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The welfare mobility dilemma

Transnational strategies and national structuring at crossroads

Righard, Erica

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Erica Righard

The welfare mobility dilemma

Transnational strategies and national structuring at crossroads

This dissertation considers welfare within and beyond welfare state borders and boundaries. The inquiry takes place at the intersection of transnational social spaces and nation-states. It focuses on how the tension between a lived mobility among individual and collective transnational actors, and an expected relative immobility in national social policies, affects social welfare in everyday life. The analysis extends beyond consequences for social welfare in everyday life to concern dynamics of the expected relative immobility prevalent within national social policies.

The analysis is guided by conceptual, methodological and empirical insights from the transnational approach in migration research and the territorial approach in social policy research. Through the development of concepts and methodology, an empirically grounded discussion of welfare taking both mobility and immobility into account is pursued. This work contributes to new understandings of welfare which promote the study of the 'transnational social question'.

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The welfare mobility dilemma

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Psalm

Wisława Szymborska, 1976

Oh, the leaky boundaries of man-made states!
How many clouds float past them with impunity;
how much desert sand shifts from one land to another,
how many mountain pebbles tumble onto foreign soil
in provocative hops!

Need I mention every single bird that flies in the face of frontiers
or alights on the roadblock at the border?
A humble robin – still, its tail resides abroad
while its beak stays home. If that weren't enough, it won't
stop bobbing!

Among innumerable insects, I'll single out only the ant
Between the border guard's left and right boots
Blithely ignoring the questions "Where from?" and "Where to?"

Oh, to register in detail, at a glance the chaos
prevailing on every continent!
Isn't that privet on the far bank
smuggling its hundred thousandth leaf across the river?
And who but the octopus, with impudent long arms,
Would disrupt the sacred bounds of territorial waters?

And how can we talk of order overall
when the very placement of the stars
leaves us doubting just what shines for whom?

Not to speak of the fog's reprehensible drifting!
And dust bowling all over the steppes
as if they hadn't been partitioned!
And the voices coasting on obliging airwaves,
that conspiratorial squeaking, those indecipherable mutters!

Only what is human can be truly foreign.
The rest is mixed vegetation, subversive moles, and wind.

(Translated by Stanislaw Baranczak and Clare Cavanagh)

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Lund in March 2008

Erica Righard

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Introduction

There is a growing discrepancy between the organisation of land and people into states and citizens, and how people organise their lives. While states in general and welfare states in particular are organised in accordance with borders and boundaries significant for each state, individual and collective actors increasingly organise their everyday lives across these borders and boundaries. Welfare states conceptualise their citizens as being relatively immobile, but in fact some people are considerably mobile. This dissertation asserts that this discrepancy has far-reaching consequences for the social welfare among actors who sustain their everyday lives across borders and boundaries.

The inquiry takes place at the intersection of transnational social spaces and the nation-state. On the one hand, I address emergent patterns of international migration that are associated with new forms of labour organisation and the globalisation of capital, and which pose a challenge of rising international significance to national policy makers. On the other hand, I address social policy as being intrinsically national. It is not understood as simply existing within certain borders and boundaries, but also as generating and sustaining these. The analytical focus is on how the tension between a lived mobility among individual and collective transnational actors, and an expected relative immobility prevalent within national social policies, affects social welfare in everyday life. This book claims that while the social welfare produced within the national realm of the welfare state does not extend beyond nationally defined borders and boundaries, welfare strategies within transnational social spaces anchored in two or more nation-states demand negotiations of these borders and boundaries. The analysis extends beyond consequences for social welfare in everyday life, and into an analysis of the expected relative immobility prevalent within national social policies. This highlights pressing features of the functioning of social policies that ought to be taken into account in political debates and policy decisions at the national level.

This dissertation places itself at the nexus of im/migration and welfare state research. However, whereas much of this literature tends to regard

migrant mobility as exceptional and to assume the welfare state's expected relative immobility as 'normal', this dissertation distinguishes itself in that it considers migration and the welfare state with regard to both mobility and immobility. In the following, I elaborate the puzzle guiding the analyses throughout the book. The analyses are pursued in a three-stepwise manner that organises the book into three separate parts. While the theoretical framework and the analytical approach for each of the stepwise analyses are presented in the respective part, this introduction makes up a general presentation that serves to contextualise the theoretical perspectives and methodological approaches epistemologically.

The puzzle: welfare and im/mobility

The puzzle consists of a tension between two different conceptualisations of the organisation of everyday life with regard to nation-states: one that conceptualises everyday life as being relatively mobile across nation-state borders and boundaries, and another that conceptualises everyday life as being relatively immobile, confined within nation-state borders and boundaries. I shall relate these divergent conceptualisations of everyday life to welfare. In this way, I will be able to consider two contradictory understandings of welfare and the tension between these: (i) welfare with regard to mobility, (ii) welfare with regard to immobility, and (iii) the tension between what I denote the 'transnational frame' and the 'national frame' of welfare.

The puzzle has not emerged out of a specific empirical context and it is not anchored in certain geographical places. Instead, it has stemmed from the combination of two sets of literature. The understanding of the transnational frame is drawn from the 'transnational turn' within migration research, and the understanding of the national frame from the 'territorial turn' within social policy research. Whereas the puzzle consists of three dimensions, it has generated two research questions. These two research questions are drawn from the juxtaposition of the transnational turn within migration research and the territorial turn within social policy research: *How do transnational and national welfare diverge?* and *How is social policy constituted by and constitutive of the nation-state?* The three aspects of the puzzle are dealt with in a stepwise analysis shedding light on

transnational welfare strategies, the national structuring of welfare, and the welfare mobility dilemma.

Below I elaborate this three-dimensional puzzle and argue why it is best dealt with in a three-stepwise analysis organising the book into three separate parts. I then explicate the research questions. I discuss the transnational and territorial perspectives extensively elsewhere, and here I limit myself to giving a brief introduction that suffices to contextualise the puzzle and situate my research questions. As a final step in this section, I outline the rest of the introduction.

A three-dimensional puzzle

The *transnational turn* within migration research emerged towards the end of the 1980s and has since then proliferated. Its upsurge came about as new understandings of pre-existent findings among social anthropologists who extended their field of study in foreign countries to include field studies at 'home', which in this case means the United States. The transnational perspective involves understandings of people living their life oriented towards and anchored in two or more nation-states. It entails the construction of everyday life and identities of belonging in a transnational context, which for instance may be manifest through inter-state commuting, households divided across state borders, or significant and sustained loyalties across state borders. This alters earlier understandings of migration as a definitive movement from one country to another, as well as earlier understandings of migrants as uprooted. By contrast, the transnational perspective underscores that international migration does not necessarily imply 'uprooting' from the old country, or permanent settlement and full incorporation into the new country. The transnational perspective entails serious implications for previous understandings of integration as incorporation into, and identifications of belonging oriented towards, exclusively one polity. Influential contributions within this field are for instance provided by anthropologists Nina Glick Schiller, Linda Basch and Cristina Blanc-Szanton, sociologists Alejandro Portes and Min Zhou, and political scientist Thomas Faist¹.

¹ See for instance Glick Schiller et al. 1992; Basch et al. 1994; Portes 1997, 1998a; Faist 1998, 2000a, 2000b.

The territorial perspective² is not new as such, but has been around since at least the 1960s. Nevertheless, the recent *territorial (re)turn* is distinct from earlier versions in that it fuses previously separate abstract understandings of nation-building and social solidarity into an understanding of social policy as a ‘social dimension’ of nation-building. This understanding implies that social policy is intrinsically national in meaning and purpose. It is directed towards the people residing within certain territorial borders and functions to serve certain expected ways of living; they set frames for the everyday life. These frames coincide with the contours of citizenship, and hence it functions to foster identifications of national belonging. However, social policy does not only foster identifications of belonging, it also fosters a very concrete sense of belonging through membership in national social insurances. This is how an expected relative immobility is manifest within and through national social policy. This research direction can be said to be nurtured by critically oriented researchers such as Gail Lewis and John Clarke³, and advanced by geographically inclined social policy analysts such as Nicola McEwen and Maurizio Ferrera⁴.

The transnational perspective proposes a conceptualisation of everyday life as maintained across state borders and boundaries anchored in two or more *nation-states*, and the territorial perspective proposes it as maintained in accordance with the borders and boundaries of the *welfare state*. Whereas the transnational perspective is able to involve a global analytical framework, the territorial is not. Instead, this is concerned with social policy analysis, and consequently it is empirically limited to welfare state contexts. In a migration scholar’s vocabulary, this means that the transnational perspective is applicable in a North-South framework, and that the territorial is restricted to the North. Hence the transnational frame may consider mobility in a North-South perspective whereas the national frame is limited to social policies and the North.

² From here onward, I refer to the territorial, geopolitical, and state-building perspectives as interchangeable.

³ See for instance the volumes by Lewis (Ed.) 1998, 2004; Lewis, Gewirtz and Clarke (Eds.) 2000; as well as Clarke 2004, 2005. These are researchers affiliated with the Open University, UK, and several of the mentioned publications are written as course readers.

⁴ See for instance the volumes by McEwen and Moreno (Eds.) 2005; and Ferrera 2005a. The volume edited by McEwen and Moreno, in which, among others, Ferrera participates, has emerged from an ECPR workshop.

While none of the perspectives are limited to the everyday level of analysis, the territorial perspective is in fact primarily concerned with the policy level. The policy level refers to the institutional setting, or *milieu*: "the complexes of formal and informal political and governmental arrangements that mediate interactions among the structural context, political culture, political actors" (DiGaetano and Strom 2003: 363). National social policies are understood as embedded in its (national) institutional setting.

In Ferrera's (2005a) vocabulary, welfare state borders and boundaries generate a 'lock-in effect', in that they exert pressure on the everyday life through national social insurance schemes as well as through the fostering of identifications of belonging. The tension between the transnational and national frames of everyday life indicates a tension between a lived relative mobility across nation-state borders and boundaries at the everyday level among individual and transnational actors and an expected relative immobility prevalent within national social policies. As an abstract notion, this tension may be distinguished as a tension first between mobility and immobility, and secondly between the everyday level and the policy level. *The overall purpose of this dissertation is to scrutinize this tension with regard to welfare as a normative concept.*

Welfare is understood to be both constituted by and constitutive of the division between productive and reproductive work. This means that the organisation of welfare is understood to influence the organisation of the family in at least two ways: it frames the family as an *institution* that carries out certain functions, and it frames the family as a set of *social relations*. This understanding draws on Mary Daly's (2000) comparative study of the gender division of welfare in Germany and Britain. However, whereas Daly considers *social policy involvement* in this division, I consider borders and boundaries of welfare in everyday lives that are anchored in contexts where social policy involvement is absent. Yet I find her understanding of the relation between the organisation of welfare (though not necessarily by way of social policy) and the organisation of the family as an institution and as a set of social relations fruitful for my analyses. However, the comparative frames under consideration cover vast terrains, and it is important to note that the notion of *family* has different connotations across these terrains. In this study, the family is understood as a *collective actor*. This means that family members are understood to act collectively rather than individually. Yet precisely how this collective actor is

constituted, and what functions it carries out, are understood to vary across time and context. Thus, the family as a collective actor is treated as a dependent variable that varies across time and context.

The functions in focus are *child caring* and *parenting* and the social relations in focus are *gender* and *intergenerational relations*. Welfare with regard to the everyday level refers to the *doing of* child caring and parenting, and with regard to policy level *policies targeted towards this conduct* (this is elaborated below under ‘The analytical approach’). The welfare functions of caring and parenting are in particular involved in the division between productive and reproductive work, in that the individual involvement in caring responsibilities within the family does not only constitute part of reproductive work, but also tends to exclude participation in productive work. In this way, the welfare function of caring and parenting is also both constituted by and constitutive of social relations within the family in a very direct way. Whereas the division of productive and reproductive work varies considerably across time and context, it is intrinsically interrelated with the organisation of everyday life. It therefore makes up an interesting focus for an inquiry into welfare with regard to the tension between mobility and relative immobility, and the everyday level and the policy level, which is the overall purpose of this dissertation.

These are three aspects of the puzzle regarding welfare and im/mobility. The stipulated purpose imposes a venture of welfare into all three dimensions of the puzzle: first into the dynamics of welfare within transnational social spaces, secondly into the dynamics of welfare within national social policies, and thirdly into a comparison between these two. Hence, some kind of comparative approach is at stake, but not in a conventional meaning. This is neither a comparison of transnational welfare as performed in certain (trans)national contexts nor a cross-national comparison of social policies. Instead, I attempt a comparison of the *transnational frame* and the *national frame of welfare*. This means that I attempt a comparison of the operational logic of the transnational and national frames with regard to welfare. It also means that I urge the reader to ‘think’ welfare in two contradictory ways within a unified analytical frame. In order to accomplish this, I shall deliberately divide the analysis into three. First I present a transnational frame of thinking welfare, secondly a national frame of thinking welfare, and thirdly a ‘dilemma frame’ which takes both ways of thinking into account. The comparison is

guided by empirical, conceptual and methodological insights from the transnational and territorial turns. The empirical analyses are grounded in secondary data drawn from reviews of migration and social policy literature. That is, instead of new empirical findings, I present new perspectives on pre-existent findings. I am committed to analytical developments and I shall elaborate conceptual and methodological inputs from the transnational and territorial turns to serve the purpose of this dissertation, and to propose appropriate concepts and methodologies for further research on welfare and im/mobility.

The puzzle over welfare and im/mobility has generated two questions guiding the analysis: How do transnational and national welfare diverge? and How is social policy constituted by and constitutive of the nation-state? They both consider the tension between the transnational and national frames of welfare, but while the first focuses on tensions between organisations of welfare at the *everyday level*, the second focuses on welfare at the *policy level*. These two questions organise the following content of this section.

How do transnational and national welfare diverge?

The transnational turn within migration research studies how everyday life is anchored in two or more nation-states. This means that whereas transnational migrants bring with them norms and values, these may be put under pressure by, and may put pressure on, the norms and values prevalent within national social policies. Sometimes, the set of norms and values that migrants bring with them change in nature due to the migratory experience. Aihwa Ong (1999: 4) has pointed out that "*trans* denotes both moving through space or across lines, as well as changing the nature of something". In my inquiry into social welfare among individual and collective transnational actors, the transnational frame has proved to be of significance for the re-negotiation of social relations. Divergent patterns of (female) labour market participation, and of care, tend to produce conflicting welfares. This generates tensions which may lead to re-negotiations of gender and intergenerational relations. The spatial mobility and subsequent changes of social welfare may be conceptualised as two kinds of mobilities: spatial mobility through space and across lines, and normative mobility through the changing nature of norms and values (and social relations). I distinguish between these mobilities through the concepts of borders and boundaries. Mobility across *borders* refers to

spatial mobility, and mobility across *boundaries* to the changing nature of norms and values (and of social relations). Borders and boundaries of social welfare are interpreted in relation to both mobility and relative immobility, i.e. in relation to both the transnational and national frames. The puzzle can now be formulated as a discrepancy between the borders and boundaries of transnational *vs.* national welfare, and my questions concern the tension between the operational logics of these two sets of borders and boundaries of welfare. This takes us to the first question as stated in the title above: How do national and transnational welfare diverge? My concern is how the borders and boundaries of welfare, with regard to the family as an institution and as a set of social relations, diverge between the transnational and national frames.

