

Understanding Global Shifts, Social Welfare, and Development—Unevenness in a Globalized World

Jason Powell

Social and economic inequalities are both significant and important issues in the study of globalization, while global forces have widened their consequences such as unleashing poverty and gender imbalances in terms of equality. The reasons lie in the reformulation of economic power associated with burgeoning free-market economies and accompanying diffusion of instrumental rationality, commoditization, and secularism. In contrast to the economic downturn and global softening of labor markets, which call for greater social protection, the welfare state has been replaced by a “non-sovereign power” wary of its global positioning but less powerful in shaping daily lives of its populace among social forces including the role of nongovernmental organizations (NGOs). However, nation-states still serve important functions in a globe dominated by transnational corporate interests. With few options and having to make controversial choices, welfare provision has seen trends towards the commodification of social welfare whilst globalization is affecting social contracts across nation-states. This paper critically engages in these challenges to governance and development, and assesses how social welfare has been redefined and extended while many populations become embedded in greater forms of poverty creating unevenness across nation-states.

Keywords: globalization, development, power, social services, populations, poverty

Introduction

It is the contention that the dynamics of social change has undergone a qualitative transformation in recent times that is uneven for many countries across the world. Many aspects of social life are changing, and *perceived* industrial shifts are

Jason Powell, PhD, is Professor and President of Manchester Institute of Learning and Excellence, King Street, Manchester, M2 4WQ, United Kingdom. He can be contacted at jasonpwl3@gmail.com.

unparalleled by virtue of the interconnectedness that both brings together the far corners of the globe and displaces other countries. There are startling “new” perceptions: new technologies focused on artificial intelligence, new economic relationships, new social processes, and new political processes are all perceived as characteristics of globalization (Phillipson, 2008; Powell, 2023). As the globe has contracted, people’s quality of life has changed regardless of where they live. In fact, although the propagation of free market mindsets in emerging economies has created some growth, more realistically pervasive and deep inequalities have widened poverty with devastating effects (Powell, 2023). A principal aim of this article is to explicate how these changes are of historical scale, how they are part of what social welfare is about, and how they play out in terms of risks and inequalities shaping human experience that impinges on social development.

The Persistence of Poverty

There are vast numbers of people and populations that struggle with poverty, and significant pockets of poverty portend more than lack of income (Phillipson, 2013). Those living at the bottom of the socioeconomic ladder labor under the burden of avoidable lifestyle diseases, hunger and related maladies, not to mention myriad social risks. Those on the upper reaches of the same social ladder garner disproportionate shares of the resources and are able to support comfortable lifestyles. Around the globe, there are bona fide challenges facing nation-states as they attempt to adapt to the impact of modifications in morbidity, mortality, and need gradients among diverse segments of their populations. In the face of rapid demographic transformations consequently resulting in fewer casualties from acute diseases, aging populations, and tumultuous economies, there are widening disparities between the “haves” and the “have-nots” and considerable quality-of-life inequalities within and between populations (Powell, 2023).

In developing countries, China being one of the most striking cases in point in 2023—but with parallels in a number of other developing countries—the difference in the per capita income of the urban and rural populace is at least a factor of three, with virtually no top quartile wage earners residing in rural areas. Not surprisingly, there is a tangible rural to urban migration for economic gain, thereby creating even greater disparities, as those left behind barely make a living, and that too only under the most favorable circumstances (Powell, 2023). It is impossible to overstate the risks of planetary poverty. The mass media routinely offer warnings before showing footage of wide-eyed and emaciated children in relocation camps made necessary by man-made or natural disasters. As extreme as that example may seem, it is also just the tip of the iceberg, as more than 2.5 billion of the planet’s population live on less than US \$2 a day and a billion-plus have less than US \$1 daily.

As might be ostensible, in this day and age, poverty creates conditions in which rationality is redefined, nation-states struggle to control circumstances, not to

mention corporate criminality, low birth weights are ubiquitous, ill-health is a fact of life, malnutrition is commonplace, environmental degradation is seen as the cost of doing business, and notions of social justice are brought face-to-face with priorities said to have a greater standing (Beck, 1999). Focusing on the extent of the disparities just for a moment: there is not only asymmetry but also real immiseration—only about 5% of the world's income is earned by the poorest 40% of its people.

The chasm between the rich and the poor is becoming even wider. As a stark example, the average wealth of high net worth individuals (HNWIs) climbed to over US \$4 million, exclusive of their residence. Interestingly, the greatest growth among HNWIs occurred in Eastern Europe, Latin America, and the Middle East, led by Brazil, Russia, India, and China. When the “mass affluent” population (those with less than US \$1 million but with substantial assets nonetheless) is added to the picture, the result is that the richest 20% of the world's population controls more than 75% of its wealth—this picture does not replicate the never ending ideologically driven egalitarian ethos of neo-liberalism.

