatization and manifold loss experiences, it is extremely plausible that war contributed to a realignment of individual preferences toward stability, security and collective insurance (Dryzek/Goodin 1986). Moreover, wars generally increase risks and make subjective risk calculation difficult (Overbye 1995: 327). In this situation, individuals typically show a greater propensity to seek insurance (Dryzek/Goodin 1986: 30), including those who would otherwise consider themselves as good risks. These changes in individual preferences may also have affected collective behaviour in at least four respects. First, the aforementioned changes of individual preferences increase the chance that policies favoring risk-sharing and risk-prevention are adopted at the collective level. The most important institutional

device of risk-pooling is the welfare state. Second, lesson drawing is important and had a similar policy impact. "Learning from catastrophes" (Schmidt 1989) has paved the way for policies and institutions designed to prevent a recurrence of similar traumatic events in the future. Third, the hardships of war encountered by large segments of the population strengthened solidarity and egalitarianism. Titmuss (1950: 508) has summarized the British experience as follows: "The mood of the people changed and, in sympathetic response, values changed as well. If dangers were to be shared then resources should also be shared". This realignment of values encouraged a qualitative change in social provision as the odium of traditional poor relief was replaced by the notion that welfare benefits should be delivered as a matter of social rights (Titmuss 1950: 517). Moreover, people became accustomed to big government that had emerged during wartime and affected the everyday life of people. Even in the U.S., habituation to the state was a hallmark of World War II (Sparrow 2011). Fourth and finally, war and national crisis stimulated co-operation among competing elites. By incorporating the opposition into war cabinets, many democracies deliberately strived for national unity and cohesion, while tripartism and conciliation gained importance in industrial relations. While World War I contributed to the recognition of unions in industrial relations and the introduction of proportional representation in numerous countries, the Second World War marked the breakthrough of fully-fledged consensus democracy and corporatism in the smaller European

countries. Even in neutral Switzerland the inclusion of the Social Democrats into the federal government in 1943 completed consensus democracy at the federal tier. Moreover, military threat and military service enhanced solidarity (Maurer 1980: 795). This increase in solidarity facilitated government interventions in the war years and beyond. The Swiss people not only adopted a constitutional provision in 1945 that empowered the federal state to introduce family and maternity benefits, but also accepted the introduction of a public pension scheme in a further referendum in 1946. This bill received the greatest support ever since the foundation of the federal state in 1848. Nevertheless, the effect of World War II on the welfare state has been much weaker compared to countries being at war (Leimgruber/Lengwiler 2009).

## THE LEGACY OF WAR POLICIES AS WELFARE STATE CATALYST

Arguably the most well-known feedback effect of war on post-war public policy is the 'displacement effect' detected by Peacock and Wiseman (1961) in their study on British public expenditure development. They argued that large scale disturbances such as major wars would alter the people's ideas about tolerable levels of taxation and shift public revenues and expenditure to higher levels during wartime. However, war-induced higher tax rates and expenditure would never return to their pre-war levels due to habituation effects, institutional rigidities and new war-related spending obligations. Pea-

cock and Wiseman also claimed that war contributes to a 'concentration process' of public spending in decentralized or federal polities. The reason is that local authorities are incapable to cope with the repercussions of large-scale emergencies so that a pooling of resources is indicated. Once an armistice has been reached, the discontinuation of the military burden as well as the enhanced institutional and fiscal capabilities of the state could be used for civilian spending purposes. Yet, displacement could also occur by pursuing new military or quasi-military projects (e.g. during the Cold War), with the shift to welfare state priorities retarded in nations which, in virtue of their Great Power status, continued to prioritize military spending. With respect to the U.S. this may explain why the promises of President Roosevelt were only kept in parts.<sup>13</sup>

Post-war democratic governments could also quickly respond to the social needs created by war as they could rely on measures, preparatory work and proposals that had been drafted or were already implemented during war. In fact,

<sup>13</sup> However, there is some evidence for the U.S. that a huge military is the provider of a 'camouflaged safety net' in the sense that the army offers welfare benefits and education to service members and their dependents (Gifford 2006). Israel, likewise a big military spender, is another country where service members enjoy generous welfare benefits (Gal 2007). This not only suggests a trade-off between military spending and social spending in countries that were involved in several conflicts in the post 1945 period, but also indicates that a military related social safety net is, at least for a particular segment of the population, a substitute for lower general welfare efforts.