The analysis of the first question does not only highlight divergent operational logics of welfare in everyday life within the transnational *vs.* the national frame. It also shows that these divergences may have far-reaching consequences for the everyday life of individual and collective transnational actors, sometimes leading to re-negotiations of social relations (i.e. gender and intergenerational relations). The second question is concerned with how national social policies can be interpreted with regard to such negotiations of social relations (i.e. with regard to national standards of welfare). Obviously, the second question has grown out of the work with the first, but while the first question takes account of social welfare at the everyday level, the second is concerned with the policy level.

How is social policy constituted by and constitutive of the nation-state?

The territorial turn within social policy research studies social policy as a 'social dimension' of nation-building. This means that social policy functions to support certain ways of living as well as to impede alternative ways of living. Of relevance for the discussion pursued here is that social policy is understood to support everyday life as lived within the national frame and to impede everyday life as lived within the transnational.

Above I state that national social policies generate and sustain borders and boundaries of welfare, and that social policies (if prevalent) are involved in the shaping of the family as an institution and as a set of social relations. The territorial perspective also suggests that social policies are constituted by and constitutive of the parameters of social solidarities and identifications of belonging. However, the transnational perspective on

migration has generated a new conceptualisation of integration. What differentiates the new transnational approach to integration from the conventional approach is that it takes account of integration into more countries than one. In this study, this understanding is taken seriously. The fact that some people live their life across borders anchored in two or more states implies that they are incorporated into more than one place. This means that when people migrate they do not only bring with them norms and values, and certain sets of social relations; these are also sustained over time. Obviously, this stands in opposition to national social policies that, in a state-building perspective, foster integration into only one place – into the national realm of the welfare state. In this sense, the tension between the transnational and national frames at the policy level may be translated into a quest for *recognition*: the (in)capability of national social policies to recognise transnational frames of everyday life.

There is a long-standing debate within political philosophy on the tension between recognition and redistribution. In this debate, high levels of redistribution are assumed to depend on social cohesion, which is understood to exclude diversity as well as mobility. And high levels of plurality are anticipated to weaken social cohesion and result in low levels of redistribution. The principles of recognition and redistribution are understood as two ideal types, present to different degrees in different welfare states (for overviews of this debate see e.g. Banting and Kymlicka 2004: 230-242; Kivisto and Faist 2007: 40-42).

Welfare states do not tend to exclude mobility overall, but to be open for mobility across their state borders in a selective way. This typically occurs through agreements within the European Union and bilateral agreements, but the acceptance of dual citizenship prevalent in some countries may also be viewed as an opening of borders to a selective group of citizens. However, whereas welfare states in a selective way may open up for mobility across their borders of welfare, this does not necessarily mean that they open up for mobility across their boundaries of welfare; whereas welfare states accept immigration and even dual citizenship, this does not necessarily mean that they are capable of a politics of recognition. This implies that the tension between the transnational and national frames at the policy level may play out differently with regard to borders and boundaries.

In order to increase recognition, Fraser (2000) suggests the deinstitutionalisation of illegitimate boundaries (or hierarchies in her

terminology) within social policies. This suggests that the recognition of transnational frames of everyday life should increase due to a deinstitutionalisation of the expected relative immobility within national social policies. Fraser's discussion is, however, primarily philosophical and not rooted in empirical cases. This approach has been criticised by, for instance, Rothstein (1998). Whereas a discussion on the *deinstitutionalisation* of illegitimate boundaries can be nothing but tentative and hypothetical, my second question concerns the *institutionalisation* of the borders and boundaries of national social policies. The question is: How does social policy manifest the nation-state?

In order to be able to handle the question about how social policy manifests the nation-state, I have delimited the study to one country, and for several reasons (besides being Swedish myself) I have chosen Sweden. The Swedish welfare state is typically depicted as *the* case of a social democratic redistributive state (e.g. Esping-Andersen 1990) and the 'Swedish model' is well known to both researchers and practitioners. A strong commitment to intervention (i.e. structuring) and to protecting borders and boundaries is expected, and I anticipate that the Swedish welfare state makes up a strong case of expected relative immobility putting vast pressure onto everyday life in general and the everyday life of transnational actors in particular. Hence, the Swedish case is chosen as a 'strong case' of the national frame. This makes it an interesting case to juxtapose with the transnational frame of welfare.

This is a dissertation in social work and (Swedish) social projects are frequently under analytic focus at my department. While the majority of these social projects are formulated in a bottom-up rhetoric, research over and over again asserts that, in contrast to their rhetoric, they actually work in a top-down direction. In a provocative vocabulary, it may be said that instead of recognising the claims made by the people, social projects tend to foster citizens (social cohesion). In this line of argumentation, social policy and social work are claimed to constitute an oppressive element. The issue is delicate, because on the other side, 'politics of recognition' can be used to disguise a hidden agenda of dismantling the redistributive welfare state (see Fraser 2005 for a discussion of the United States; and Levitas 1997 for a discussion of Britain). Besides being a delicate issue, it is also a pressing one for the social welfare of many people as well as for national policy makers. National policy makers are indeed called in to see to the issue, not least because the extensive 'globalisation literature'

indicates that, in spite of rapidly growing transborder economic and social transactions, political intervention remains confined to the national level (Kahler and Lake 2003, ref in Zürn and Leibfried 2005: 12).

In sum, this dissertation considers a tension between the transnational and national frames of everyday life. The transnational frame is drawn from the transnational turn within migration research, and the national frame is drawn from the territorial turn within social policy research. The questions consider this tension with regard to welfare at the everyday level and at the policy level. While the first question is not grounded in any specific geographical context, the second is limited to the Swedish case and the question can be slightly modified as follows: How is Swedish social policy constituted by and constitutive of the Swedish nation-state? The analysis pursued to answer the two questions is divided into three separate parts that shape the exposition of the book. In the first part, the analysis focuses on transnational social spaces and dynamics of social welfare within these. The analysis in part II is devoted to the Swedish welfare state and shows how social welfare is bordered and bounded. In part III, the intersection of the two previous analyses serves to discuss the two questions and to generate new research directions using appropriate concepts and methodologies. This outline is not conventional for a dissertation, yet I have found it appropriate due to the nature of the study. Consequently, this introduction is also unconventional, and I shall therefore provide the reader with an outline of the introduction.

Outline of the rest of the introduction

The disposition of this dissertation into three separate parts has a bearing on the disposition of the introduction. The two research questions posed are approached in a three-stepwise analysis that corresponds to the three dimensions of the puzzle. I consider each aspect of the puzzle in a separate analysis: (i) welfare with regard to transnational social spaces, (ii) welfare with regard to national social policy, and (iii) the tension between the transnational and national frames of welfare. In each part, I present a theoretical framework, an empirically grounded analysis, and a discussion. Since the analytical frameworks applied in the empirically grounded analyses are presented in each part, this is not the purpose of this introduction. Instead, the introduction is written to put the applied theoretical perspectives and methodological approaches in epistemological perspective and to identify the research gap targeted, as well as to provide

the reader with a general presentation of the analytical approach, i.e. how the three parts are interrelated.

I devote considerable space to epistemologically contextualising the transnational turn within migration research and the territorial turn within social policy research. I do this by discussing international migration and (Swedish) social policy with regard to (i) changing historical forms, (ii) changing forms of knowledge, and (iii) changing methodologies. I take up these discussions for specific reasons. At stake are on the one hand *national* social policy and, on the other, *transnational* social spaces that transcend the national realm. It is not unproblematic to problematise national social policies by taking up societal processes of globalisation. Yeates (2001: 19) has pointed out that the integration of the globalisation perspective "into the field of social policy poses questions about many of the assumptions, concepts and theories that have been integral to social policy analysis. Social policy as a field of academic study is ill-suited to thinking beyond the nation-state as its theories and concepts were developed in a national context" (see also discussions by Wimmer and Glick Schiller 2002; Clarke 2005). This implies that special demands on the analytical approach need to be taken into account.

Skocpol and Amenta (1986) have pointed out that in social sciences, "changing questions and ways of seeking answers are just as important as accumulations of research findings". I find this true, not least concerning the perspectives applied here. In addition, I have found it fruitful to consider changes in questioning and ways of seeking answers, i.e. changes in knowledge and methodology, in relation to historical changes in society. Below I discuss social policy and international migration in terms of 'Changing historical forms', 'Changing forms of knowledge', and 'Changing methodological approaches'. The discussion of changing historical forms positions emergent patterns of international migration and national social policies in a historical context. Changing forms of knowledge position the transnational and territorial perspectives in relation to alternative theoretical perspectives often referred within migration and social policy research. Finally, the part on changing methodological approaches describes how the transnational and territorial turns have contributed to bringing migration and social policy analyses beyond the state as a taken-for-granted entity of inquiry. In order to enable a questioning of 'national' assumptions immanent in concepts and theories, I pay special attention to 'territoriality' in these discussions.

Against the backdrop of these meta-theoretical discussions, I enter a discussion of the state of the art and identify the research gaps that this dissertation aims to contribute to. I point out a relative gap of welfare research at the intersection of the transnational and territorial turns. This research gap is not merely a knowledge gap, but also a methodological gap. I consider implications of this methodological gap with regard to the production of knowledge about welfare. Since Sweden is under focus in the part on the nation-state and social policy, I do so in particular with regard to research conducted in Sweden.

The subsequent section of the introduction describes the analytical approach of the dissertation. In each of the three parts I present an analytical framework for the analysis in that specific part, and here I concentrate on how these three frameworks are interrelated. I conceptualise the transnational and national frames with regard to their spatial reach and implications of these. I also conceptualise welfare, regarding both the everyday and the policy level. In the analyses of the transnational and national frame in parts I and II, I apply different analytical tools. Here I give a first introduction to these and clarify how they are interrelated. As the final step of the analytical approach, I describe the sequential character and the empirical grounding of the three-stepwise comparative approach. At the very end of the introduction, I present the outline of the book.

Changing historical forms

Migration and social policy are unsettled entities of inquiry shifting across time, place and context. In this section I present a very brief historical account of the changing forms of international migration and (Swedish) social policy with a particular focus on borders. I do this in part to contextualise the discussions on changing forms of knowledge and methodological approaches with regard to societal changes, and in part to clarify what the empirical focus of this dissertation is.

International migration: Social cohesion and time-space compression

International migration is an inherently political process shaped by the organisation of the world into congeries of mutually exclusive sovereign

polities (Zolberg 1981, 1989, 1999). In its historical form, the international system of sovereign states goes back to the end of the seventeenth century when the polities that characterised medieval Europe began to transform into a 'society of states' (Held et al. 1999: 37). The European system of states emerged simultaneously with a new conception of international law that is usually referred to as the 'Westphalian model' after the Peace Treaties of Westphalia in 1648 (Held et al. 1999: 37). The model refers to a system of sovereign states that set their internal affairs independently of other authorities and that are involved with other states through diplomatic contacts. The model did not achieve full articulation until the end of the eighteenth and early nineteenth century, when territorial sovereignty became a core principle of the international society (Held et al. 1999: 37).

International migration refers to the transfer of a person from one jurisdiction to another. Such data are typically systematised as quantitative measures in national data bases as well as within international organisations such as the United Nation. In spite of difficulties with unsynchronised data, relatively good measures of migration trends counted in numbers may be obtained, and for instance the United Nation has estimated international migration to have doubled over the years 1960-2005⁵ (Population division of Economic and Social Affairs of the United Nations Secretary 2005). Drawing on these UN data, Hammar and Tamas (1997) have created a world map illustrating the major migration flows over the years 1980-1985. The two overwhelmingly strongest migration flows go from Latin America and the Caribbean to North America, and from Southern, South-East and East Asia to North America. However, international migration across territorial jurisdictions becomes transnational only when "it creates overlapping memberships, rights and practices that reflect a simultaneous belonging of migrants to two different political communities" (Bauböck 2003: 705). Since these aspects of migration usually are not covered by data bases, it is rather problematic to estimate the quantity of transnational migration from pre-existing data bases.

It has been a matter of dispute to what extent transnational migration is a phenomenon qualitatively different from previous migratory flows,

⁵ It is important to note that, in part, 'international migration' is due to changes of the composition of some regions, such as the former USSR and Yugoslavia, instead of individual movement.

and a frequent answer has been that it consists of something new and something old. Glick Schiller (1999: 95) has argued that "transnational migration and the transnational political practices of nation-states are not new phenomena. Two things, however, are new": The context has changed, and scholars have developed a paradigm of transnational migration. Whereas the paradigm shift is the topic of the next section, here I focus on contextual changes.

On the most general level, relevant changes involve processes of globalisation. "Globalisation can be taken to refer to those spatial-temporal processes of change which underpin a transformation in the organisation of human affairs by linking together and expanding human activity across regions and continents" (Held et al. 1999: 15). The impact of technological advancement on migration dynamics is not obvious but usually emphasised in this debate. While technical advancement cannot serve as an explanatory perspective on social cohesion (within or across state borders), it definitely serves to explain the transfer of individuals from one jurisdiction to another as well as the communication of social and symbolic ties explaining social cohesion across borders (see e.g. Vertovec 2004). Technical advancement is assumed to have had an impact on nation-building. For instance, Gellner (1983) has pointed to printing presses, steamboats, trains, urbanisation, industrialisation etc. in the process of modernisation, and Anderson (1991 [1983]) has underscored the bearing of print capitalism. It is plausible that technical advancement with reference to jumbo jet transports, cheap phone calls, and 'internet-capitalism' has a reciprocal impact on the emergence of transnational patterns of migration. This is not to say that it has caused or sets off the emergence of transnational migration, but these are the avenues along which social and symbolic ties are communicated. The ongoing communication and transport revolution has considerably cut the costs of bridging long geographical distances and has sharply accelerated since World War II (Faist 2000*b*).

Social policies: From poor law regime to multilayered social citizenship

In Sweden, as in many other European countries, in the seventeenth century a public and more cohesive poor law emerged (Wallentin 1987; Geremek 1994 [1986]). The Swedish poor law is related to the regulations about servile labour (*legostadgan*) and rooted in charity and a will to

eliminate begging (Wallentin 1987: 9). The poor law dominated the social assistance until it was gradually replaced by modern social insurances, which in Sweden happened during the second half of the nineteenth century (Edebalk 1996; Åmark 2005). But in Scandinavia, the 'poor law regime' was never entirely abolished as in Britain. Instead it remained as a selective social-security net beneath the universal social insurances that characterise the modern welfare state (Lødemel 1997). In Polanyian words, this change can be said to have occurred because the old 'poor law regime' could not handle the new social needs that emerged as part of the 'great transformations' of the nineteenth century.

The emergence of modern social securities is intrinsically interconnected with the transformation of servile labour to free labour and, which is of particular interest here, to different perceptions of borders. The selective (and means-tested) social-security net is administrated at the municipal level, and the universal (modern) social insurances at the state level. This means that they are bordered and bounded differently in territorial terms. Constructions of borders and boundaries are historically determined. While in pre-modern society, belonging was determined in relation to a centre and by the religion, in modern society it is determined by territorial borders and citizenship. Both poor law relief and redistributive welfare benefits are aimed at those who are defined as 'belonging', i.e. considered members of the (imagined) community. Swedish historian Monika Edgren (2001) has in one sentence described the economic and political development in Sweden during the eighteenth century to be a transition from a regent-based imagined community to a state territorial national identity project. The pre-modern state was organised around and defined from a centre, not from the territorial borders which were unclear and diffuse. The inhabitants were defined in relation to a *regent*, not a nation-state. Labourers were bound up with well-to-do farmers through different forms of legislation whose purpose was to supply the farming with the labour needed. In contrast to this, the modern welfare project was created within the frames of the state *territorial* project.