Yet, in the past few decades, there have been some astonishing gains among a relatively small percentage of the world's population (approximately 10 million out of 6.7 billion people can be classified as HNWIs) who are tapped into robust gains and wealth generation strategies. As should be apparent, the ascendancy of those forces concentrating on high net worth wealth and capital accumulation among a narrow upper crust is also capable of producing abject poverty among other segments of the population (Arias & Logan, 2002, p. 197; Jessop, 2002). While the richest 1% of wealthy outliers is benefiting from speculation and the deregulation of commerce and free trade, those on the other end of the economic ladder are gaining little, if at all, as the wealth gap widens.

There are estimates that conservatively place the gap between the richest and poorest nations at an all-time high of more than 50 to 1 (Powell, 2023). Even with the stalling of mature economies, the gulf between the most advantaged and the most disadvantaged in developed countries is no less dramatic; factor in the impact of gender, ethnicity, or other social impediments and the complexity intensifies as formidable inequalities shape well-being. The disparities play out in a number of ways, extending well beyond vital income differentials to quality of life issues, education, structured dependencies, or social exclusions resulting from policy decisions (Townsend, 2007). Navarro (2007) and others add their voice to Townsend's assertion by noting that escalating differentials can be attributed in no small part to interventionist strategies adopted and endorsed by national governments. Not surprisingly, as a consequence, the richest segments of the population having far greater assets and control over their lives feel they have more in common with their counterparts in other regions than they do with their less affluent opposite number in their own regions (Hoogvelt, 1997). These trends are becoming increasingly vivid, and no government is evading the prospect of having to reshuffle what they provide to their citizens.

The Pervasiveness of Ideological Dogma

The proliferation of adjuvant ideologies evolving out of the marketplace of ideas associated with burgeoning free-market economies along with an accompanying diffusion of instrumental rationality, standardization, commoditization, or secularism have become embedded in our thinking, challenging all other relational metrics of daily life (Powell, 2023). In the process, modes of interaction and standards of assessing relational status or personal worth are recast. In both developed and emerging economies, the nature of work and the meaning of careers are also undergoing major reformulations. There is a global softening of labor markets linked to downsizing of local employment opportunities, redundancies, a spate of subcontracting arrangements, and an economic volatility abetted by technological innovations that chip away at employment security, wage, or benefit packages bringing a degree of economic and existential uncertainty to a greater number of people (Powell, 2022). Of course, such changes are not distributed evenly across all forms of employment, further exacerbating inequalities. It should also be stressed that adversity does not appear to strike women and men equally—and it is certainly reasonable to say that disadvantage begets disadvantage when downturns occur.

When it comes to gender, women are disproportionately among the most disadvantaged, and, with age, even greater hardships accrue to them. Adding to the intricacies of these unparalleled changes is the velocity with which they are taking place and the fact that they are accompanied by a deepening division between those whose principal pursuits are in subsistence or service sector markets and their counterparts who are primarily involved in large-scale export, international sectors, or equity markets (Powell, 2023). Together, these forces are bringing about a profound imbalance within and between populations as one group shares the generation of wealth while the other becomes increasingly dependent and is being subordinated to decisions made in the other sector, by a cartel half a world away (Bauman, 1998).

Without suggesting or trying to make it sound as though national governments or their policies are anything less than all-encompassing in their reach, it is also the case that national governments no longer set their own course independently of economic currents sweeping around the globe, felt in every country, and affecting virtually every policy a government might implement. This is not to say that states are mere minions of transnational interests, but it is no longer the case that the nation-state sovereignty can be taken-for-granted in the policy realm. Nor is it necessarily the case that state policies are as all powerful as they once were in shaping daily life (Dallmayer, 2005; Fraser, 2005). As Cerny and Evans (2004) so cogently assert, the welfare state of the last century has been replaced by a competitive state of the 21st century, always mindful of its global positioning (see also Hudson & Lowe, 2004).

Michel Foucault (1978) coined the phrase “nonsovereign power” when he was discussing issues of bodily control. By drawing a nice analogy, Yapa (2002, p. 15)

proposes that a parallel concept may provide insights into the vagaries of post-industrial public-sector decision-making. To make sense of domestic versus international priorities and their effect on daily life, scholars would do well to come to terms with the notion of “nonsovereign power,” as it applies to social justice, autonomy, monetary policies and capital mobility, and other forms of extranational pressures emending local policies. We would assert that, to date, there has been a real lag between transnational developments and the way analysts think of social policies.

Appadurai (2002) attributes the stumbling blocks in conceptualization to “... the disjunctures between various vectors characterizing this world-in-motion that produce fundamental problems of livelihood, equity, suffering, justice, and governance” (Appadurai, 2002, p. 6). In his characterization, proximate social issues have causes that are hardly local and call for nonparochial perspectives if they are to be addressed. As Giddens maintains, one of the most significant impacts of globalization is that it has brought an “intensification of worldwide social relations which link distant localities in such a way that local happenings are shaped by events occurring many miles away and vice versa” (Giddens, 1990, p. 64).