many (but not all) of the measures and short-term expedients that were enacted by use of emergency powers were transferred into ordinary legislation after the war. In addition, 'war socialism' had endowed governments with plenty of experience in how to manage the economy and post-war governments benefited from the massive increase in administrative capacities, policy jurisdictions and fiscal powers that emerged during wartime (De Swaan 1988; Klausen 1998). Empirical evidence for the accelerating effect of wartime policies on post-war social policy is abundant. In Germany, the Great War was with no doubt a pacemaker for the Weimar welfare state (Preller 1978; Reidegeld 1989): "With exception of the eight hours day there is no important social policy innovation in the Weimar Republic that has not been already introduced during wartime on the basis of social rights: Unemployment compensation, short-time working benefit, child allowance, placement service, even de facto a sort of minimum wage. Not the announcement of the People's Representatives Council (Rat der Volksbeauftragten) in November 1918, but rather the Auxiliary Service Bill, the emergency legislation of war, and demobilization planning formed the basis of the Weimar welfare state" (Mai 1997: 105). In Austria, the provisional National Assembly adopted a sort of unemployment compensation by decree on November 4, 1918. Closely connected to demobilization, it was initially designed as a fixed-term and means-tested emergency benefit for indigent veterans and the unemployed workers of the arms industry (Pribram 1920: 631). After this decree was

prolonged several times it was eventually converted into a general unemployment 'insurance' scheme in 1920. A very similar development took place in Britain. The military and civilian out-of-work donation that was introduced as an emergency and temporary benefit in 1918 paved, to some extent unintentionally, the way for universal unemployment insurance in 1920: "The Government did not proceed to unemployment insurance in deliberate and calculated steps, but was driven to it at the end of 1920 by the fear of what would happen when the unemployment donation ended. Moreover, exactly as the universal unemployment donation forced unemployment insurance, the civilian part of the donation was itself consequence of the military donation [...]" (Gilbert 1970: 56).

War also has been a welfare state pacemaker in Switzerland for the very same reasons. This is, for example, true for the harmonization of unemployment benefits in 1942 and the introduction of family benefits for mountain farmers in 1944 with a view to averting a rural exodus of peasants and in order to secure food supply (Eidgenössische Zentralstelle für Kriegswirtschaft 1945: 69-72; Maurer 1980: 797-8). Moreover, the Federal Wage and Income Compensation Scheme, a programme providing income support to servicemen, served as a blueprint in terms of the organizational make-up and the financing mode of the new pension scheme introduced in 1946 (Leimgruber 2010).

In Sweden we find a similar pattern. The family allowance directed to families of soldiers was in the postwar era transformed into a general family allowance

(Abukhanfusa 1974: 224-230) and new public agencies introduced during wartime such as the Labour Market Board<sup>14</sup> continued to exist after the war (Friberg 1973: 187-196).

Finally, new programmes came to fruition because the old democracies, as much more accountable political regimes compared to autocracies, acquitted themselves of the social promises made in wartime. The take-off of the British welfare after 1945 under the auspices of a Labour government, the 1945-programmes of the Scandinavian Social Democratic parties, or the encompassing reforms enacted by De Gaulle in France are cases in point.

## WAR AND ECONOMIC GROWTH

Total war affected national economies in many ways. During wartime a large proportion of GDP was allocated to military expenses in countries directly involved in war as well as in neutral countries. After the war many countries faced a situation where infrastructure production was destroyed and the labour force as well as production capacities were also heavily affected by the war. Some of the defeated countries had on top of the destruction to compensate for war damages. This was the situation after both World Wars. It is important to notice two things. First, that the economic situation after World War I became much more dramatic as the war

was followed by the crisis 1929-1933 – and consequently, that experiences from the interwar period were instrumental for the construction of the post-1945 economic order in the Western World. Secondly, that the economic impact of the wars differed significantly between countries and consequently the net effects of war on economic growth show variation.

But war also had more positive effect on national economies.<sup>15</sup> "War clears the decks, as it were, and in this clearing process there are swept away many things which since long have become obstacles to progress" two American economists argued in 1916 (Barnett/Kemmerer 1916). The exceptional economic growth in the three decades following World War II that facilitated the unprecedented expansion of the welfare state in the so-called Golden Age is not least the result of war itself. The economic miracles in Japan and Germany are cases in point. In line with Barnett and Kemmerer, Mancur Olson (Olson 1982) has attributed the rapid economic recovery in these countries to the war-related removal of entrenched distributional coalitions. Although this story has some merits, neoclassical theory of economic growth offers a more convincing explanation. From this perspective, rapid economic growth in the post-war period is driven by catch-up resulting from the dramatic decline of GDP in war-torn economies. In 1946, output per capita in Japan was equivalent to that in 1910, in Germany to 1890 (Frieden 2006: 261). Hence the immense destruction of the capital stock

<sup>14</sup> The Labour Market Board (Arbetsmarknadsstyrelsen) started as state commission during the war and became a cornerstone of the so-called Rehn-Meidner labour market model in the postwar era.