Since the mid-1980s or so, the state territorial project has been challenged by processes transcending state territorial borders: processes of globalisation. But how globalisation is to be characterised, and what the consequences are, comprise a matter of dispute (e.g. Palier and Sykes 2001). Irrespective of what impact globalisation has had on the national

welfare state, obviously there is an emergent layer of social rights increasingly administrated not only across state territorial borders, but *above* the state level at a supra-state level. Social rights administrated through the European Union involve processes that unequivocally transcend the state territorial project. This is not to say that the EU *per se* is engaged in policies aimed at redistribution and welfare provision, which are left to the member states. But it is to say that the EU is engaged in the coordination of social rights across the member states, and that this eventually may have consequences for the redistribution and welfare provision due to processes of Europeanisation within member states (Kivisto and Faist 2007: 122; Ette and Faist 2007). This reality has given rise to analysis of multi-layered, multi-tier, and nested social citizenships (e.g. Yuval-Davis 1999; Faist 2001). For such a multi-layered analysis, the municipality, the state, and the European Union are relevant layers in the Swedish case, and under certain circumstances an additional ‘global level’ may be relevant (e.g. when human rights have relevance). Whereas it is important to recognise that the national level is influenced by and influences the other levels, the analyses in this study are limited to considering the national level. Hence, I do not consider processes at the global, European or regional levels in the empirically grounded analysis in Parts I-III although they may be viewed as influencing the processes analysed.

Changing forms of knowledge

Social scientists have analysed international migration and social policy by referring to different theoretical frameworks and explanatory variables. I shall scrutinise some central theoretical frameworks and explanatory variables, and position the transnational and territorial perspective in relation to these. Transnational social spaces refer to spaces *across* state borders, and national social policy refers to social policies *within* state borders. Territories and borders dividing territories are thus at stake, and I have found it relevant to explore how theoretical frameworks of international migration and social policy relate to territoriality and to ‘territorial thinking’. Territorial thinking refers to assumptions about state territories, often implicit or taken for granted in social theory. The discussion below does not consider each theory in detail, but rather seeks

to distinguish between three different notions of such territorial thinking prevalent within different theoretical frameworks. The three notions of territorial thinking comprise (i) thinking with reference to states as naturally given entities, (ii) thinking with reference to hierarchies within and between states, and (iii) thinking with reference to states as historical institutions. These ways of thinking are informed by territorial assumptions that may be conceptualised as an international system of *independent* states, as an international system of *interdependent* states, and as a global system of states with historical legacies.

Logically there is a greater awareness of territoriality, and of implications of different perceptions of this, in theories of international migration than in theories of social policy. This is due to the nature of the disciplines: international migration spans state borders, while national social policies do not. Nevertheless, theories in both disciplines tend to reflect taken-for-granted perceptions of territoriality. In the following, I discuss these territorial ways of thinking and related explanatory perspectives in relation to social theories of social policy and of international migration.

Westphalian thinking

The Westphalian model is not merely a historical form of territoriality, it is also mirrored in social theory and methodology. In *Westphalian thinking*, states are discrete and presupposed entities of inquiry. In the widest sense, convergence and consensus theories are rooted in the Westphalian thinking of territoriality. With regard to social policy, this involves the modernisation thesis and neo-Marxism, and with regard to migration, push-pull theories.

The modernisation thesis and neo-Marxism are both based on the explanatory perspective of *functional structuralism*. "Despite different terminologies, there is a considerable overlap between logic-of-industrialism and neo-Marxist understandings of the societal need to which social policies putatively respond" (Skocpol and Amenta 1986: 135). In the *modernisation thesis*, all nations are thought to be caught up in the logic of industrialisation. This means that regardless of the characteristics of a specific regime, industrialising nations will overall converge into similar sequences of social policy and welfare state development. *Neo-Marxism* focuses on the transition within the capitalist mode of production from early competitive capitalism to advanced

monopoly capitalism, and the functional demands on the state as this change occurs. Social policies are here viewed as responses to 'social reproduction' needs of advanced capitalism, including the need to prepare appropriately motivated and skilled waged workers (Skocpol and Amenta 1986: 134). Hence, while neo-Marxists put greater stress on requisites of labour control, the modernists stress the logic of industrialisation. Overall, functional structuralism faces challenges not only in explaining social policy variations between states, but also in identifying the political actors that initiate and shape public policies.

When it comes to international migration, the Westphalian thinking is mirrored in *push-pull theories*. These are economic theories of international migration originating from rural-urban migration analyses (de Haan 2000). While the earlier articulations of these (neo-classical) economic theories of migration (Todaro 1969; Harris and Todaro 1970) assumed that migrants act individually, the 'new economics' of migration (Stark 1991) assumed that the decision to migrate takes place on the household level instead of the individual. Overall, push-pull theories assume that migration is negotiated upon in accordance with a rationality of economic self-interest, which here means taking wages and expected chance of employment differentials into account (McDowell and de Haan 1997: 6-7). This assumption may be claimed to represent a variant of the 'modernisation thesis' on the individual level. The interest in economic maximisation is not questioned, but seen as 'naturally' given just like the 'logic of industrialisation'. This means that the 'logic of industrialisation' at the macro level translates into a 'logic of economic maximisation' on the individual level, and all individuals/households are assumed to have equal chances of migration and economic maximising. With regard to territoriality, push-pull theories are based on an understanding of the labour market as being *dual* (Held et al. 1999: 38). This means that they are informed by the Westphalian thinking and the conceptualisation of territoriality as a system of *independent* states with no common governance to shape migration.

Hierarchical thinking

Obviously, the developmental track diverged across the world and migration flowed in certain patterns apparently structured beyond the individual/household level. The approach of functional structuralism, prevalent in the modernisation thesis/neo-Marxism and push-pull

theories, is incapable of explaining these divergent developments and unequal dependences between states. The world-system approach and dependency theories emerged in the 1970s as a critique against these shortcomings. Of particular relevance in relation to territorial thinking is the introduction of a new analytical lens. Influenced by dependency theory, Wallerstein (e.g. 1974, 1980) lifted the analytical lens from the nation-state to the global order and introduced what I denote as *hierarchical thinking*. Central here are core, semi-peripheral, and peripheral states and the unequal economic dependencies between these. As a major contribution, Wallerstein aimed at a critique of developmentalism and modernisation theory which dominated the social sciences in the 1960s, and as a major deficit he reproduced what he himself was criticising (see Benton 1996 for an overview of the criticisms). In celebrating his attempt, Skocpol (1977: 1089; cf. Benton 1996: 269) has critically conceived that "Wallerstein hoped to overcome the worst faults of modernization theory by breaking with their overemphasis on national states and their tendency towards ahistorical model-building. Ironically, though, he himself ends up reproducing the old difficulties in new ways. Thus, strong states and international political domination assume crucial roles in his theory". This means that instead of going beyond, the world-system approach reproduces states as taken-for-granted entities of inquiry by organising them into a hierarchical order and labelling them as core, semi-peripheral or peripheral states. Yet, and as a major contribution, this thinking makes clear that hierarchies and unequal distributions of resources have implications for states and the people inhabiting these states. While in the international system of *independent* states, all states are assumed to possess equal opportunities for development, in the system of *interdependent* states these are assumed to be unequal. This is why I denote it as a system of *interdependent states* (as opposed to a world system). With reference to social policy, hierarchical thinking involves theories of 'political actors'; with reference to migration, it involves migration system theories, and the explanatory variable is typically located in power structures. Within this thinking, both social policy and migration research continue to refer to the nation-state as a taken-for-granted entity of research, but while migration research lifts its analytic lens above the nation-state system, social policy research remains within it.

'Political actors' theories refer to social theories of social policy that place the explanatory variable in the *power resources* of certain political

actors. This means that the explanatory variable is seen in how *power structures are mediated by the agency of political actors* (or how the agency of political actors mediates power structures). Skocpol and Amenta (1986) have organised this direction of research into four groups which I will refer to in the following⁶: simple democracy, the mass disruption thesis, the social democratic model, and Catholic party power. *Simple democracy* refers to hypotheses about whether formal democratic structures, mass electoral participation, or competitive elections seem related to the origins or growth of social policies, leaving aside their class basis or the substantive ideological commitment of political forces. The *mass disruption thesis* is a marginal research direction, and refers to an understanding in which increased welfare benefits occur as concessions by elites to protests by the poor and workers. In the view of the *social democratic model* (often referred to as the power resource theory), the class division between capitalist and wage workers is the fundamental axis of power and of political struggles. Democracy enables wage workers to become highly organised, and thus the class struggles are shifted into the political arena where workers are favoured due to their numbers. Clearly, the model applies best to the development in Sweden, and Skocpol and Amenta (1986) continue by pointing to the roles of alternative political parties, coming up with *Catholic party power*. Like the social democratic model, the Catholic party power approach is most useful if it is taken as an analysis of one among alternative routes to welfare-state expansion. Significant for the social policy research discussed here is that it sees to divergent developments between states, but treats states as a 'natural' entity of inquiry. It explains social policy development by looking at political actors and how these have influenced (or not influenced) power structures within a specific territorial context.

Looking at migration theories, here states are believed to make up a system of *interdependent* states. International migration occurs in this system as patterned flows depending on the relation between the countries of origin and of destination (e.g. Tilly 1990), which is assumed to be characterised by economic dependencies and inequalities. In this line of theorisation, migration tends to be reduced to labour migration and immigrants to workers, "eliminating all discussion of the many different

⁶ Skocpol and Amenta (1986) denote this research *democracy*. Gough (2005: 9-10) has criticised this and proposed it to be denoted *political actors*.

racial, ethnic or national identities which shape people's actions and consciousness. Migrants are indeed providers of labour power for capitalist production in a world economy, but they are at the same time political and social actors" (Basch et al. 1994: 12).

As a shortage, the hierarchical thinking cannot help us to understand why political struggles with similar political goals, performed for instance by the labour or feminist movements, did not generate similar outcomes in a cross-national perspective. Or: why does migration not flow out of all poor (geographical) places and into all rich ones equally? This missing link is discussed in the subsequent section.

Institutional thinking

While the Westphalian thinking is constrained to single states, and the hierarchical thinking orders these states into a hierarchical order, the (*historical*) *institutional thinking* takes a state-oriented view of governances and authorities, commonly but not necessarily consistent with (Westphalian) state borders. The historical institutional approach might well be characterised as a move away from a taken-for-granted territoriality, in that political processes are not studied in territorial isolation. Instead, as a taken-for-granted entity of inquiry, the state is put under analytic focus. This development involves an orientation not only towards taken-for-granted institutions such as the state, but also towards likewise taken-for-granted borders. Central here in relation to social policy is comparative historical institutionalism in which the territorial perspective is embedded, and, in relation to migration, theories of transnational migration.

Historical institutionalism (also denoted 'new' institutionalism⁷) involves historical patterns of institutions, and how they shape and are shaped by individual agency. In this way it "captures the dynamic play of humans both as agents and subjects of historical change" (Thelen and Steinmo 1992: 27). This means two things. First, that it takes stock in historical patterns of institutional change and relates these to individual agency. Second, that just as (for instance) power structures are mediated by the agency of political actors (or as the agency of political actors mediate power structures), *power structures mediate the agency of political*

⁷ See Thelen and Steinmo (1992: 3-7) and Thelen (1999: 372-384) for a discussion on what is new about *new* institutionalism.

actors (or the agency of political actors are mediated through structures of power). That is, in contrast to the hierarchical thinking which sees to how variances of power structures are constituted by agency, the institutional thinking *adds on* how these structures are constitutive of the agency of these actors. Hence, the institutional thinking is to be understood not in opposition to the hierarchical thinking, but as a major difference the explanatory factor is located in (historical) *causal structures* of political institutions instead of power structures (which here are rather an outcome). It involves theories of middle range (Merton 1968) and underscores state/citizen relations. In contrast to the rationality embedded in industrialisation and economic maximising, or in power structures as an equilibrium (at various levels), here the rationality is embedded in relations.

Transnational migration refers to international migration that occurs within transnational social spaces or fields. Theoretical frameworks of transnational migration underscore sustained ties across state borders as an explanatory factor of (transnational) migration. In the words of Thomas Faist (2000a: 199-200; see also 1998, 2000b), these consist of "combinations of sustained social and symbolic ties, their contents, positions in networks and organizations, and networks of organizations that can be found in multiple states". Thus, in Faist's view, what separate transnational migration from international migration are overlapping social and symbolic ties across borders (see also Bauböck 2003). While transnationalisation is related to globalisation, there is also a distinct disparity in that transnationalisation has a more limited purview. "Whereas global processes are largely decentred from specific nation-state territories and take place in a world context above and below states, transnational processes are anchored in and span two or more nation-states, involving actors from the spheres of both state and civil society" (Faist 2000b: 192).

Changing methodological approaches

Changing forms of knowledge imply changes with regard not only to what research questions are asked, but also to how these are approached. Here I clarify some core characteristics of two methodological approaches connected with institutional thinking: the *multi-sited* and *state-centred*

approaches. These are not to be understood as specific methods or techniques, but as approaches in a broad meaning. They have evolved in opposition to approaches that assume the state as a taken-for-granted entity of inquiry, and follow the critique of what sometimes is termed *methodological nationalism* (e.g. Glick Schiller et al. 1992, 1995; Wimmer and Glick Schiller 2002). Wimmer and Glick Schiller (2002: 302-308) have discussed three aspects of methodological nationalism: (i) the national framing of social sciences and its analytical thinking, (ii) the national framing of empirical practices, and (iii) the national framing of sites of inquiry. The state-centred approach is a critique against the national framing of empirical practices, and the multi-sited approach a critique against the national framing of the sites of inquiry. Whereas I here leave out the national framing of the social sciences, I return to it below in a discussion of the nation-state and its social sciences.

State-centred approaches

Here the state as a taken-for-granted entity of inquiry refers to an assumption about the state as an independent variable in empirical analyses. This means that political government is not taken account of in any depth. By contrast, state-centred approaches assume the state as a dependent variable. This, in turn, means that political government is taken account of. Much comparative research assumes the state as a taken-for-granted entity of inquiry in that it considers certain government *functions*, whereas the governmental *functioning* is made less significant (Skocpol 1985: 4). In the words of Wimmer and Glick Schiller (2002: 304), this means that "empirically oriented social science practices, is taking national discourses, agendas, loyalties and histories for granted, without problematising them or making them an object of an analysis in its own right". The state-centred approach arose as a critique against the state as a taken-for-granted entity of inquiry, and argues that the state should be placed at the centre of analysis.

The book *Bringing the state back in* (edited by Evans et al. 1985*b*) is generally recognised as an important marker in the upsurge of the state-centred approach. In this book, the authors present a range of empirical analyses with the state and its operational logic at the centre of analysis. It is a general statement of the book that grand theorising about the state is the wrong way to go. "Rather we need solidly grounded and analytically sharp understandings of the causal regularities that underlie the histories of

states, social structures, and transnational relations⁸ in the modern world", Skocpol (1985: 28) argues. Instead of a coherent methodology, the editors propose that states be studied through a lens of *analytical induction* and *historically grounded comparisons* (Evans et al. 1985a). This means that the state-centred approach is based on historical institutionalism and theoretical argumentations of the middle range⁹ grounded in empirical cases.