As a consequence, few governments are eager to make decisions separately from their reliance on global enterprise; it is as though they are in a situation of shared sovereignty, having to negotiate between domestic, international, corporatist, and transnational interests (Esping-Andersen, 1990; Hill, 2006; Kennett, 2001; Navarro, 2007; Powell, 2023). NGOs such as the World Bank and the International Monetary Fund (IMF) have also become architectural partners in local policy deliberations by sanctioning preferred welfare policies as a condition of their support of monetization (Deacon, Hulse, & Stubbs, 1997; Demebele, 2007; Hart, 2002). Even so, nation-states nonetheless serve important administrative functions in a world dominated by transnational corporate interests, and it is unlikely that governmental responsibilities are either going to be usurped or allowed to wither in light of their functionality (Hill, 2006; Navarro, 2007).

It is not too far-fetched to say that certain transnational interests see themselves as having universal jurisdiction, assertions of state autonomy notwithstanding. With the spreading of these transformations has come a reshuffling of local priorities, with governmental emoluments directed or redirected to areas defined as having the greatest public importance and bringing the greatest returns. Of course, the realities behind that assertion deserve close scrutiny, as the policy process is unquestionably political and the state must mediate rival claims, as it serves as the principal mechanism by which revenues are collected and resources distributed. Meanwhile, social entitlements, expenditures, and daily experiences for people who may not fully grasp the *raison d'être* behind their situations reflect these same priorities. Hill (2006) suggests that social policy regimes are regularly structured to be consistent with other forms of social stratification within a country. To the extent there is a convergence in social welfare policies around the globe, it might not be mere coincidence that social stratification and social class divisions are growing more pronounced in the face of globalization.

In the light of global economic flows, the salience and permeability of national borders, whether in Europe, the western hemisphere, or in the east, are a different matter than they were even half a century ago (Kearney, 1995).

In terms of both economics and domestic social policies, the impact of international economic relations has recontoured the landscape, so to speak, all the way to the regionalization and appropriation of economic relations. What were once bold lines of demarcation are now dotted lines more suggestive of administrative spheres than jingoistic borders. In the global century, deregulated markets are tightly integrated with political and social transformations, affecting local circumstances and communality (Geertz, 1973; Hendricks, 2005; Powell, 2023). All in all, the globalizing influences of the early 21st century are producing a distinctive era in social history linked to the emergence of transnational actors as well as economics and technologies that are helping fuel the shifts. Global economic change portends more than alterations in per capita income, the nature of financial products and currency markets, or the rapid circulation of goods, communication, or technologies; it is a precursor to broad cultural and political shifts that challenge precontact arrangements, notions of social justice and solidarity as well as local interaction patterns. In the postmodern world, globalization is creating interlocking dependencies linked to the ways in which priorities are ordained by transnational interests. As Chen and Turner (2006) point out in a discussion focused on the welfare of the elderly but equally applicable to all social welfare, the accrual of public benefits reflects the invisible hand of market forces, the invisible handshake of tradition, and the invisible foot of political decisions. Despite avowals about the secularity of modern life, economic thinking, what might be termed spreadsheet logic, is accorded near theological status, its canons seen as universally applicable and providing appropriate precepts for adjudicating what is considered fair and just.

These tendencies are abetted by what is sometimes called the cyber infrastructure, or more simply informatics, reinforcing these shifts and creating a digital divide, separating those on either edge of the diffusion of innovations. Of course, there is more to this technological transformation than the appearance of new ways to communicate; it has also paved the way to a post-Fordist formulation that Castells (2000) labels “network capitalism.”

It does not mean to imply that globalization comes as a unified package; it is, nonetheless, true that major changes have resulted from an ability to move capital around as summarily as desired to gain leverage, possibly destabilizing local financial and labor markets in the process. Real questions have emerged about the autonomy of nation-states and the balancing of altruistic social expenditure with economic participation on the world stage. The tensions between social protection and global connection are contributing to what can aptly be called “social deficits,” in which people are left to fend for themselves to the extent they are able. In the face of inflation and other economic adversities, slashing social spending is routinely offered as a fitting resolution preferable to raising taxes for wealthy individuals or corporations (Mishra, 1999).

The global span of information technologies and the advent of the global compass held by transnational corporations means that they are able to shift extraction, manufacturing, fabrication, and many service functions to the locale that offers the most favorable economic returns, including tax structures. These and other consequences of globalization are fraught with new risks and ambiguities in daily experience and in the way matters of worth are defined along with the many positive aspects that are undeniably part of the process associated with privatization (Powell, 2023).