<sup>15</sup> For a skeptic view see the introduction to Broadberry/Harrison (2005).

is an explanatory factor for the rapid economic catch-up of war-torn economies (Castles 1991) which, in addition (and in

sharp contrast to World War I), benefited from economic assistance offered by the Allied Powers.

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## 5. Outcomes: War Impact on the Development and Patterns of the Welfare State

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After discussing several possible causal mechanisms linking war and the welfare this section briefly deals with the consequences of total war for the patterns and development of advanced welfare states in comparative perspective. At least five effects of warfare on social policy might be important in this respect and all are associated with a long-lasting impact on national social policy trajectories.

### EFFECT ON TIMING OF PROGRAMME ADOPTION

War is important to understand cross-national differences in the temporal adoption of welfare programmes. There is evidence that the immediate post-war period has been a phase of rapid social policy legislation and that war and war preparation are closely associated with the introduction of particular welfare state programmes: Unemployment compensation, housing and income support to families are key areas where the state has inter-

vened for the first time on a larger scale. Legislation in these fields is strongly motivated by population policy, the demobilization of millions of soldiers and the dismissal of millions of workers related to the break-down of the arms industry after the war. The immediate post-war period was also an era of intensive legislative activity in terms of labour law, employment protection, and working time (e.g. eight hours day). In addition, categorical benefit schemes for disabled veterans and other victims of war were established. Finally, war has triggered legislation and reforms in educational affairs and housing. Britain, with the passage of the Fisher Education Act (1918), the Butler Act (1944), the National Health Service and Housing Act (1946) and the Housing Act (1949), is a case in point.

### EFFECT ON THE PUBLIC-PRIVATE MIX

War has significantly shaped the public-private mix as it paved the way toward more public welfare provision in those countries suffering from massive destruction and/or from hyperinflation. Dryzek and Goodin have argued that “under conditions of uncertainty, actuaries will be unable to assess risks with any confidence, and hence prudent brokers will refuse to supply insurance. The state alone is capable of filling this gap” (Dryzek/Goodin 1986). In addition, war upsets financial markets and therefore constrains the ability of private insurance to deliver. In fact, in most countries of continental Europe, total war has strongly crowded-out markets for social provision and discredited fully funded modes of welfare financing in the aftermath of war. By contrast the evidence is more mixed for those nations which were not struck by acts of war on their own homeland and/or by hyperinflation. The private and occupational welfare was not negatively affected but even strengthened in countries such as the United States and Switzerland. However, war is only a necessary but not a sufficient condition in this respect. Much depends on the power resources of pro-welfare state parties. Japan and, more recently, South Korea are countries where war had a massive impact, but which, under conditions of a marginalized political left, nevertheless strongly relied on private forms of social provision after the war. On the other hand, the strong left in the Scandinavian countries crowded out markets from social provision even though the war

impact was much lower. With this important caveat in mind, it is only since the 1990s – nearly half a century after the last Europe-wide military conflagration and with the removal of the Cold War threatening a repetition on an even larger scale – that private social provision has once again gained importance in several European countries.

### EFFECT ON GENDER RELATIONS

The modern mass army and mass warfare also shaped gender relations in several and contradictory ways. First, the mass conscription army served as ‘a school of masculinity’ by separating men and women and by affecting gender roles outside the military realm (Frevert 2004; Ahlbäck 2010). Second, as mentioned above, war preparations led to a growing concern with regard to the size and quality of the population which became an important argument for pro-natalist (maternalist) family policies in most European countries. On the one hand, these discourses strengthened the position of women in society and were picked up as arguments in the political debate especially by inter-war feminists (Bock/Thane 1991; Koven/Michel 1993). Moreover, the war served as a policy window for the introduction of new family policy benefits. On the other hand, pronatalism and family cash benefits reinforced the male breadwinner model and the role of women as caregivers. Third, we find examples of how reform plans were stopped once the actual war had started. This was the case in Denmark



where discussions in the so-called Population Committee were brutally put to a halt in wartime and were only picked up again after 1945 (Petersen 2011). Finally, mass conscription of men offered an opportunity for women to enter the labour market. Women's labour market participation grew during war time challenging the dominating ideal of the male provider (Thane 1982) and had lasting effects even though women often partly withdrew from the labour market after war.