Within this approach, research questions, concepts and hypotheses are typically drawn from existing theoretical frameworks, and explored through comparative and historical research. The empirical data may be primary or secondary – drawn from historical publications or archives or gathered elsewhere. In this way, state-centred approaches engage in theoretical advances without going into grand theorising (see for instance the edited volumes Evans et al. 1985b and Mahoney et al. 2003). Skocpol (2003: 409) has argued that it is important to understand that the comparative historical approach is a doubly engaged enterprise: "Aiming to understand real-world transformations, its practitioners are simultaneously enmeshed in scholarly debates about causal hypotheses, theoretical frameworks, and optimal methods of empirical investigation". In such work, it is important that analysis and understanding of states is distinguished from critique and prescription: "Normative reflection must be kept alive in forms that do not cut short analysis and understanding" (Evans et al. 1985a: 364).

The state-centred approach is not a distinct method but rather a methodological direction based within comparative historical analyses. The implications for social policy and migration research are dispersed and not easily summarised. Nonetheless, Amenta (2003: 105-109) has argued that one of the greatest advantages is that the approach has allowed scholars to ask *big* questions about social policy development. This has set off a process of conceptual deepening and new research agendas. It has also opened up for the re-thinking of the meaning of social policy as a dependent variable. As researchers have asked big questions, these have not been formulated with regard to what data are available. The questions have included: Why did social policy take off when it did, and why did it become so prevalent? Why did some countries lead and why did some

⁸ Here *transnational relations* refer to how states relate to and influence each other.

⁹ See Merton (1968) for discussion on theories of the middle range.

others fall behind in different phases of the development of social policy? Why did some states adopt distinctive forms of social policy? By comparing the experiences of different countries with general trends, comparative and historical analysts have illuminated historical anomalies and puzzles to solve (Amenta 2003: 105). In his discussion, Amenta underscores the focus on the phases of development in social policy as particularly enriching. This has contributed to important understandings about social policy, such as that the adoption of social policy may be determined by different causes than its expansion or its retrenchment. It thereby challenges the focus of much social policy research.

Whereas state-centred approaches are a much-debated topic in relation to research on social policy and welfare state development, it is not equally so with regard to migration research. Yet, in understanding migration as a transnational event *anchored* in two or more nation-states, the state-centred approach carries implications with it. From this perspective, transnational social spaces and migration therein are not understood to depend on migrants as independent movers, but on how these are tied up in social and symbolic relations at each site of migration. This means that social relations and how these congregate into larger units of bounded spaces, such as communities and nation-states, are anticipated to influence the emergence of transnational social spaces and migration therein. This has stimulated the formulation of big questions such as: Why are there so few migrants out of most places, and so many out of few places? Why does transnational adaptation follow certain patterns of accommodation in some countries and other patterns in other countries? Why do some countries adopt distinct forms of migration control and migrant policies (such as multicultural policies, naturalisation and dual citizenship)? Just as in the case of social policy, here comparative historical analysis may enrich our understanding. I now turn to the discussion of the multi-sited approach. This is related to the state-centred approach, but is more limited in scope, being primarily concerned with migration studies.

Multi-sited approaches

The multi-sited approach originates from social anthropology and refers to approaches that include fieldwork in more than one country. Anthropologist involvement in migration research grew out of research in sending countries, from where it extended to include the receiving country (Foner 1999). In fact, it was within this vein of research that the upsurge

of the transnational turn within migration research is found in the 1980s (Basch et al. 1994; Glick Schiller 1999). However, it is important to note that the transnational turn did not emerge from new empirical observations, but as new understandings of the transnational process within pre-existent observations of international migration (Basch et al. 1994; Glick Schiller 1999).

The multi-sited critique of the state as a taken-for-granted entity of research hooks into the critique against the national framing of sites of inquiry and fieldwork. This means that the state as a taken-for-granted entity refers to "the territorialisation of social science imaginary and the reduction of the analytical focus to the boundaries of the nation-state" (Wimmer and Glick Schiller 2002: 307). The transnational perspective and multi-sited approaches have generated understandings of livelihoods maintained across borders. Glick Schiller et al. (1995: 48) have argued that "once we reframe the concept of immigrant and examine the political factors that shaped the image of immigrants as the uprooted, a whole new approach to understanding immigrants and the current debate about immigration becomes possible" (see also e.g. Malkki 1992). Thus a questioning of the assumption about integration into a *single* polity as a natural given has followed on the multi-sited critique. Advocators of the multi-sited approach argue that instead of incorporation studies, migration researchers should engage in advancement of understandings of cross-border integration. Obviously, for this purpose the multi-sited approach is indispensable.

Moreover, the multi-sited approach has influenced the ethnographic methodology beyond the extension of the number of field sites. Whereas ethnography conventionally has focused intensively upon a single site of observation and participation, deriving the macro-context by other means and methods, understandings beyond the state as a taken-for-granted entity of inquiry has stimulated the upsurge of an alternative to this. The movement among field sites has led to an inclusion of the macro-context into the ethnographic methodology (Marcus 1995). Just "as this mode investigates and ethnographically constructs the life worlds of variously situated objects, it also ethnographically constructs aspects of the system itself through the associations and connections it suggests among sites" (Marcus 1995: 96). In this way the multi-sited approach hooks into the state-centred focus on the macro-context. However, whereas the state-centred approach put the state at the centre of analysis, generally

ethnographic methodology is more inclined to ‘cultural formations’ and typically accounts for other societal levels than the state level.

Welfare and im/mobility: State of the art

The puzzle over welfare and im/mobility as problematised in this introduction draws on the juxtaposition of two research directions: the transnational turn within migration research and the territorial turn within social policy and welfare state research. The research questions focus on the tension between mobility and immobility with regard to welfare at the everyday and the policy level. This research focus imposes on the analyses a need to consider territorialities and to take analysis beyond the state as a taken-for-granted entity.

There is a relative lack of research considering welfare with regard to both mobility and immobility. There is also a relative lack of welfare research *combining* the multi-sited and state-centred approaches. Most of the literature at the migration and welfare state nexus tends to assume migrants as uprooted and states as taken-for-granted entities of inquiry. I shall argue that this deficit may be overcome by bringing the multi-sited and the state-centred approaches into the migration and welfare state research. Below I clarify how the transnational turn within migration research and the territorial turn within social policy research relate to welfare, and identify the research gap this dissertation seeks to contribute to.

Swedish migration and welfare state research is typically conducted not only in Sweden, but often also from a very *Swedish* standpoint. This may be understood against the backdrop of methodological nationalism as discussed above: nation-state influence on social science. Wittrock and Wagner (1996) have considered the divide between statist and non-statist societies for the structuration of the social sciences. Below, I rely on their discussion to put the identified research gap in a societal context. In addition, the understanding of the societal context has implications for the formulation of a transnational social question, which I attempt at the end of the third part.

Research on transnational and national welfare

There is a relative dearth of both theoretical and empirical considerations of the dynamics of transnational welfare and its linkage to national social policies. This may be understood against their different disciplinary origins. The transnational turn within migration research came about within anthropology for good reasons. International migration turns transnational only when social and symbolic ties are sustained across borders. This means that what distinguishes transnational migration from other forms of migration is its *relational* character. This is also why it is difficult to obtain quantitative large-scale measures of transnational migration. National data bases may capture mobility across borders, but hardly the character of it. In addition, mobility across state borders is not such a straightforward measure as may be anticipated in quantitative measures, but may occur in constant flux as proposed by transnationally inclined scholars. As described earlier, the transnational turn is part of a process in which anthropologists ‘followed’ their informants across borders, in this case to the United States. This is an important achievement. However, in general anthropologists do not appear to pay a lot of attention to issues of welfare. In addition, the ethnographic method – collecting dense ethnographic descriptions through, for instance, participatory observation among selected respondents – is not optimal for inquiries on the policy level, such as national social policies.

The territorial perspective, on the other hand, is represented by, among others, geographers and political scientists doing research on social policy and welfare state development. This means that political processes such as rescaling of governance and redistribution are a prominent research focus. This research can involve a focus on both the policy and everyday levels, but welfare at the everyday level is typically reduced to an economic measure. But above all, this means that pre-existent (state-regulated) levels of governance are under focus, excluding transnational ‘governance’ typically rooted in trans-local contexts across borders having influence on the everyday life of individual and collective transnational actors.

Thus, there is multi-sited research which considers transnational welfare in everyday life to a limited extent, but which in principle does not take account of social policy. And there is state-centred research which considers welfare at both the policy and everyday levels, but which is limited to fiscal levels and does not account for unanticipated scales of ‘governance’. That is, there are two veins of research with no link between

the two. This is the knowledge gap – or ‘missing link’ – that the dissertation seeks to contribute to filling.

The nation-state and its social sciences

The authors in *States, social knowledge, and the origins of modern social policy* (edited by Skocpol and Rueschemeyer 1996) take stock of the origins of social policies to explore the interrelations of states and social knowledge with a comparative historical institutionalist approach. A general argument in the book is that the formulation of the social question restructured the social sciences, and that this in turn shaped the perception of the social question and governmental responses. In this context, Wittrock and Wagner (1996) have contributed a chapter considering how state structures, knowledge discourses, and the formulation of the social question at the turn of the twentieth century set the agenda of both politics and knowledge production. Their main argument is "that the foundations of both the system of political institutions and its welfare policies and the system of scientific institutions and its rules for social science discourse, as they exist to present day, were laid in this period in the late nineteenth and early twentieth centuries" (Wittrock and Wagner 1996: 90). The transformations of the relations between state institutions and society on the one side, and the academically legitimated discourses on society on the other side, were interrelated and each had a major impact on the other; they evolved through cross-nationally significantly different discourses and institutional constellations. This means that national discourses of knowledge production were closely related to the national political structures and thereby both furthered and limited by these. The authors (1996: 105) maintain that the existence of consolidated state structures before modernisation processes such as democratisation and industrialisation makes a crucial difference between continental European and Anglo-American countries. Hence they make a distinction between statist and non-statist societies, where statist corresponds mostly to continental Europe, and non-statist mostly to the United States and the United Kingdom, and in the analysis they consider this division for the structuration of the social sciences.

The statist *vs.* non-statist divide serves to explain the differences, for instance, between the research-oriented university in the late nineteenth-century United States and the state-run German universities for which it was a constitutive task to provide training for administrators in a well-

developed national bureaucracy. This means that the differences reside in how statist *vs.* non-statist institutions relate differently to the state and the different ways through which they might have an impact on, or are themselves shaped by, state developments (Wittrock and Wagner 1996: 105-106). In addition, as state-run universities simultaneously advance scientific knowledge and teach this knowledge to practitioners as well as to the following generation of scholars, the statist way of doing so constitutes superb conditions for continuous reproduction of cognitive orientations as well as structural limits for cognitive change (Wittrock and Wagner 1996: 102-103).

It has been proposed that the dominant thinking of the state as an independent variable may be due to North American domination within research. Thereby, the stateless political history of the United States has made European research also 'stateless' in spite of a strong political history of states since medieval times (Rothstein 1992*b*: 24). It is then of interest to note that it is in the stateless North American context that the questioning of the state as a taken-for-granted entity of inquiry has its upsurge (cf. e.g. Skocpol et al. 1985). Besides, in the light of the above discussion, it is more conceivable that the management of the state as an independent variable is due to the fact that in Europe the universities have been state-run (in varying degrees). Of significance for this book is how this may be understood with regard to the Swedish case. In Sweden, not only have universities been state-run, but also much research has been controlled directly by the state.

In Sweden, the social sciences expanded simultaneously with the welfare state after the Second World War. Fridjonsdottir (1991: 254) has discussed how the development of the social sciences and the society interplayed at this time, and how this engendered a "self-image as social engineers at the service of society" among sociologists. Related to this self-image is how research was led. In Sweden, a substantial amount of research on welfare and mobility was commissioned by the state. For instance, Hammar (1994, 1999*b*, see also 1980; EIFO 1983) has pointed out that Swedish research on international migration and ethnic relations has been state-run until the beginning of the 1990s. As a consequence, migration has been de-politicised in the public debate and knowledge production tied to the state apparatus, steering migration studies towards *incorporation* instead of mobility across state borders. A similar pattern can be seen with regard to social policy research. Swedish state commissions

for investigation and Swedish official reports cannot be overlooked in reviews on knowledge production of welfare (Johansson 1992; Lundqvist 2007). In addition, while a significant amount of research was commissioned by the state, also the non-commissioned research bore the commission-based character. In sum, this means that nation-state-influenced research has influenced national social policies in a feedback process.

Looking back in time, the Swedish research milieu has not been very supportive of research engaged in transnational perspectives. As shown by Wittrock and Wagner, this can be seen in continental European countries as well, and the change in the early 1990s can for instance be seen in France too (Amiriaux and Simon 2007). Following Wittrock and Wagner's line of argumentation, it is plausible that this is due to a wider contextual change; however, to consider this in depth goes beyond the scope of my discussion. In spite of the statist context, some good research on transnational migration can be found, even if we go further back than the 1990s. For instance, the dissertations by Ulla-Britt Engelbrektsson in social anthropology and Aleksandra Ålund in sociology, both defended in 1978, involve multi-sited approaches that invite today's reader to think in terms of transnational ties and migration. In 2007, perhaps to some extent in the wake of the mentioned dissertations from 1978, two anthologies embracing the transnational perspective were being published in Sweden. The research milieu at the Department of Social Anthropology, Göteborg University (where Engelbrektsson holds a position), has produced an anthology on 'global families' (*Globala familjer*) edited by Marita Eastmond and Lisa Åkesson (2007), and the research milieu at the thematic Department of Ethnicity, Linköping University (where Ålund holds a position), has produced an anthology on 'transnational rooms' (*Transnationella rum*) edited by Erik Olsson et al. (2007). Two other research milieus worth mentioning are the Department of International Migration and Ethnic Relations at Malmö högskola, which among other things has produced the anthology *Transnational spaces. Disciplinary perspectives* edited by Maja Povrzanovic Frykman (2004), and International Migration and Ethnic Relations (CEIFO, Centrum för forskning om internationell migration och etniska relationer) at Stockholm University, which was established in 1984 under the direction by prominent migration scholar Tomas Hammar (see Hammar 1994: 26-28 for a thorough review of research milieus).

Welfare in a globalising context: The analytical approach

I now proceed to clarify my analytical approach. I start out with a clarification of the transnational and national frames, and of welfare. The transnational and national frames refer both to empirical frames of analysis and to theoretical understandings of these. The theoretical understandings of these are thoroughly dealt with in the analytical parts, and here I shall instead clarify the *geographical reach* of the transnational and national frames of analysis and discuss some implications of this. Next, I define welfare at the everyday level as the conduct of *child caring* and *parenting*, and at the policy level as policies influencing this conduct. After these conceptual clarifications, I go on to analytical considerations.

While in each of the three parts I elaborate rigorous theoretical frameworks for the specific analyses therein, here I concentrate on more general issues of how the concepts in the three parts are interrelated. I attempt a comparison of the transnational and the national frames of welfare at the everyday level and the policy level. This is a demanding task and two methodological problems immediately arise. The first, with regard to the transnational frame, is: Do borders matter? And the second with regard to the national is: Do social policies matter? The first question asks what would happen if there were no borders, and why international migration is different from internal. The second question asks whether other variables explain the national frame better than that of social policy, and how far social policies reach out (cf. Leisering 2003: 215; Daly 2000: 39). Below I discuss these issues as the spatial and the micro-macro linkages. In these discussions I introduce the central concepts used in the analytical parts. I aim at comparison of the transnational and national frames of welfare, and in the subsequent section I describe the three sequential steps of this comparative approach. I also introduce the methodological approaches taken in the respective parts as well as the empirical grounding of the analyses.