In a synopsis of a few of the more evident effects of globalization, Navarro (2007) points to the privatization of services, public assets, and other public provisions in an asymmetrical fashion; deregulation of labor and currency markets as well as other forms of commerce; free trade; escalation of an accompanying anti-interventionist rhetoric; and encouragement of individualism and consumerism.

A number of commentators have noted that a corollary of globalization results in an unprecedented pattern of social risk. As Townsend (2007) so pointedly asserts, globalization of the marketplace is changing the face of dependency. It is as though the configuration of risks has shifted from settling on just those poor, down and out individuals living along society's margins to those derailed by restructuring of labor markets, the dramatic spread of employment in service sector jobs, shifts in the types of career patterns that so characterized the 20th century, and the role of informatics affecting employability of middle-class workers. These risks are not grounded merely in the absence of resources but in a total absence of personal autonomy and by people's position relative to others. Add to these factors, the fact that as they wrestle with the issues, national and local governments are assailed from multiple fronts; pressed by transnational interests to provide open trade liberalization for private enterprises; and pressed by the growing need for social protection and labor policies to sustain the working populace and those whose lives have fallen through the proverbial social safety net (Powell, 2023). Evermore inclusive protections call for targeted expenditures at exactly the time when expenditures are hemmed in by capacity to levy taxes of any type, but especially, progressive taxes and by powerful interested constituencies. The neoliberal globalizing drive has disenfranchised workers and their representatives in ways that have eroded their ability to bargain for benefits. Many commentators have noted that governments have generally adopted a *laissez faire* stance when for one reason or another they have chosen not to intervene in the disempowerment of the citizenry (Navarro, 2007).

Hegemonic Policy Responses

As a facet of a much broader movement toward privatization, governmental social services are adopting a market-based management model and relying on NGOs to take up the slack (Powell, 2022). There is a wide array of subtypes and expenditure patterns associated with every form, but an underlying logic

in nearly all instances is a push toward commodification or cost-effectiveness of the programs (couched in terms of return on investment measured by market-driven stipulations), in contrast to their ability to genuinely affect lives. Policy recipients not likely to provide economic returns on governmental investments in them tend to be defined as burdensome charity cases. As they might say in China, there are extensive changes afoot, all with Chinese characteristics meaning whatever changes may come will be adapted to local contextual factors reflecting long-standing norms, values, religions, policies, existing social metrics, and institutionalized arrangements even as they embody overtones imposed by international priorities (Dallmayer, 2005; Fraser, 2005; Powell, 2022). Unraveling the relative importance of domestic arrangements and transnational influences can be a tricky task, to say the least. It involves both an in-depth grasp of domestic issues and an international perspective, an awareness of transnational forces impinging on local decisions, and sophisticated methodological and theoretical frameworks. The commodification of social services, as it is sometimes called, is abetted by a transfer of issues of citizenship to a forum, which is no longer native in its scope but transnational, marked by intergovernmental structures, multinational corporate influence, and population changes (Ascoli & Ranci, 2002; Phillipson, 2006, p. 202). There is another layer of complexity added by a worldwide tendency to view a number of social issues through medical lens, and the insecurities experienced by the citizenry in general are without parallel in world history.

What might be described as apodictic, self-evident truths of tradition tend to lose their currency and help demarcate generational and participatory categories from one another. In the face of an unswerving drive to be players on the world stage, enhance market share, and survive economic riptides, nation-states must balance the demands of competing claimants—leaving them with fewer options, but to make hard choices. Not only do they have to adjudicate where to put scarce resources and which groups deserve protection or support, but few actions are indemnified against the next economic shortfall—meaning they will have to review their priorities anew each time the economic tides turn (Powell, 2023).

It has always been a truism that, in times of plenty, making promises about solutions to societal woes is an easy pledge to make; during times of scarcity it is a different narrative, and keeping even the best intentioned promises oftentimes creates real conflict (Powell, 2023). Societal-level redefinitions of what is fair and just are a common means to solutions that do not always do well for citizens in need of assistance, undermining personal sense of security and identity as well as social solidarity.

An illustration of a macro-level problem may be helpful for thinking about the type of quandary involved. Nation-states undergo economic development via participation in global commerce, per capita incomes generally increase, irrespective of the moment internal disparities, life expectancies increase, and demands for health care mount. Continued changes and desires to remain viable in a global economy mean a country will face enduring challenges in providing social safety

nets, medical interventions, or financing health care protections. To focus on just the health care issue for a moment: despite subsidized provisions for indigent citizens, most health care coverage around the world is linked to employment and economic productivity (workfare), and as employment is destabilized, so, too, is health care (Powell, 2022).