## EFFECT ON SPENDING

Total war had a tremendous impact on public social spending. *Figure 2* disaggregates total social spending for Ger-

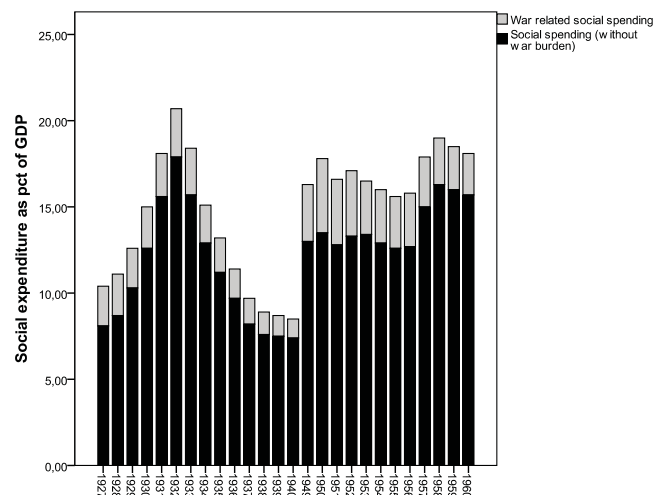
many into war-related social expenditure and 'civil' social spending. Between 1927 and 1960, war-related social spending amounted, on average, to 17.1 per cent of total expenditure.

Germany is of course an extreme case in this respect but even in less affected countries war related social expenditure played a role. War is therefore an important variable for understanding post-war spending trajectories and cross-national differences in social expenditure. Particularly the Second World War may help to explain why – and, in contrast to the expectation of functionalist accounts of the 1960s – there was no catch-up of the then welfare state laggards in social spending after 1945. An important reason for lacking convergence is that war signifi-

cantly pushed spending levels up exactly in countries which suffered from a high number of casualties and severe destructions on their homeland territory during both world wars and which already had maintained high pre-war spending levels due to the early introduction of social programmes (e.g. Germany, Belgium, Austria, France, Italy). Most welfare state laggards (from today's perspective), by contrast, were not strongly affected by war, at least on their national territory. In these countries, additional social spend-

ing caused by war was mainly related to categorical programmes tailored to the needs of veterans and their families. A third group consists of the welfare state pioneers in Scandinavia and New Zealand where the war effects were limited and mainly seem to have affected the timing of programme adoption. In fact, countries suffering from a high war impact during World War II show, on average, higher levels of public social expenditure in 1949 (cf. *Table 1*).

Figure 2: Social expenditure as a pct. of GDP in Germany, 1927-60



Note: Social expenditure data is taken from Zöllner (1963)

Table 1: Impact of World War 2 and social spending in 1949

Strong War impact	Social spending as a pct of GDP 1949	Low War Impact	Social spending as a pct of GDP 1949
Germany	13.7	Australia	4.3
Austria	11.6	Canada	6.1
Finland	6.2	Ireland	7.2
Italy	8.2	New Zealand	9.5
UK	10.6	Denmark	7.8
Belgium	11.8	USA	4.4
France	11.0	Sweden	9.1
Netherlands	8.1	Switzerland	5.8
		Norway	6.5
<b>Average</b>	<b>10.15</b>		<b>6.74</b>

Note: Social expenditure data is taken from Wilensky (1975).

## GROWING WELFARE STATE CONVERGENCE SINCE THE 1980s

While the Golden Age of the welfare state in the 1950s and 60s was characterized by growing dissimilarities in social policy, recent empirical studies are indicative of a growing convergence of social spending

and regulatory standards since the 1980s (Schmitt/Starke 2011; Höpner et al. 2011). One reason for this outcome is that the impacts of war petered out with the passage of time. Two processes are important in this respect and both are related to demographics. First, the victims of war passed away over time and thus relieved governments from previous war-related spending commitments. This effect can

be illustrated for the German case. While in 1960 war-induced social expenditure still amounted to 12.4 per cent of the German social budget, the share declined to 2.4 in 1990<sup>16</sup>.