Trans/national frames of welfare as welfare regime types

The transnational and national frames are conceptualised as relying on welfare regime approaches. In the inquiry into whether transnational and national welfare diverge (first question), I let the national frame

correspond to the 'welfare *state* regime', and the transnational to a bridge between this and the 'informal security regime'. In the inquiry into how social policy manifests the nation-state (second question), I focus on the national frame as contextualised in the selected case of Sweden. It is important to note that the national frame is operated differently depending on the nature of the two questions. Four directions within the comparative welfare regime approach are sketched for the conceptualising of the transnational and national frames.

It is no exaggeration to claim that when Gøsta Esping-Andersen (1990) published *The three worlds of welfare capitalism*, he nurtured the comparative welfare regime approach as a whole. While Esping-Andersen set the frames for the first, the succeeding approaches can be said to have emerged as critiques of this. One introduces the impact of gender relations into the welfare regime approach, one re-thinks certain aspects of the welfare regime approach in the light of globalising processes, and the last position is the (OECD-centric) welfare regime approach within the global world order.

In his well-known study, Esping-Andersen (1990) takes stock of class coalitions and degrees of de-commodification, systems of stratification and state-market relations, with de-commodification standing out as the most important indicator. The comparative framework is limited to the OECD frame with an emphasis on north-western European countries, and the included countries are grouped into the *liberal*, *conservative*, and *social democratic* welfare regime types. A large amount of research has emerged as a reaction to this much celebrated and criticised publication. The comparative focus has, for instance, been extended to include southern European countries and the model to include the *Mediterranean* welfare regime type (e.g. Ferrera 1996). As a major criticism, attention has been drawn to the fact that the approach is bluntly gender-blind and fails to explain regime-type variation with respect to caring institutions and gendered patterns of labour market participation. Lewis (1992: 204) has phrased it thus: "women disappear from the analysis when they disappear from labour markets". The gendered welfare regime types approach has arisen as a response to this shortcoming of the former.

The gendered approach to welfare regime types really consists of a number of approaches which have in common that they take account of women's positioning in the distribution of welfare. Early on, Jane Lewis (1992) proposed a threefold model consisting of *strong*, *moderate* and *weak*

breadwinner welfare regime types. This results in a slightly different grouping of the countries than the liberal, conservative, and social democratic regime types mentioned above¹⁰. By and large, the gendered approach can be said to shift the focus from class (coalitions) in labour market regulation to gender (differences) in the institutionalisation of the family, and from de-commodification to de-familisation (as discussed by McLaughlin and Glendinning 1994; cf. Esping-Andersen 1999: 45-46). This means that while the welfare regime approach à la Esping-Andersen focuses on the labourer's positioning on the labour market and to what degree s/he is made independent (de-commodified) of this for her/his welfare, here the focus is on a woman's positioning within the family and to what degree she is made independent (de-familialised) of this for her welfare. Whereas these perspectives help to explain welfare variation in cross-national comparison, as a major deficit they are incapable of explaining change over time. In order to do this we must enter institutional thinking.

Processes of globalisation exert pressure on welfare institutions, as well as on the organisation of land and people into states and citizens overall. In the third welfare regime approach that I address here, the welfare state is understood as intrinsically interlinked with the nation-state. Welfare state responses to globalisation are understood as path-dependent processes shaped by the historical legacy of the nation-state, as well as responses to critical junctures or formative moments explaining institutional change. Moreno and McEwen (2005) have proposed a six-square typology consisting of *uni-national* and *pluri-national* state structure on the one side, and *union*, *unitary* and *decentralised/federal* state structure on the other, and in which the countries cluster into five groups¹¹ (since there is no fit with the uni-national – union state structure). This

¹⁰ In the Esping-Andersen (1990) welfare regime types, the liberal includes countries like the US and the UK; the conservative, countries like Germany; and the social democratic, the Scandinavian countries. In the Lewis (1992) welfare regime type, the strong breadwinner regime type includes countries like Ireland and the UK; the modified, countries like France; and the weak, countries like Sweden.

¹¹ The scheme consist of: *uni-national state – unitary structure* (Denmark, Finland, France, Norway, Sweden), *uni-national state – decentralised/federal structure* (Germany post-1949), *pluri-national states – unitary structure* (Spain dated 1458, UK dated 1707), *pluri-national states – union structure* (Belgium 1831, Italy 1870), *pluri-national states – decentralised/federal structure* (Canada, Belgium post-1994, Italy post-1948, Spain post-1978, UK post-1999) (Moreno and McEwen 2005: 13-17)

approach organises the countries differently than the Esping-Andersen and gendered approaches do; but more importantly, and as I will show later on (under the heading ‘Understanding Swedish institutions’), this perspective manages to explain similarities beyond and differences within the much-cited Esping-Andersen welfare regime. While the previous approaches focusing on labour market and the family tend to rely on a single viable variable such as de-commodification and de-familisation, here *territorial management* is brought to the fore. This means that both territorial and membership spaces are taken account of, making the analysis immensely multifaceted. Two strands of research can be singled out here, one dealing primarily with the territorial space and fiscal organisation focusing on the re-scaling of welfare provision, and the other dealing primarily with the membership space focusing on the inclusion and exclusion of (presumptive) members.

While these three welfare regime approaches definitely have different emphases, they do not necessarily stand in opposition to each other. They may even enrich one another. In the forthcoming discussions I draw on understandings of both social class and gender as well as inclusion/exclusion mechanisms interpreted in the light of territorial management. I refer to the operational logic of inclusion and exclusion as a general framework, and then examine how this logic treats different segments of the population. I do not, as is often done, primarily study the ‘deviant’ (for instance women or immigrants) and to what extent these are incorporated. Instead, I aim at a much more general approach focusing on the membership *per se*. While studies focusing on deviant cases tend to be restricted to mechanisms of *exclusion*, I am likewise interested in social cohesion and mechanisms of *inclusion*. In the forthcoming discussions, I focus on mechanisms of inclusion and consider how their operational logic has an excluding effect on certain segments of the population. This is why I have found territorial management (or the state-building perspective) a fruitful approach.

Until now I have dwelt upon variations within an OECD-centric frame. In my analyses I let the (wider) national frame correspond to the OECD frame. This means that the ‘Swedish frame’ may be viewed as a case study of this wider ‘national frame’. Yet whereas the analysis of the Swedish frame is a *case* study, due to the enlightening perspectives presented above it may be viewed as a comparatively informed case study.

Nonetheless, when in the forthcoming discussions I take account of mobility, I do not remain within this national frame. The transnational frame involves mobility permeating the national. I am therefore enjoined to ask how welfare may be approached in a wider context. Ian Gough and colleagues have lifted the analytical lens to the global order in search of a welfare regime approach that is consistent overall. Gough (2004) criticises de-commodification for being ill-suited in less developed countries and contexts, as it presumes a commodified labour market and a certain degree of welfare state capacity. He points out that many less developed countries and contexts were never disembedded in the Polanyian sense. Since disembedding following commodification never occurred, *de*-commodification proves inappropriate in these contexts. Gough and colleagues therefore propose that the Esping-Andersen welfare regime types should be grouped as welfare *state* regimes, and that two further groupings should be added: the *informal security regimes* (as discussed by Wood 2004) and the *insecurity regimes* (as discussed by Bevan 2004)¹², allowing developing and transitional countries into the discussion. While the welfare state regimes approach relies on a legitimate state and a pervasive and formal labour market in its conceptualisation of social policy and welfare distribution, none of the other two groups of welfare regimes do so. Hence, Gough and his colleagues argue for a more universal conception of social policy that does not exclusively focus upon the role of the state. This means that the dependent variable of social policy is contested. *Informal security regimes* refer to a set of conditions where people rely upon community and family relationships to meet their security needs. Relationships tend to be hierarchical and asymmetric, and the welfare outcome varies. Relations bear a patron-client character and can prove resistant to civil society pressures, but they also comprise a series of informal rights and afford some measure of informal security. *Insecurity regimes* refer to a set of conditions which generate gross insecurity and hinder the functioning of stable informal mechanisms to mitigate these.

The welfare state regime, the informal security regime and the insecurity regime are three broad and ideal-type groups of welfare regimes conceptualised at a high level of abstraction, and Gough (2004) continues

¹² Gough (2004), Wood (2004), and Bevan (2004) all appear as chapters in the same book: *Insecurity and welfare regimes in Asia, Africa and Latin America. Social policy in development contexts*.

his discussion by presenting a preliminary empirical classification across the developing and transitional world. He pursues a cluster analysis of welfare outcome and welfare mix¹³ which he synthesises into four welfare regime types: *actual or potential welfare state regimes*, *more effective informal security regimes*, *less effective informal security regimes*, and *externally dependent welfare regimes*. In academic debates, these four clusters are sometimes, together with the conservative, liberal, social democratic and Mediterranean welfare regime types, referred to as the ‘eight welfare regime types’.

Considering the question of how transnational and national welfare diverge, this discussion has conceptualised the national frame as a welfare *state* regime, and the transnational frame as a bridge between this and the informal security regime. Regarding the second question about how social policy manifests the nation-state, the discussion has put the Swedish case in perspective within the welfare *state* regime. The Swedish welfare state is embraced as a social democratic and a strong breadwinner welfare regime type, and Swedish social policies as both de-commodifying and de-familialising. In addition, the Swedish nation-state is typified as uni-national and unitary. All these characteristics are identified in relation to other welfare *states*. This positioning of the Swedish case within the welfare *state* regime enables a comparatively informed discussion of the Swedish case.

Welfare at the everyday and policy level

This study employs a non-economic and multi-dimensional conceptualisation of welfare, namely as *child caring* and *parenting*. At the everyday level I consider the conduct of child caring and parenting, and at the policy level the policies influencing this activity. By focusing on an activity and policies influencing this activity, I approach welfare in a non-normative way, which is necessary for any comparison of welfare as a normative concept. The conceptualisation of welfare as a normative concept varies across time, place and context, and at both the everyday

¹³ *Welfare outcome* is calculated from the following three main indicators: (i) computations of disability-adjusted life expectancy (DALE), (ii) adult illiteracy, and (iii) the World Bank measure on poverty gaps at \$2 a day (Gough 2004: 36-39). *Welfare mix* is calculated from (i) public spending, (ii) private spending, and (iii) international flows (Gough 2004: 39-43).

and the policy level. This means that in a comparison of the borders and boundaries of welfare within the transnational and national frame, a normative conceptualisation of welfare would turn into an evaluation of one frame against the other rather than a comparison of welfare as is the purpose of this book. Most often, welfare is either explicitly or implicitly conceptualised normatively. I shall highlight the normative approach implicit in de-commodification and de-familisation, and point out that these norms and values are not necessarily mirrored in political agendas. In addition, while political agendas vary in cross-national perspective, self-estimated welfare is surprisingly insensitive to contextual variation. Finally, I conceptualise child caring and parenting as basic needs possible to approach in a non-normative way.

In the Esping-Andersen approach, a higher degree of de-commodification is implicitly deemed favourable, and in the gendered approach a higher degree of de-familisation is likewise favourable. As a consequence, the Swedish welfare state is pointed out as favourable in both approaches. While these normative standpoints are prominent in the analytic frameworks, they are not mirrored in the political goals underpinning the different welfare state regime types. By contrast, the different welfare state regime types foster different caring ideals (e.g. Kremer 2005). The favouring of one regime type and one set of ideals has lately been contested (e.g. Orloff 2006, 2008), but above all, when the comparative frame extends beyond the welfare *state* regimes, it becomes really inappropriate to favour de-commodification and de-familisation whose conceptualisations are dependent on the welfare *state* which is limited to this specific regime type. Moreover, this fostering of ideals is not limited to the welfare state context. For instance, Bevans (2004: 99-100) shows in her discussion of alternatives to the welfare *state* regime that throughout the African continent (which is under focus in her discussion) there is a huge variation of ideals in household structures. This indicates that where state institutions do not foster ideals, other institutions do this fostering. In the forthcoming discussion I try to avoid statements about what is right and wrong or good and bad welfare. Instead I examine how welfare is resolved, on the one side within the transnational frame and on the other side within the national frame.

While the *conceptualisation of welfare* among individual and collective actors varies with the institutional framework (both across and within different welfare regimes as pointed out in the discussion above), *self-*

estimated well-being tends to be insensitive to contextual variation. Self-estimated well-being within Western populations falls within 75.0 ± 2.5 percent of the measurement scale maximum score (Cummins 1995). While the earliest interpretation of this distribution (proposed by Herbert Jeremy Goudings in 1954) argued that since happiness is valued in our (read United States) culture, people rate for themselves what is socially acceptable (Cummin 1995: 179-180), Cummins and Nistico (2002) have proposed that this is due to a positive cognitive bias. This suggests that it is a 'human survival strategy' to view self-estimated well-being as more or less OK. In addition to the positive cognitive bias, self-estimated well-being appears to be influenced by a 'cultural response bias' (Lau et al. 2005). Since self-estimated well-being is loaded with both a contextual (or cultural) bias and a (human survival) positive cognitive bias, it is unsatisfactory as a comparative measure of well-being (cf. Gough 2004: 16). I consider self-estimated well-being an important facet of human welfare, but in the forthcoming discussions on welfare in the everyday life among individual and collective actors I do not recognise this aspect of welfare due to the mentioned limitations. I consider how people organise welfare in their everyday life, but not how they feel about it (i.e. the have-want discrepancy).

The detachment from self-estimated well-being does not dispense with well-being as a meaningful concept overall. Gough and Doyal (1991, ref. in Gough 2004) have developed a model for comparison of (objective) well-being across cultures, nations and time. They distinguish between *needs* and *wants*, with reference to needs-goals that are believed to be universalisable *vs.* wants-goals that derive from an individual's preferences and cultural environment. Basic needs are identified as physical health and autonomy. Arguing that these "can be met in a multitude of different ways by an almost infinite variety of specific 'satisfiers'" (Gough 2004: 18), they identify characteristics of need satisfiers that contribute to improved physical health and autonomy everywhere. They label these *universal satisfier characteristics* or *intermediate needs* and group them into eleven categories¹⁴ (Gough 2004: 18). The universal satisfier characteristic (or

¹⁴ The eleven categories are: (i) adequate nutritional food and water, (ii) adequate protective housing, (iii) non-hazardous work environments, (iv) non-hazardous physical environments, (v) appropriate health care, (vi) security in childhood, (vii) significant primary relationships, (viii) physical security, (ix) economic security, (x) safe birth control

intermediate need) that this book deals with is *significant primary relations*. This is an important facet of well-being which in this book is discussed as *child caring* and *parenting* (alternatively *mothering* and *fathering*). Thus, I focus on the need of children for significant primary relations and how parents (and other adults) fulfil this need.

Above I have stated (with reference to Daly 2000) that in this book social policy is understood to be interlinked with the family in at least two ways: as an institution that carries out certain functions and as a set of social relations. I have also argued (with reference to Gough 2004) that when we consider social policies and welfare beyond the OECD context, we must re-conceptualise social policy to encapsulate more than merely state agency. Whereas child caring and parenting refer to relations, we can now, with reference to the discussions above, see that these may be well understood in relation to contextual (political) institutions. In the forthcoming discussions I consider how child care is institutionalised on the one hand with regard to the borders and boundaries of the transnational frame, and on the other hand with regard to the borders and boundaries of the national frame, and how we may understand the tension between these two operational logics.