Needless to say, employment-based systems are costly, leading to cost shifting, which also serves to grant license to employers to cut jobs and move production around to minimize the expense of doing business. For those not covered by employment-based plans, subsidized coverage is oftentimes available but financed by taxes and premiums or by government mandated insurance groups saddled with high expectations and expenditures, but social policies supportive of indigent care for those not involved in economically productive activities are often singled out as a cost sink and are among the first issues put on the cost-cutting agenda (Jessop, 2002).

To comprehend the underpinning of certain forms of inequalities, it is also important to examine some of the transformations that are altering people's lives. One postmodernist reality of the 21st century is the existence of a digital divide between those who have always known how to navigate in keystroke technologies and those "ancients" who learned it later or not at all. Those who are comfortable with the technology have the world at their fingertips and no longer depend on local relationships or role models for solace or validation. The result is an indisputable social segmentation (Powell, 2022).

Whatever normative structures of reciprocity had existed before are likely to falter and fray under the impact of interdicting worldviews, in which the deep grammar of sociability is no longer meaningful to those versed in the newer modes of activity. At the same time, there is an explicit erosion of like-minded communities with shared representations cutting across society at large and fostering social solidarity. Instead, they are replaced by segmented, smaller communities and a blurring of ways of knowing the world. Beck, Bonss, and Lau (2003, p. 6) characterize the effects of technological innovation as "revolution through side effects" and suggest that a deep-seeded societal segmentation is a likely upshot and should not be surprising. Addressing comparable consequences, Dasgupta (2006, p. 159) phrased it succinctly:

globalization has thus created an identity crisis, since many are neither local nor global and are overloaded with changing stimuli ... resulting in a 'don't care' attitude, commercial interactions among family members, a rise of individualism and a disequilibrium ...

Transnational private enterprises cannot be ignored, as they are altering the landscape but not doing so single-handedly. It is fair to say there are both private and semi-public but NGOs involved.

Multilateral NGOs are playing an especially crucial role and certainly a role that is influencing developing countries as they sort out their welfare regimes.

For example, since the issuance of the Berg Report in 1981, the World Bank and the IMF have become major players on the world's stage oftentimes stipulating structural adjustments and preferred policies nation-states should adopt as a condition of support and to attract direct capital investments or other fiscal cooperation, including monetization. One illustration is that the World Bank began urging diminutions in pay-as-you-go (PAYG) pension provisions in favor of means-tested pension and private provisions in the mid-1990s. The World Bank and the IMF have been staunch advocates for over three decades for broadly defined market-led welfare policies as a preferred alternative to un- or under-funded public welfare (Dembele, 2007; Wade, 2007). Encapsulating both the criticisms and the confluence of forces fueling such a movement, McMichael (2000) asserts that the drive for economic integration pays little attention to nation-building, national interests, or public sector regulatory control.

Although there is a remarkable absence of consensus, social welfare is customarily taken to mean statutory governmental intervention designed to provide supportive services and resources to those in need. Straight away, one question that has to be addressed revolves around eligibility requirements and stipulations of entitlement. Issues such as gender are very much a part of the state as are discussions on family responsibilities and welfare policies. At the risk of extreme simplification, whether women are eligible for social benefits and services in their own rights or as members of a male breadwinner family is an abiding question whenever welfare regimes are examined (Powell, 2023). By the same token, gender ideologies are very much an aspect of poverty, labor markets, and other market experiences, or the myriad inequalities that cut across the life course and through virtually every facet of experience (Calasanti, 2001; Hatch, 2000; Powell, 2023; Sainsbury, 1994, 1996). These forces also affect lives in even more subtle ways beyond the realm of income, access, or protection. Just one case in point out of scores of similar situations should suffice to illustrate our contention (Powell, 2022).

It is fair to say that institutional arrangements and structural realignments have altered time and temporality, as they have altered space and other normative aspects of life. Containing our focus to the issues discussed thus far: the ebb and flow of transnational capital markets operate round the clock and penetrate virtually every aspect of governmental policy and, accordingly, daily life. Analysts generally concur that there has been a compression of time in many corners of the world, as they are pulled into global market flows (Hendricks, 2008; Steger, 1997). As should be fairly obvious, any attenuation of earlier subjective temporal reckoning requires recalibration and reintegration, as new templates are incorporated into mental models of what life is about. Analysts have asserted that globalization brings a dilation, fragmentation, and acceleration of the sense of time unsettling many (Lestienne, 2000). However, as with so many other aspects of globalization, the results do not settle on all people in equal fashion. For those who live along the margins of such change, feelings of being in control and the clarity of their proleptic future may be challenged, as the tempo, pace, and types of engagements in their lives are restructured.

Considered in a broader sense, temporal reorganization is also impacting event timing and thereby the shape of life, views of dependency, and definitions of personal worth. As normative perspectives on the shape of life are reformulated and/or personal functionality wanes, the chances increase that some subgroups within the population will lose track of their referential guidelines (Powell, 2023).