Second, generational replacement could be related to a shift in policy preferences (Obinger 2012). Beginning in the mid 1980s, the policymakers of the Golden Age period, i.e. the political elites who had personally witnessed total war and/or the Great Depression, stepped down

<sup>16</sup> Bundesministerium für Arbeit und Sozialordnung. Materialband Sozialbudget 2001, Bonn, 27

## 6. Conclusion

While many scholars have studied the nexus between warfare and the welfare state, much less attention was paid to the manifold causal mechanisms explaining 'how' war has shaped welfare state development. This paper not only has provided an overview of various mechanisms by which mass warfare has left its impact on the welfare state in three phases of military hostilities, but has also presented related empirical evidence for belligerent, occupied and neutral countries. However, as mentioned in the beginning, the relevance of these mechanisms is likely to vary with the fortunes of war and the status of a country during military conflict.

from office and were gradually replaced from office by elites born in the post-war period and who therefore grew up in an era of unprecedented economic affluence and political stability. The traumatic experiences of the cohorts born prior to the Second World War lingered in the memories for decades. This experience is important for understanding the rise of the post-war interventionist state and the underlying Keynesian compromise, whereas the markedly different socialisation of the post-war cohorts might be one factor that has reinforced the retreat of the interventionist (welfare) state since the 1990s.

*Table 2* is a tentative attempt to assess the relevance of the discussed causal mechanisms in different settings.

In a similar vein, the cumulative effect of these mechanisms has influenced the timing, patterns and expenditure levels of welfare states in various ways and to a different degree (*Table 3*). War is therefore an important factor for understanding cross-national differences in welfare state development.

Overall, our findings support both views on the war-welfare state nexus that can be found in the extant literature. Particularly during war-time, the negative effects clearly prevail. Apart from fathom-

Table 2: Relevance of causal mechanisms by country status and phase of conflict

Country status	CAUSAL LINKS BETWEEN WAR AND WELFARE STATE											
	WAR PREPARATION				WAR PHASE				POST-WAR PERIOD			
	Health	Education	Population policy	Creation of legitimacy through social policy	Centralisation	Rise of tax state	Policy diffusion and policy transfer	Demobilisation	Needs	Preference shift	Importance of war policy legacy	Political and economic context
Aggressor	High	High	High	High	High	High	Low	High	-	-	-	-
Aggressed	Medium / High	High	High / Medium	High	High	Medium / High	High	High	-	-	-	-
Neutral	Low	Medium	Medium	High	Medium	Low	Low	-	Low	Low	Low	Low / Medium
Winner (low or moderate amount of destruction on home territory)	-	-	-	-	-	-	-	-	Medium / Low	Low / Medium	Medium	Low / Medium
Loser (high amount of destruction on home territory)	-	-	-	-	-	-	-	-	High	High	?	High

Table 3: War impacts on the welfare state

Country status	Social Spending	Timing of program adoption	Recalibration of public-private mix	Gender relations
Winner (low or moderate destruction on home territory)	Medium	Medium/High	Low/Medium	Medium
Loser (high destruction on home territory)	High	High	High	High
Neutral	Low	Low/Medium	Low	Low

less human suffering connected to combat activities and military occupation, the root cause is a pronounced guns-butter trade-off. On the other hand, there is considerable evidence that war is a catalyst of the welfare state. However, in this respect one should distinguish between direct and indirect effects as war is rarely a cause of social policy in itself but has rather affected the political and socio-economic context as well as individual and collective preferences in a way that has accelerated the expansion of the welfare state. But there are also more direct effects, notably the tremendous war-induced social needs that created a functionalist pressure to which governments had to respond. Finally, there is evidence that the impact of the Second World War on the welfare state is much greater compared to the Great War suggesting a cumulative war impact over time. This might be related to a learning process which contributed to different political responses and lessons when total warfare hit a country for the second time.

Having provided a comprehensive framework for analyzing the causal links between war and the welfare state in

long-term member states of the OECD, we claim that ignoring total war in cross-national accounts of welfare state development would be to miss out a relevant explanatory variable. Hence, the verdict by Gregory Kasza on the impact of war on politics is still valid today: "It is time for comparative politics to give this pivotal phenomenon the attention it deserves" (Kasza 1996: 370).

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## NEW RELEASES



Frank Nullmeier

### Out of the Public Eye – The International Labour Organisation in the Media

ZeS-Working Paper No. 01/2014.  
Bremen: Zentrum für Sozialpolitik,  
Universität Bremen

Politics takes place in public communication and is part of public communication. Today, public communication is substantially determined by the media. This is also the case for the field of global social policy. The following study addresses the question of how global social policy and, in particular, the International Labour Organization (ILO) as the key player in global social policy, is discussed in the media. Are global social policy and the ILO visible at all in the media? To what extent is the organisation visible? How do the media report about the ILO and on what exactly does media coverage of the ILO focus?