The horizontal link: Territoriality and mobility

Do borders matter? I argue that borders matter in at least two senses. International migration involves not only physical movement across geographical markers, but also a movement across 'membership markers'. The *exit* from a geographical space does not automatically mean an exit from the membership space, and the *entry* to a geographical space does not automatically mean access to the membership space. In other words, the crossing of borders involves two interrelated yet differentiated crossings of what Rokkan (1999) terms *geographical* boundaries and *membership* boundaries. "The membership boundary tends to be much firmer than the geographical boundary: you can cross the border into a territory as a tourist, trader or casual labourer, but you will find it much more difficult to be accepted as a member of the core group claiming pre-eminent rights of control within the territory" (Rokkan 1999: 104). Recognising that international migration does not merely depend on the organisation of

and childbearing, and (xi) appropriate basic and cross-cultural education (Gough 2004: 18).

land and people into states and citizens, but also on what control states exert over geographical and membership boundaries, defines international migration as a political process involving the transfer of a person from one jurisdiction and membership to another (Zolberg 1981, 1999: 81). Geographical and membership boundaries surround *bounded spaces*. In an interpretation of Rokkan, Ferrera (2005a) has proposed that these arise through *bonding*, the creation of a *we-ness* among insiders, and *bounding*, the separation of territories with insiders and outsiders. This means two things: that processes of bonding function to *anchor* people within certain geographical and membership spaces, and that bounding functions to *hinder movement* from one jurisdiction and membership to another. Hence borders as geographical and membership boundaries matter in a bipolar process hindering movement and anchoring individual and collective everyday life within certain geographical and membership boundaries. The mechanisms of bonding and bounding are central for this understanding.

The territorial dimension of the nation-state may be more obvious than the territorial dimension of migration. Nation-states function to anchor individual and collective everyday life in conjunction with nation-state borders since welfare state programs have lock-in effects, for instance by way of national social insurance schemes (Ferrera 2005a). This may be translated into a nation-state *expectancy of relative immobility*. However, research from a transnational perspective highlights that individual and collective actors are not only relatively mobile, but also live their everyday life anchored within two or more nation-states. This anchoring is to be understood differently than the national anchoring. Here, social and symbolic ties function to anchor the everyday life of individual and collective actors within, and to bridge them between, two or more nation-states (Faist 2000a). This means that the national anchoring focuses on the relation *between* the state *and* individual and collective actors, and that the transnational anchoring focuses on relations *amongst* individual and collective actors.

Whereas *bridging* is central in the analysis of transnational social spaces and welfare strategies, *bonding* and *bounding* are central in the analysis of the nation-state and social policy. Bonding and bounding combine to generate *social solidarity* within nation-states – ‘internal bonding through external bounding’ (Ferrera 2005a: 4) – and social and symbolic ties across borders combine to generate *social capital* across two or more nation-

states¹⁵ (Faist 2000a: 102). Thus, social solidarity here refers to the bounded space of nation-states, and social capital to the bounded spaces of transnational social spaces. Whereas in each of the three parts I pay considerable attention to the conceptualisation of these concepts, here I present a figure to illustrate how they are interrelated.

In the search for an answer to the first question, how transnational and national welfare diverge, the analytical frame consists of the informal security regime, the welfare state regime, and the transnational social space between these two, as illustrated in the figure below. It is important to note that bonding and bounding are concepts generated from the welfare state context, and are not appropriate in the informal security regime. With regard to the second question, how social policy is constituted by and constitutive of the nation-state, I lift out and focus solely on the Swedish frame as an example of the welfare state regime frame.

Figure 1. Stylised model of the frames of analysis



This model admittedly suffers from a shortage in that one frame is left without analytical tools. However, for the purposes of the present study this shortage is of minor significance. This may be argued against the

¹⁵ Obviously, this conceptualisation of *bonding* and *bridging* is distinct from the well-known Putnamian conceptualisation (Putnam e.g. 2000, 2007). First, whereas Putnam applies the concepts in relation to social groups, here territoriality is under focus. Secondly, as a deficit Putnam conceptualises *social capital* as something tangible, whereas here it is understood as inherent in the structure of social relations (for a critique see e.g. Portes 1998b and Anthias 2007).

background that the first question considers the conduct or *doing* of welfare, ignoring the issue of why certain doings are done and not others, and that the second question – how social policy is constituted by and constitutive of the nation-state – is limited to a case study of Sweden. While I here leave the informal security regime frame without analytical tools, I return to the issue in the discussion of transnational welfare at the end of Part III.

The micro-macro link: The everyday and policy levels

Do social policies matter? I maintain that social policies matter in at least two senses. It is sometimes argued that welfare states act as channels of redistribution across different categories or groups in society (see for instance Daly 2000: 44). This line of argumentation is sometimes opposed by the view that welfare states do not primarily act as channels of redistribution across different groups, but across the individual life cycle. This means, as for instance Leisering (2003: 209) argues, that welfare state redistribution is horizontal rather than vertical, and that the aim is security rather than equality. This perspective may be valid when welfare state redistribution is reduced to an economic measure and to involve only extra-family redistribution. However, in the present book, child caring and parenting are under focus. This takes the analysis of welfare beyond economic restrictions and imposes an analytical focus on both extra- and intra-family relations.

With an extensive focus on gender relations, Daly (2000: 44) argues that welfare states redistribute key resources and opportunities across different categories affecting the distribution of inequality and poverty. Central to Daly's line of argumentation is that these processes are located both outside and inside the family. This means that welfare state redistribution sets off a dual process: one with regard to the family as an institution, and another with regard to the family as a set of social relations. The notions of the family as an institution and as a set of social relations are interrelated yet differentiated. The family as an institution refers to explicit and implicit welfare-state assumptions about what functions families execute, and the family as a set of social relations refers to how social relations within the family are configured with regard to these functions. Hence, national social policies are understood to be involved in the redistribution of inequality and resources in a complex way. This may happen more directly or indirectly, for instance through

family policies or labour market policies respectively. Obviously, this perspective has high relevance for the understanding of the gender division of (waged) labour market participation outside the family and (unwaged) caring activities within the family. Social policies matter in a bi-polar process defining the family as an institution expected to perform certain functions, and therein also defining what configurations of social relations within the family are appropriate.

Recognising that welfare state redistribution has effects on the distribution of inequality and resources defines the welfare state as a structuring agent having effects on the everyday life among individual and collective actors. This is why I have found the *institutional structuring of the life course* a relevant approach. *Structuring* refers to social policy as a structuring agent of child caring and parenting, and *structuration* to the performance of this policy among individual and collective actors. The structuring-structuration is not understood as a unidirectional force between the policy and everyday level; rather the policy level is understood to be both constituted by, and constitutive of, agency at the everyday level in a bi-directional process¹⁶. The shape and degree of the structuring-structuration depend on the institutional context, which in this book is considered in a state-building perspective.

For reasons already discussed, social policy matters only in the welfare *state* context. Hence, the concepts of structuring and structuration are inappropriate in the informal security regime as well as within transnational social spaces bridging the two. It is against this background that I have found it appropriate to approach transnational welfare in terms of *livelihood strategies*. Whereas strategies imply a focus on the actual *doing*, or performance, of welfare at the everyday level, structuration refers to the performance of welfare at the everyday level as understood in relation to the institutional structuring.

¹⁶ Clearly, while there are some similarities, this structuring-structuration frame has a much more limited scope than the well-known and very ambitious and complex Theory of Structuration as proposed by Giddens (1984).

Table 1. Level and frame of analysis

| LEVEL \ FRAME | TRANSNATIONAL FRAME | NATIONAL FRAME |
|----------------|---------------------|----------------|
| POLICY LEVEL | | STRUCTURING |
| EVERYDAY LEVEL | STRATEGIES | STRUCTURATION |

As illustrated in the table, the transnational frame is limited to the everyday level, whereas the national frame takes account of both the policy and the everyday level. The concepts of strategies and structuration account for both the performance of child caring and parenting in everyday life, and what configurations of social relations are connected with these performances. Structuring is limited to the welfare state context and accounts for welfare state involvement in welfare performance and relational configurations.

As in the stylised model of the frames of analysis (Figure 1), also here one space is left empty. Both of these empty spaces correspond to the macro level within the informal security regime. In this dissertation, the macro level of the informal security regime is not considered. As already discussed, the understanding of the welfare *state* as a structuring agent relies on an assumption about disembedding in a Polanyian sense, which may not be assumed in the informal security regime. However, and as also already discussed, this context involves other structuring agents (see Bevan 2004). I shall return to this issue in the discussion of transnational welfare at the end of the third part.

Transnational strategies and national structuring at crossroads: An introduction to the three sequential analysis

This dissertation considers three aspects of welfare and im/mobility. These three aspects are dealt with in a three-stepwise analysis that organises the book into three parts. Above I have described how the central analytical concepts are interrelated with regard to their horizontal and vertical reach.

In this section, I concentrate on the *sequential* appearance of these concepts in the analyses, as well as the empirical data they are related to and the methodological approach involved. Each of the three parts consists of a solid analytical framework, an empirically grounded analysis, and a discussion. Hence, I present *three* analytical frameworks, *three* analyses, and *three* discussions. As explained above, I have found this approach appropriate due to the nature of the puzzle – dealing with different ways of conceptualising, or even thinking about, welfare. The fact that the transnational and national frames of welfare involve different ways of thinking about welfare has empirical and methodological implications for the comparative approach taken here.

The empirically grounded analyses in this dissertation draw on secondary data, i.e. on literature reviews. Instead of new empirical findings, I present new perspectives on old findings. This means that the analyses draw on the richness of other scholars' work, but also that they are limited to these. It is important to recognise that migration scholars rooted within the transnational perspective and social policy scholars rooted within the territorial perspective prefer different methodological approaches as well as different kinds of empirical data. The analysis of the transnational frame involves a comprehension of welfare with a *multi-sided* approach, and the analysis of the national frame a comprehension of welfare with a *state-centred* approach. Thus, the transnational and national frames are connected with different empirical data not only in terms of their *spatial reach*, but also in terms of *kinds* of empirical data. These conditions have influenced the choice of a sequential outline of the comparative approach. Whereas the transnational and national frames of welfare are intersected with regard to concepts and methodologies, due to its different character I have not found it appropriate to intersect the body of empirical data.

In the three analytical parts, I present a considerable amount of empirical data of different kinds. I refer to quite a few concepts for organising this data into certain understandings of welfare at the everyday and policy level. From one point of view it may be argued that this amount of empirical data and concepts contributes to a richness in the analyses; from an opposite point of view it may be argued that it obscures the analyses. While working with this dissertation, I have striven to understand transnational and national welfare as two abstract and conflicting notions, as well as what the implications of these may be at the

everyday and the policy level. Understanding welfare from a transnational and territorial perspective, and the tension between the two, is a complex matter. I have worked under the influence of historical institutionalism, and I have not refrained from picturing transnational and national welfare as a complex matter comprising numerous variables.

All three parts relate to welfare at the everyday level, but since the transnational and territorial frames are congruent with different approaches to everyday life they do this in different ways. In the part on the transnational frame, I draw on the approach of *livelihoods* and identify four types of *transnational welfare strategies*. In the part on the national frame, I draw on the approach of the *institutional structuring of the life course* and consider the *national structuring of welfare* in the everyday life of the citizenry. Hence, in this part, I consider both the everyday level and the policy level. Finally, in the third part, I intersect the approaches of livelihoods and the institutional structuring of the life course in a discussion of *unexpected and expected biographies*. The empirically grounded section in this third part is organised to answer the two research questions, and I consider the *welfare mobility dilemma* as a tension between transnational strategies and national structuring, first at the everyday level and secondly at the policy level. Whereas I intersect the theoretical perspectives, I limit the empirically grounded analyses to inform each other. This means that while I combine the two ways of thinking about welfare, I do not combine the empirical cases illustrating these different understandings. Moreover, instead of counting too much on the empirical cases illustrating the welfare mobility dilemma, I draw on the dual understanding of welfare that takes both mobility and immobility into account, proposing two research directions using the appropriate concepts and methodologies.

The analysis of the transnational frame of welfare draws on multi-sited ethnographic research. I approach welfare strategies as framed by transnational livelihoods. In the theoretical discussion I consider the livelihoods approach, the transnational perspective, and how these may be combined in a way sensitive to hierarchies of power. The empirically grounded analysis in this part is based on a selective reading of research that indicates how child caring and parenting are done in transnational contexts. The referred publications do not necessarily have child caring or parenting in focus, but the thick ethnographic descriptions have allowed reinterpretations of the readings. This means that I see to the performance

of child caring and parenting in everyday life among transnational individual and collective actors. I create a typology consisting of four *transnational welfare strategies*. The typology is constructed from the variables of the degree of institutionalisation and type of bridging (i.e. type of social ties) across borders and boundaries (these are discussed thoroughly in the theoretical framework). This part is concluded with a discussion of welfare across borders and boundaries.

The analysis of the national frame draws on more diversified data than the previous part. The research referred to is state-centred, or has allowed interpretations from a state-centred approach. Sweden is under focus and I pay considerable attention to the Swedish institutional context. In the theoretical discussion I consider the institutional structuring of the life course from a territorial perspective. The empirically grounded analysis in this part consists of three sections. First, I picture the Swedish institutional context in a historical *longue durée* perspective drawing on perspectives developed by political scientist Stein Rokkan. I then consider the operational logic of the Swedish state, drawing on analysis presented by political scientist Bo Rothstein. I embroider Rothstein's empirical cases with dense historical descriptions presented by historians Yvonne Hirdman, Ylva Waldermarsson, and Jesper Johansson. This depicts the Swedish nation-state as a structuring agent. Third, drawing on qualitative understandings of the political process, I consider how this is mirrored at the everyday level by looking at quantitative data describing child caring and labour-marked participation in the Swedish context. Like the previous part, this part concludes with a discussion of welfare, but in this case as bordered and bounded.

In the third part, I consider the tension between transnational strategies and national structuring. I intersect the methodological approaches of livelihood and life course as well as the transnational and territorial perspectives in a discussion of integration and (societal) membership. In the empirical section, the multi-sited ethnographic data serve to answer the first question, and the empirical data related to the Swedish case study serve to answer the second question. At the everyday level, the dilemma consists of a tension between different operational logics of the family, and at the policy level it consists of universalist dominance over particularism and an assimilationist approach to multiculturalism. This part ends with a discussion of the transnational

social question and a proposition of how to proceed in welfare research with a dual focus on mobility and immobility.

Outline of the book

Beside this introduction and the conclusion at the end, the book consists of three parts. Each part is divided into (i) a discussion of the analytical framework applied therein, (ii) an empirically grounded discussion, and (iii) a discussion of welfare in relation to borders and boundaries. I shall now outline the content of these three parts.

Part I. Transnational social spaces and welfare strategies. Here I seek to combine the transnational perspective with the livelihood approach in a way sensitive to hierarchical power relations. I describe how the transnational perspective has developed and how it is understood from various disciplinary perspectives, as well as how I take advantage of it in my analyses. The empirical section draws on ethnographic and ethnographic-like research and identifies four transnational welfare strategies, which are organised into a typology drawing on the transnational perspective. Finally, welfare is discussed as crossing borders and boundaries with regard to the family as an institution and as a set of social relations. I show that as the notion of the family as an institution changes across borders, this influences the family as a set of social relations. Interestingly, these imposed changes of social relations appear to be accepted/resisted in varying degrees depending on whether they concern gender or intergenerational relations.