In her insightful analysis of German pension provisions, Scheiwe (1994) brings an important perspective to how institutionalized welfare rules also structure temporality. She broadens the focus considerably in her examination of time politics and gendered times in legislation that grants standing to many market-related definitions of time and discounts others associated most frequently with women's roles outside the market or which result from discontinuous market-related activities deemed to be below time thresholds written into public welfare provisions. The gendered differentials in recognizing life's events, their timing, and related circumstances serve to create essential inequalities in financial and other types of well-being.

Time and temporality, sense of the future, and eligibility for entitlements impose structure on lives in ways that may not have been intended but are highly salient, nonetheless. For the most part, a definition derived from the legendary and often cited Beveridge Report published in the midst of World War II in Britain has been utilized to identify and operationalize major features of the welfare state (Finer, 1999; Powell, 2023). Yet, that formulation begs the question of whether that world and those circumstances still exist and how they may have been modified by industrial or globalizing influences.

It could be asserted that a definition of social welfare must extend beyond questions of delivery to include its financing and function. Almost certainly, the provision of nongovernmental services through NGOs or volunteer agencies and programs should be included as well. Ambiguities notwithstanding, it is hardly surprising that scholars looking at social welfare in a comparative focus have noted that there is a fairly direct correlation between national prosperity and percentage of gross domestic product (GDP) directed at supportive programs (Hill, 2006). However, within groups of nations (such as OECD, G-7, G-8, or G-77 countries), there are differences based on governmental types or economic developments, and, we assert, in terms of underlying principles of moral economy that have shaped the formulation of welfare, whether that be public or private. Although the parameters of social welfare across all societies may at first appear obvious, there is by no means consensus on its measure or analysis.

Researchers studying social policies and social welfare have expended considerable energy to outline typologies and methodologies for comparative analysis across nation-states. Mabbett and Bolderson (1999) offer an insightful precis of the issues involved and problems encountered in setting forth what "data" should be compared. As they ask: Just what governmental or nongovernmental programs should be included in the data? For the purpose of comparison must each country have comparable programs? Do only formal provisions count, or do informal familial, communal, or religion-based care form part of the calculation? And lest

it be overlooked, there is the question of whether welfare is confined to what is generally called charitable support or are other tax exemptions and provisions to be included? Undoubtedly, there are many other forms of support as well, and depending on cultural practices, there may be variations of support available in some places that are far from normative elsewhere.

Despite quandaries of operationalization, comparative analyses have become quite methodologically important in an effort to examine particulars, convergences, or divergences characterizing diverse economies and political systems. In the end, the question is: What do such analyses contribute to an understanding of current or emergent welfare systems (Mabbett & Bolderson, 1999, p. 43)? Case studies are oftentimes offered as alternatives to broad-based comparative approaches, yet in spite of the richness of their in-depth insights, it is harder to draw generalizations that might provide templates for comparison. Here, we hasten to add that, to date, relatively few examinations of the welfare state in the 21st century have taken into account emergent global currents, opting instead to look at nationalistic patterns with an overlay of either convergence or divergence among them (Powell, 2023). There is no discounting these later analyses, as they have yielded great insights frequently couched in terms of social rights espoused by the types of welfare regimes characterizing various countries (Esping-Andersen, 1990, 2002; Hill, 2006).

Gaining perspective as a way to stimulate discussion on social welfare under the aegis of a new understanding of neo-liberalism, this argument takes tact in dissecting the effects of the unevenness of globalization. As an ideological or motivating principle, neoliberal globalization emphasizes the spread of capital markets without undue impediments imposed by national borders, privatization of public policies previously thought to be the purview of national governments, deregulation of both labor and financial affairs to spur economic growth, fostering a worldwide economy operating quasi-independently of national governments (Navarro, 2007; Powell, 2023). As noted above, this is not to say that the state may not formulate welfare policies, but to assert that these policies are synchronized with broader goals of market-based international positions. Looked at serially or in isolation, recent changes have created new vulnerabilities as new priorities have emerged. I assert that these shifts have altered the definitions of citizenship, social protection, and notions of what is fair and just.

Conclusion

Overall, the English-speaking countries are among the most conservative spenders for health and old-age provisions, while Japan is a high spender when compared to other nations. As a way to stimulate discussion on social welfare under the aegis of a new century, this volume takes a bit of a unique tact both in terms of methodologies and conceptualizations. There must be a concern with the human impact of what is often termed neoliberal globalization. As an ideological or motivating principle, neoliberal globalization emphasizes the spread of capital markets

without undue impediments imposed by national borders, privatization of public policies previously thought to be the purview of national governments, deregulation of both labor and financial affairs to spur economic growth, fostering a worldwide economy operating quasi-independently of national governments (Navarro, 2007). As noted above, this is not to say that the state may not formulate welfare policies, especially in developing societies, but to assert that these policies are synchronized with broader goals of market-based international positions.