Part II. The nation-state and social policy. This part begins with a discussion focusing on the institutional structuring of the life-course approach and the territorial perspective. As with the transnational perspective, I first describe the development of the perspective and how it has been used elsewhere, and then proceed to elaborate my understanding of it and how I refer to it in my analyses. In addition, I discuss the already introduced notions of the family as an institution and as a set of social relations, and how these understandings inform the analyses. The empirical section focuses on the empirical case of Sweden, starting with a discussion of the Swedish institutional context in a very long historical perspective. I am interested in how the 'operational logic' of the Swedish type of corporatism can be understood from this perspective, as well as

how this translates to the functioning of the Swedish membership space and its 'gender and ethnic logic'. I consider the welfare structuration at the individual level by looking at the development of institutional child care and female labour-marked participation. Finally, I pursue a discussion of (Swedish) welfare as bordered and bounded.

Part III. National and transnational welfare at crossroads. This part begins with a discussion intersecting the livelihood and life-course approaches, and the transnational with the territorial perspective regarding their different understandings of integration and (societal) membership. The empirical section is titled *The welfare mobility dilemma* and is organised to answer the study's two main questions. Drawing primarily on the empirical analyses in the first part, I consider how transnational and national welfare diverge, and drawing primarily on the empirical analyses in the second part I consider how social policy is constituted by and constitutive of the nation-state. As the final step of the analyses in the dissertation, I engage in a tentative discussion of transnational welfare and propose how research may engage in the transnational social question.

The *conclusion* briefly summarises the approaches taken, the perspectives applied, and the major outcomes, and relates them to the discussions in this introduction.

Part I

Transnational social spaces and welfare strategies

Migration plays an important role in contemporary processes of societal transformation. It is stimulated by and stimulates further changes in migrant sending and receiving contexts. Migration leads to greater diversity within nation-states, and its impacts are felt on all societal levels and in all societal domains. This fuels the transformation of welfare state borders and boundaries and has immediate implications for national social policies. In this part, I consider transnational social spaces and strategies for welfare safeguarding among individual and collective actors living their everyday life anchored in two or more nation-states. I draw on the transnational turn within migration research, and I pay special attention to the identification of welfare strategies as they play out in individual and collective transnational livelihoods. In describing these, I show which strategies concern border and boundary crossing, and which are specific by social class and gender.

I begin with a theoretical discussion of livelihoods in transnational perspective, developing the concept of livelihoods in relation to transnational social spaces and social spaces of hierarchical power relations. Next, I present a typology of transnational welfare strategies including (i) engagement of close female kin, (ii) multi-sited families, (iii) engagement of informal labour, and (iv) religious institutions. The typology relies on two variables drawn from the transnational perspective. The empirical examples illustrating the four welfare strategies are generated through a reinterpretation of empirical insights within the literature on transnational migration relying (primarily) on multi-sited ethnographic data. The analysis is finalised with a discussion of welfare across borders and boundaries focusing on the family as an institution and as a set of social relations in transnational contexts.

Livelihoods in transnational perspective

The *livelihoods* approach is an actor-centred approach focusing on individual and collective capabilities and strategies at the everyday level. In combination with the *transnational* perspective, the livelihoods approach enables an analysis of welfare strategies as performed among individual and collective transnational actors within and beyond welfare state borders and boundaries. Different conceptualisations of ‘transnationalism’ are considered in part as a sequential development and in part due to different disciplinary standpoints. I position myself with regard to both sequential developments and disciplinary perspectives as well as clarifying my understanding of the concept. Transnational social spaces operate under the influence of power hierarchies, and the theoretical framework is elaborated to account for hierarchical power relations. In this way, the analysis of transnational welfare strategies is made capable of an analysis sensitive to gender and social class.

The livelihoods approach

‘Livelihood’ applies to a methodological approach that can be traced back to advances in the understanding of famines and food insecurity in the 1980s (Ellis 2002). Ellis (2001) points out that it has its origins in two separate sets of literature: partly in literature concerned with the differential capability of rural families to cope with crises such as droughts, floods, or plant and animal pests and diseases, and partly in ecological literature concerned with the sustainability of ecosystems or agro-ecological systems. The first set of literature links the livelihoods approach to the concept of *vulnerability* which contains the dual aspect of external threats to livelihood security due to risk factors such as climate, markets, or sudden disaster, and of internal coping capability determined by assets, food stores, support from kin or community, or government safety net policies. Central to the second set of literature is the concept of *sustainability*, which somehow refers to a system’s ability to cope with disturbances. Since the mid-1990s the livelihoods approach has gained terrain and it has been adopted within a wide range of institutions such as governmental and non-governmental development agencies at the local, national and supranational levels, as well as within academic institutions

(for a comprehensive review of this, see Hussein 2002; also Ashley and Carney 1999: 5-6).

One research and policy field where the livelihoods approach has been perceived as useful is migration, in particular with regard to refugees. The Refugee Livelihoods Project launched by the UNHCR's Evaluation and Policy Analysis Unit (EPAU) in May 2003 is an example of how the approach has entered the discourse on refugees and refugee assistance. Focusing on the world's least developed countries, this has led to refugee livelihood case studies in Ecuador, Ukraine, and a number of African countries (Conway 2004). Another example of the increased interest in the livelihoods approach within the field of migration is the *Forced Migration Review* (2004: 20) special issue on livelihoods.

Needless to say, among researchers and organisations/agencies a number of definitions of livelihood are found. Nonetheless, in one way or another it is an actor-centred approach that focuses on people's capabilities and strategies in their everyday life. An early and still much cited definition of livelihood is formulated by Chambers and Conway (1991). They state that a "livelihood comprises people, their capabilities and their means of living, including food, income and assets. Tangible assets are resources and stores, and intangible are claims and access". The authors have their roots within the field of rural development and continue by stating that a "livelihood is environmentally sustainable when it maintains or enhances the local and global assets on which livelihoods depend, and has net beneficial effects on other livelihoods. A livelihood is socially sustainable which can cope with and recover from stress and shocks, and provide for future generations". Ellis (2000: 10) has provided a later and also much cited definition stating that a "livelihood comprises the assets (natural, physical, human, financial and social capital), the activities, and the access to these (mediated by institutions and social relations) that together determine the living gained by the individual or household". Clearly, the meaning of asset has shifted between these two definitions. While the earlier definition tends to emphasise solely material assets, the later is more inclusive in counting human and social capitals as important assets determining livelihoods. In line with Ellis' definition, Baumgartner and Högger (2004) have argued that livelihood systems are more than sets of material and economic conditions. Developing a specific model for the livelihoods approach (*the rural livelihoods system mandala*), they push the argument further, saying that a livelihood system embraces all elements

that provide material continuity and cultural meaning to the life of a family or a community. When I refer to a livelihood, I do so in this broader sense. That is, in the analyses pursued below a livelihood consists of all the elements that provide material continuity or enhancement, and cultural meaning in the everyday life of people. Approaching livelihoods in this broader sense is both compatible and beneficial when combined with the transnational perspective. I develop this argument in more depth in the discussion on transnational livelihoods below.

The adoption of the livelihoods approach within migration studies implies a move away from macro-level structures and the understanding of migrants, in particular of refugees, as helpless victims of circumstances dependent on the charity of others (Conway 2004). Further, when a broader definition is adopted and in particular when human and social kinds of capital are added as assets determining livelihoods, the move away from the micro-level economist's approach to migration is opened up. This argument is dealt with further in the discussion on transnational bridging below.

After this short introduction mentioning some aspects of the empirical and disciplinary origins, institutional contexts, and substantial definitions of the livelihoods approach, I continue by focusing on the transnational perspective.

Transnational perspectives on migration

Migration is a highly differentiated social phenomenon and, as already discussed in the introduction, it is a matter of dispute whether transnational migration is a phenomenon qualitatively different from previous migratory flows. Here I leave this debate aside, and focus on the transnational turn within migration research as a paradigmatic shift. The concept of transnationalism is used and theorised in varied and often inconsistent ways, but what unifies the somewhat disparate 'transnational turn' are two things: firstly a pleading for multi-sited approaches, and secondly a concern with the wider (macro) context in both the place of origin and destination. This means that as a major acclaim it has brought migration studies beyond 'methodological nationalism'. This has several implications, one of the more important being that it alters earlier understandings of integration. Whereas integration conventionally is conceived as incorporation and loyalty towards a single state, the

transnational perspective opens up for understandings of integration across borders – incorporation into and loyalty towards two or more states.

The transnational understanding of migration, as migration studies in general, is usually depicted as interdisciplinary in character. This means that it is not a discipline in itself, but rather a research focus that is found within several disciplines. However, since most migration scholars tend to theorise along the disciplinary logics prevalent within the discipline from which they originate, it may be argued that in terms of theorisation, *multidisciplinary* depicts migration studies better than *interdisciplinary*. This suggests that there is a range of types of conceptualisations of transnationalism. For the conceptualisation of ‘transnational livelihoods’, I find it important to sort out what it is that makes a certain livelihood transnational. This brings about a search for theories of the middle range¹⁷ of transnationalism; empirically grounded explanations on an abstracted level applicable across time and space, excluding grand theorising as well as empirical descriptions of transnationalism. In the following I first take stock of the sequential development of the conceptualisation and theorisation of transnationalism, and then how this may be understood with regard to disciplinary discrepancies.

Peter Kivisto (2001) has made a sequential description of the development of research on transnational migration. In this he identifies three versions of the concept of transnationalism: the earliest articulation by anthropologists Nina Glick Schiller, Linda Basch, and Cristina Szanton Blanc¹⁸, the refinement of the term by sociologist Alejandro Portes¹⁹, and the most rigorous theoretical articulation of the term by political scientist Thomas Faist²⁰. Obviously, this sequential description does not present a full coverage of the conceptualisation and theorisation within the field; rather it is limited to some central advances of the transnational perspective. Kivisto’s account describes the development of the transnational perspective as a development from an empirical puzzle towards theoretical articulations. Such a development is not surprising, but indeed expected.

¹⁷ See Merton (1968) for a discussion of middle-range theory.

¹⁸ Referring to Glick Schiller et al. 1992, 1995, Basch et al. 1994, Glick Schiller 1997.

¹⁹ Referring to Portes 1996*a*, 1996*b*, 1997, 1998*a*, 1999, Portes et al. 1999.

²⁰ Referring to Faist 1998, 2000*a*, 2000*b*, 2001.

The sequential development depicted by Kivisto coincides with disciplinary leaps from cultural anthropology to (economic) sociology, and then to political science. Whereas anthropologists and economic sociologists both tend to collect 'ethnographic-like' data and present empirical descriptions/quantifications in their analyses, political scientists are typically more inclined to theory modelling. Obviously, migration scholars from different disciplines make use of different analytical strategies. With the purpose of encouraging 'interdisciplinary conversations', Morawska (2003) has described such taken-for-granted epistemological presuppositions within four disciplinary fields: anthropology, political science, sociology and history. She first clarifies what the major concerns of each discipline are (Morawska 2003: 613-622), and then continues with a discussion of modes of analysis and explanatory strategies resolving the concerns (Morawska 2003: 622-625).

Within anthropology the *concern* is with local societies conceptualised holistically at multiple and interrelated phenomenal levels that are constituted by meaningful actors through everyday interactions. In contrast to the actors-in-their-(trans)local-environments focus, the primary concern of political scientists is the operation of institutional structures. In particular two issues have been under focus: control of exit and entry, and the integration of immigrants understood in terms of citizenship and political participation. In the field of sociology, research on immigrant transnationalism has pluralised the dominant concerns with the ways in which societal structures pattern international migration, and the incorporation of immigrants and their children into mainstream society. Finally, the primary concern of historical scholarship has been the reconstruction of processes describing how societal formations, events, personae, or groups in changing economic, political and cultural contexts have come about.

The methodological *approach* distinctive to anthropology, Morawska argues, is comparative analysis, and the construction of typologies as a way to theorise similarities and differences in the functionings of communities. The analytical strategy of historians is the narrative of the particular. This means that *why* social phenomena come into being, change, or persist, is explained by showing *how* they do it. While political science is general-theory-oriented, the disciplines of history and anthropology do not aim to construct general theoretical models. Sociological studies tend to use transnationalism as a 'guiding concept' or, like anthropologists, substitute

typologies of immigrant engagement for the analytical models. Understanding that each discipline has an analytical strategy of its own, Kivisto's sequential description is not so much a development over *time*, as leaps between *disciplines*. What makes Faist's theoretical account exceptional is its *inter-disciplinary* approach, or as Morawska (2003: 618) puts it, "his 'translations' into the political science research agenda of other-disciplinary concerns have been unusually well informed by the concepts and approaches of other fields of investigation". How this is done is the topic of the following section.

Transnational bridging: Social and symbolic ties

In general, migration theorists do not address the question of immobility. Sutcliffe (2001) has argued that social scientists produce theories of migration because it is seen as an exceptional act in need of explanation, and McDowell and de Haan (1997; see also de Haan 2000) have referred to it as the 'the western discourse'. Obviously, this 'western discourse' is rooted in the Westphalian conceptualisation of territoriality discussed in the introduction. That is, while territorial borders and territorially based membership are viewed as 'natural' and indeed expected, migration is viewed as 'unnatural' and in need of explanation. However, in his book *Transnational social spaces and international migration* Faist (2000a) adopts a different approach. Instead of taking ongoing migration as the starting point of inquiry, he takes one step backward and asks why there are so many migrants out of few places, and so few out of most places. This approach proves to be very useful since it incorporates not only the variable of mobility but also that of immobility, and as a consequence the theoretical framework becomes more general and less context-bound.

Faist does not theorise on migration as such; instead he introduces the concept of *transnational social spaces* and explains migration that occurs within these. Transnational social spaces "consist of combinations of sustained social and symbolic ties, their contents, positions in networks and organisations, and networks of organisations that can be found in multiple states" (Faist 2000a: 199-200). Hence, in this understanding it is social and symbolic ties that explain transnationalism. *Social ties* consist of a continuing series of interpersonal transactions to which participants attach shared interests, obligations, expectations, and norms. *Symbolic ties* are not necessarily a continuing series of transactions. These are instead based on presumed commonalities and can be mobilised even in the

absence of earlier direct contact (Faist 2000a: 101-102). Furthermore, social and symbolic ties between actors carry important sets of resources that can be called *social capital*, which Faist (2000a: 102) defines as "those resources that help people to achieve their goals in ties and the assets inherent in patterned social and symbolic ties that allow actors to cooperate in networks and organisations, serving as a mechanism to integrate groups and symbolic communities".

Taking the explanatory factor of social and symbolic ties as the point of departure, and focusing on the density of ties and linkages, Faist (2000a) identifies three forms of transnational social spaces: transnational kinship groups, transnational circuits, and transnational communities. Moreover, he differentiates between three forms of transnationalisation: economic, political, and cultural (Faist 2000a: 213-237). The main resource in ties in *kinship groups* is *reciprocity* and can be seen, for example, in remitters sending back money to the kinship group in the country of origin. Continued obligations and reciprocal relations that result in return migration are most easily observed in kinship systems, particularly in families. *Transnational circuits* are characterised by a constant circulation of goods, people, and information crossing the borders of sending and receiving states, along the principle of exchange, or *instrumental reciprocity*. And *transnational communities* characterise situations in which international movers and stayers are connected by dense and strong social and symbolic ties over time and across space to patterns of networks and circuits in two countries. For transnational communities to emerge, solidarity has to reach beyond narrow kinship systems. According to Faist, such communities without propinquity do not necessarily require individual persons living in two worlds simultaneously or between cultures in a total 'global village' of de-territorialised social space. What is required, however, is that communities without propinquity link through exchange, reciprocity, and solidarity to achieve a high degree of *social cohesion*, and a common repertoire of symbolic and collective representations.