A key lesson is that the intention for researchers should be to survey the human impact of these changes. Specifically, in providing an overview of welfare policies in the context of a global milieu and providing interpretative scaffolding for making sense of how they are changing in the 21st century. Looked at serially or in isolation, recent changes have created new vulnerabilities as new priorities have emerged, especially since the Covid 19 pandemic and its effect on all societies.

The emerging societies in the global world are shaped by inward forces of social welfare policies as well as outward forces of economic globalization, each conspiring to make welfare states uncertain in modern times (Powell, 2023). Macroscopic global trends are highlighted as undoubtedly powerful (cf. Phillipson, 2008), yet their influence can always be traced and rivaled by domestic institutional traditions in nation-states (Powell, 2023). Hence, to grasp better what drives today's social welfare systems in the world economy, it is necessary to both highlight how social foundations within nation-states are shaped and with equal coverage of how international forces on the outside shape social welfare practices of all nation-states. This is a persistent issue requiring persistent answers from critical research.

References

- Appadurai, A. (2002). Grassroots globalization and the research imagination. In A. Appadurai (Ed.), *Globalization* (pp. 1–21). Durham, NC: Duke University Press.
- Arias, A. O., & Logan, B. I. (2002). Conclusion: From globalization towards universalization in the twenty-first century. In B. I. Logan (Ed.), *Globalization, the third world state and poverty-alleviation in the twenty-first century* (pp. 197–202). Aldershot, UK: Ashgate.
- Ascoli, U., & Ranci, C. (2002). The context of new social policies in Europe. In U. Ascoli & C. Ranci (Eds.), *Dilemmas of the welfare mix: The new structure of welfare in an era of privatization* (pp. 1–24). New York, NY: Kluwer Academic/Plenum Publishers.
- Bauman, Z. (1998). *Globalization: The human consequences*. New York, NY: Columbia University Press.
- Beck, U. (1999). *World risk society*. Cambridge: Polity Press.
- Beck, U., Bonss, W., & Lau, C. (2003). The theory of reflexive modernization: Problematic, hypotheses and research programme. *Theory, Culture & Society*, 20, 1–33. <https://doi.org/10.1177/0263276403020002001>

- Calasanti, T. M. (2001). *Gender, social inequalities and aging*. Walnut Creek, CA: AltaMira.
- Castells, M. (2000). *The rise of the network society: The information age: Economy, society and culture*, (Volume 1, (2nd ed.)). Oxford, UK: Blackwell.
- Cerny, P. G., & Evans, M. (2004). Globalisation and public policy under new labour. *Policy Studies*, 25, 51–65. <https://doi.org/10.1080/01442870420002081242>
- Chen, Y.-P., & Turner, J. (2006). Economic resources: Implications for aging policy in Asia. In H. Yoon & J. Hendricks (Eds.), *Handbook of Asian aging* (pp. 67–90). Amityville, NY: Baywood.
- Cerny, P. G., & Evans, M. (2004). Globalisation and public policy under new labour. *Policy Studies*, 25, 51–65.
- Clark, G. (2007). *A farewell to alms: A brief economic history of the world*. Princeton, NJ: Princeton University Press.
- Dallmayer, F. (2005). *Small wonder: Global power and its discontents*. Lanham, MD: Rowman & Littlefield.
- Dasgupta, S. (2006). Globalization and its future shock. In S. Dasgupta & R. Kiely (Eds.), *Globalization and after* (pp. 143–183). Thousand Oaks, CA: Sage.
- Deacon, B., Hulse, M., & Stubbs, P. (1997). *Global social policy: International organizations and the future of welfare*. Thousand Oaks, CA: Sage.
- Dembele, D. M. (2007). The International Monetary Fund and the World Bank in Africa: A disastrous record. In V. Navarro (Ed.), *Neoliberalism, globalization and inequalities: Consequences for health and quality of life* (pp. 369–377). Amityville, NY: Baywood.
- Esping-Andersen, G. (2002). *Why we need a new welfare state*. Oxford: Oxford University Press.
- Esping-Andersen, G. (1990). *Three worlds of welfare capitalism*. Cambridge: Polity Press.
- Esping-Andersen, G. (2002). *Why we need a new welfare state*. Oxford: Oxford University Press.
- Finer, C. (1999). Trends and developments in welfare states. In J. Clasen (Ed.), *Comparative social policy: Concepts, theories and methods* (pp. 15–33). Oxford: Blackwell.
- Foucault, M. (1978). *The history of sexuality*. New York, NY: Pantheon Books.
- Fraser, N. (2005). Transnationalizing the public sphere. In M. Pensky (Ed.), *Globalizing critical theory* (pp. 37–47). Lanham, MD: Rowman & Littlefield.
- Geertz, C. (1973). *The interpretation of cultures*. New York, NY: Basic Books.
- Giddens, A. (1990). *The consequences of modernity*. Cambridge: Polity Press.
- Hart, G. (2002). *Disabling globalization: Places of power in post-apartheid South Africa*. Berkeley, CA: University of California Press.
- Hatch, L. R. (2000). *Beyond gender differences*. Amityville, NY: Baywood.
- Hendricks, J. (2005). Moral economy and aging. In M. L. Johnson (Ed.), *Cambridge handbook of age and ageing* (pp. 510–517). Cambridge: Cambridge University Press.

- Hendricks, J. (2008). Age, self and identity in the global century. In D. Dannefer & C. Phillipson (Eds.), *International handbook of social gerontology* (pp. 55–72). Thousand Oaks, CA: Sage.
- Hendricks, J. (2005). Moral economy and aging. In M. L. Johnson (Ed.), *Cambridge handbook of age and ageing* (pp. 510–517). Cambridge: Cambridge University Press.
- Hill, M. (2006). *Social policy in the modern world*. Oxford: Blackwell.
- Hoogvelt, A. (1997). *Globalization and the postcolonial world: The new political economy of development*. Baltimore, MD: Johns Hopkins University Press.
- Hudson, J., & Lowe, S. (2004). *Understanding the policy process: Analysing welfare policy and practice*. Bristol, UK: Polity Press.
- Jessop, B. (2002). *The future of the capitalist state*. Bristol, UK: Polity Press.
- Kearney, M. (1995). The local and the global: The anthropology of globalization and transnationalism. *Annual Review of Anthropology*, 24, 547–565. <https://doi.org/10.1146/annurev.an.24.100195.002555>
- Kennett, P. (2001). *Comparative social policy*. Buckingham: Open University Press.
- Lestienne, R. (2000). Time and globalization: Does the emergence of a global identity entail a loss of individualities. *Time and Society*, 9, 289–291. <https://doi.org/10.1177/0961463X00009002008>
- Mabbett, D., & Bolderson, H. (1999). Theories and methods in comparative social policy. In J. Clasen (Ed.), *Comparative social policy: Concepts, theories and methods* (pp. 34–56). Oxford: Blackwell.
- McMichael, P. (2000). *Development and social change*. Thousand Oaks, CA: Pine Forge Press.
- Mishra, R. (1999). *Globalization and the welfare state*. Cheltenham, UK: Edward Elgar.
- Navarro, V. (2007). Neoliberalism as a class ideology; or, the political causes of the growth of inequalities. In V. Navarro (Ed.), *Neoliberalism, globalization and inequalities: Consequences for health and quality of life* (pp. 9–23). Amityville, NY: Baywood.
- Phillipson, C. (2006). Ageing and globalization. In J. Vincent, C. Phillipson, & M. Downs (Eds.), *The futures of old age* (pp. 201–207). Thousand Oaks, CA: Sage.
- Phillipson, C. (2008). *Reconstructing old age*. London: Routledge.
- Phillipson, C. (2013). *Ageing*. London: Routledge.
- Powell, J. (2022). *Sociology of aging and death*. New York, NY: Springer Nature.
- Powell, J. (2023). *New perspectives on health and social care*. New York, NY: Springer Nature.
- Sainsbury, D. (1994). *Gendering welfare states*. Thousand Oaks, CA: Sage.
- Sainsbury, D. (1996). *Gender equality and welfare states*. Cambridge: Cambridge University Press.
- Sainsbury D. (1994). *Gendering welfare states*. Thousand Oaks, CA: Sage.
- Scheiwe, K. (1994). German pension insurance, gendered times and stratification. In D. Sainsbury (Ed.), *Gendering welfare states* (pp. 132–149). Thousand Oaks, CA: Sage.

- Steger, M. B. (1997). The future of globalization. In A. D. King (Ed.), *Culture, globalization and the world-system* (pp. 116–129). Minneapolis, MN: University of Minnesota Press.
- Townsend, P. (2007). Using human rights to defeat ageism: Dealing with policy-induced “structured dependency.” In M. Bernard & T. Scharf (Eds.), *Critical perspectives on ageing societies* (pp. 27–44). Bristol, UK: Polity Press.
- Wade, R. H. (2007). The causes of increasing world poverty and inequality; or, what the Matthew effect prevails. In V. Navarro (Ed.), *Neoliberalism, globalization and inequalities: Consequences for health and quality of life* (pp. 119–141). Amityville, NY: Baywood.
- Yapa, L. (2002). Globalization and poverty: From a poststructural perspective. In B. I. Logan (Ed.), *Globalization, the third world state and poverty-alleviation in the twenty-first century* (pp. 15–29). Aldershot, UK: Ashgate.