In his theorisation on transnational social spaces and international migration, Faist (2000a: 30-59) outlines three stylised levels for migration analyses: *micro*: the individual decision-making level, *meso*: people within the web and content of ties on the intermediate level, and *macro*: the highly aggregated and broader structural level. These levels can be compared with the three generations of migration theories discussed in the introductory chapter: The micro-level corresponds to economic migration

theories, the macro-level to migration system theories, and the meso-level to transnational migration theories.

Existing micro-theoretical approaches view either individuals or households as homogeneous decision-makers. This is true for rational choice approaches and for social psychological stress-awareness concepts. Yet empirical research has demonstrated that decision-making within kinship systems, such as families and in households, does not necessarily represent homogeneous interests or desires (see e.g. Pessar 1999*a*). The ethnographic research referred to below underscores this statement. However, such a deficit, Faist argues, can be addressed when employing a decidedly relational perspective. This is a perspective that is congruent with the notion of the family as a relational area, as discussed in the introduction (with reference to Daly 2000).

Macro-level, migration systems theories emphasise the linkages between emigration and immigration countries, using network analysis to address migration dynamics. The configuration of relations at the upper structural levels (international and global) set the limits of the possible and the impossible within which people stay and move. However, Faist points out, it is at a level of the more proximate surroundings that people evaluate their situation, define purposes, and undertake actions. This means that whereas network elements help to explain the dynamics of migration once it has taken off, they are not helpful for the understanding of relative immobility, the formation of migrant networks, and the kind of resources that make up these webs of transactions. In order to overcome this shortcoming, we must account for resources inherent in social and symbolic ties. The focus then shifts to issues such as exchange of information and goods, obligations, reciprocity, and solidarity among actors.

In Faist's view a *relational analysis* obviates the rigid micro-macro distinctions because it focuses more on the form and content of the relationship, and less on the properties or attributes of the actors or positions. The social and symbolic ties of the movers and stayers vary on the meso-level with respect to their structure, such as density and strength and their content. The emphasis clearly is on the ties people maintain with others. Migrants use resources inherent in these ties, such as various dimensions of social capital, exchange-based obligations, the norm of reciprocity and solidarity, and benefits derived from them, such as access to the resources of others, information, and control. The ties may reach to

the immigration or the emigration countries or to both at the same time. This means that as the relational analysis does not rigidly exclude the micro-level economist approaches as false or invalid, if these ties are systematically patterned in networks and collectives, it links the relational to the macro-structural level.

In her search for interdisciplinary translations, Morawska (2003: 623) has pointed out that Faist's operation of a multilevel theoretical model of international migration, global and state national politics, and immigrant transnationalism can serve as a basis for such interdisciplinary discussion of different explanatory strategies applied in transnational migration studies. That is, Faist's call for analysis on a meso-level does not alter the understandings of processes on the micro- and macro-levels. This theoretical openness is important in an interdisciplinary account such as the analyses conducted here.

However, for the usefulness of the perspective in the analyses below, structures of power in general, and of gender in particular, must be taken into account. And as Morawska (2003: 618) in a critical voice has pointed out: "Faist replicates his discipline's striking unawareness of the significance of gender relations".

Social spaces of hierarchical relations

In my search for welfare strategies, social class and gender proved to be of significance for the understanding of individual and collective strategies. These are features organised into hierarchies. Several migration scholars have paid attention to this and argued that, for the comprehension of migration processes, analyses need to be sensitive to power structures (see e.g. Pessar 1999*a* and 1999*b* for reviews). This venue of migration research has stemmed from empirical puzzles recognising that women and men experience migration differently, and in consequence attempts to *gender* migration studies have followed. This means that the majority of the theoretical accounts within this venue focus on gender as the organising principle of hierarchies. However, when giving prominence to structures of power in general, treating gender as one out of several organising principles within power structures should not be controversial. In fact, most theoretical accounts, though focusing on gender, also underscore the validity of intersectional analyses. I attempt to relate the notion of transnational social spaces to some aspects of hierarchical

structures of power. Due to the biased research focus in this field, gender is emphasised in the discussion.

Bringing structures of power into migration studies opens up for questions about how and why men and women (or rich and poor, etc.) experience migration differently. This must not be understood as questions about women's and men's (or rich and poor people's) experiences of migration. Such an approach would bind us to micro-level descriptions, and disable us in understanding the migration process as structured by power hierarchies (see e.g. Pessar 1999*b*; Pessar and Mahler 2003: 813-815 for a critique of understanding gender as variables of sex).

In the transnational perspective, ties are understood to be linked to the macro-structural level through a systematic patterning of ties into networks and collectives. Here this patterning is understood to occur along dimensions of social class and gender. This means that agency systematised along the variables of social class and gender both reflects and reproduces hierarchical relations at a more abstract macro-structural level. In other words, individual and collective agency is both constituted by and constitutive of unequal power relations, while unequal power relations are both constituted by and constitutive of this agency in a constant flux (cf. Hondagneu-Sotelo and Messner 1994). Of interest to us here is how these structures of power can be understood as organising elements in the formation of social and symbolic ties, and in particular of social capital which is the integrated form of the two. Discussing this, I draw on some aspects of the 'gendered geographies of power' which is a theoretical framework developed by Pessar and Mahler (2001, 2003). I advance their framework in the direction towards a relational analysis.

In the framework of *gendered geographies of power*, geographic scales, social locations, and power geometries are central concepts. *Geographic scales* are employed to capture how (social class and) gender operates simultaneously on multiple scales across transnational terrains. Scales may be the body, the family or the state. *Social locations* refer to a person's positions within interconnected power hierarchies of social class, gender and ethnicity. These locations tend to shift over time. Relying on Doreen Massey's (1994: 149) concept of *power geometries*, Pessar and Mahler (2003) directs attention to the types and degrees of agency people exert, given their social locations. In Pessar's and Mahler's (2003: 817) interpretation, Massey contributes to the understanding, not only of how people's social locations influence access to resources and mobility across

transnational spaces, but also of their agency as initiators, refiners and transformers of these locations. In this way, individuals are accounted for both as structured and structuring agents.

To the central concepts of geographic scales, social locations and power geometries, Pessar and Mahler add two dimensions. First, they view agency as affected by quintessentially *individual characteristics*, such as initiative. Their argument is that two people may hail from equally (dis)advantageous social locations, but one – owing to her/his own resourcefulness – will exert more influence than the other. Second, they argue that social agency must include the role of *cognitive processes*, which they understand as being both imagination and more substantial agency. They argue that much of what people do transnationally is foregrounded by imagination, as well as substantial agency, and that these are factors that should be valued into people's agency. In addition, they state that social imagination or 'mindwork' is still largely ignored within transnational migration frameworks. This they understand as due to difficulties inherent in measuring cognitive agency.

The theoretical framework has advantages vis-à-vis relational analyses of migration in transnational perspective. The concept of social locations refers to positions within interconnected power hierarchies of social class and gender, and – somewhat widened – the concept of geographical scales captures the view that power operates simultaneously at multiple scales (such as the body, the family or the state) across transnational terrains. This means that power may be structured differently within, for instance, the state and the family. Having this pointed out, and in order not to lose control of, what we are studying I find it justified to bring in the levelling of abstractions discussed above. We are attempting a relational analysis, and we must not mix up the processes at the meso-level with the ones at the micro- and macro-levels. In my interpretation, this means that to the extent that macro-level structures become integral parts of meso-level processes, conquering structures of two states can be understood to cause conflicts within, for instance, the family. Or put differently, the positioning of a certain set of individual characteristics can vary between scales, and the position at the meso-level is negotiated by and among individuals and always in relation to the micro- and macro-level across transnational terrains.

However, I am inclined to disapprove of the inclusion of individual characteristics such as initiative, and individual cognitive processes, into an

analysis of power structures. In my view, approaching power structures by focusing on individual characteristics means approaching something relational by focusing on individuals instead of the relations between individuals. This is an unfruitful approach deemed to fail. In fact, methodologically they are replicating what they themselves have criticised when they argue that gender is not merely variables of sex. Moreover, inherent in their line of argument is a notion of power as something we either possess or do not possess: you either have the initiative or you do not. Possessions we can usually carry with us. However, the 'possession of power' in the sending context is usually not easily transferred to the receiving context and vice versa. In a review on the origins and applications of social capital, Portes (1998*b*) point out the notion of social capital as something intangible: "Whereas economic capital is in people's bank accounts and human capital is inside their heads, social capital inheres in the structure of their relationships" (Portes 1998*b*: 3). This implies, as has been mentioned above, that social capital exists in relations to others and that it cannot be possessed. In this book, structures of power are understood to organise the form and content of social capital. That is, structures of power are mediated in and through our bodies and organise our social and symbolic ties to others: they form the emergence and reproduction of social capital. In turn, social capital is understood to structure and reinforce structures of power. This means that to the single-sided focus on the positive end of social capital, consisting of trust and inclusion, we add a negative end consisting of mistrust and exclusion. We examine how both trust and mistrust are organised in systemised ways with variables of (for example) social class and gender. In the typology presented below, I discuss how transnational actors mediate differently at different scales with regard to their locations of social class and gender. For the individual outcome, social capital, human capital and economic capital are understood to interplay in an intangible way. In Faist's understanding, processes in transnational social spaces involve the accumulation, use, and effects of various sorts of capital, their volume and convertibility. Moreover, resources of economic, human, and social capital are inherent in or transmitted through social and symbolic ties. As the final step of this theoretical discussion, I shall link the livelihoods approach with the transnational perspective.

Transnational (individual and collective) livelihoods

Livelihoods turn transnational when the strategies for maintenance of them involves the accumulation, use, and effect of various sorts of capital inherent in social and symbolic ties anchored in two or more nation-states. The identification of transnational welfare strategies do not necessarily rely on individual movements across borders, but rather that the strategies for the maintenance of livelihood welfare are anchored in two or more nation-states. Whereas the livelihoods approach is actor-centred, focusing on individual and collective strategies at the everyday level, as discussed here the transnational perspective positions it in relation to micro-, meso- and macro-levels of analysis. This opens up for ‘overlapping’ in two distinct ways: vertically and horizontally. Empirically it involves data collection across different societal levels as well as across nation-states borders. This corresponds to the multi-sited approach as discussed in the introduction, which involves both the extension of field sites and the macro-context. Theoretically this involves interpretations across levels of abstractions as well as across borders – interpretations with regard to different social locations as well as different geographical scales.

Transnational welfare strategies

I have identified four types of transnational welfare strategies and organised them into a typology. The strategies are not necessarily strategic in nature, but may for instance be habitual, or improvised. This implies that whereas pre-migratory livelihood strategies may remain influential, they are not decisive for the ones adopted and added in new host societies (see e.g. Al-Sharmani 2004: 17-18). I address the strategies as engagement of female kin, multi-sited families, engagement of informal labour, and religious institutions.

The welfare strategies have been generated through the reading and reinterpretation of ethnographic (or ethnographic-like) migration research. Hence, the *descriptions* of the four strategies are ethnographic-like, relying on empirical examples drawn from the literature. These descriptions have been *theorised* through the organisation of them into a typology drawing on Faist’s theoretical framework. In the following, I first make some general comments on the cited literature and on how migratory contexts may influence the evolution of transnational social spaces and welfare

strategies. I then present the typology and its organising variables. Finally, I illustrate the transnational welfare strategies with empirical examples from the literature. The empirical examples given describe not only the conduct of welfare, but also how the conduct of child caring and parenting is related to the family as both an institution and a set of relations. In the discussion in the third section on 'Welfare crossing borders and boundaries' I develop this interrelation.

Some remarks on the cited literature

In the analysis below I have searched for significant and enduring strategies that reflect how welfare is safeguarded within transnational livelihoods. Welfare is defined as child caring and parenting. The cited literature has been included according to three criteria. First, I have considered the individuals (informants/respondents) informing the studies to maintain a transnational livelihood. This does not necessarily mean that the authors in their analyses have depicted their informants as transnationals. In fact, in many cases, in particular when the research was conducted before the transnational turn in migration research, this purely reflects my understanding of the processes studied.

Second, the included research provides information about how welfare is safeguarded. This does not mean that the publications may be characterised as welfare or care research. The research included is better pictured as ethnographic migration research describing how groups or individuals live their lives, touching upon issues of child caring and parenting in a significant way. In some of the included research, the welfare aspect is a rather marginal feature that I have lifted out of a broader context which remains invisible in this context.

However, not all research reports or writings allow for reinterpretations, and the third criterion that the included research has fulfilled is that they have allowed this. The included literature is dominated by thick ethnographic and ethnographic-like descriptions that present us with information on how welfare is safeguarded, though this is rarely the focal point of the text. Hence, the cited authors are dominated by social anthropologists and ethnographically inclined sociologists, as well as for instance economic sociologists.

These three criteria do not permit a systematic search of literature, and the included literature does not claim to present a systematic literature review of welfare strategies. By contrast, the identified welfare strategies

have emerged from a selective search of literature that has been read in a selective way.

There has been no straightforward way to find literature providing information about welfare safeguarding within transnational livelihoods. Instead, the references have been found through selective searches according to the three mentioned criteria. In general, one reference has led to other references, either directly through the list of references or through searches on authors included in the list of references. I have also searched relevant university home pages²¹, as well as selected periodicals²², centre formations²³, conferences etc. In order to obtain empirical data of relevance for an analysis of transnational welfare strategies, I have devoted much energy to gaining an overview of the field by way of a criss-cross search of literature. The different types of welfare strategies are claimed to have reached a certain level of saturation. The strategy denoted 'religious institutions' is the least saturated strategy, yet it is empirically grounded and valid in the typology. This analysis was conducted in 2004 and the typology relies on publications until that year. I present the referred publications in more detail currently as I bring them up.

Dense ethnographic descriptions are typically holistic, describing phenomena in all their complexity. In my selective reading of these I have searched for transnational welfare strategies. The fact that I rely on dense ethnographic descriptions has implications for how I present the welfare strategies below. I have not found it fruitful to transform the ethnographic character of the data. Hence, whereas the empirical examples taken up are organised into four welfare types, they are illustrative in the ethnographic way. Moreover, I have systematised ethnographic research data using other perspectives and terminologies than those originally applied. This implies that the weighting of the study objects as they appear here may be skewed in relation to how they were presented originally.

Context and timing are important features for the emergence and organisation of transnational social spaces and welfare strategies therein. Hence it is a deficit that the typology is both time- and context-blind. The

²¹ Instances are for instance the home pages of the Universities of Oxford, California, Princeton, and Sussex.

²² E.g., *International Migration Review*, *Ethnic and Racial Studies*, and *Gender & Society*.

²³ E.g., the Centre on Migration, Citizenship and Development (Bielefeld), the Sussex Centre for Migration Research (Brighton), and the Transnational Communities Programme (Oxford).

time-blindness may have implications for our understanding of, for instance, gender relations. While a number of references were published in the 1980s, it is plausible that gender relations have changed since then. With regard to context, the cited research focuses mainly on migration flows from Latin America and the Caribbean to North America, from South-east and East Asia to North America, and from former Yugoslavia to the UK. The dominant focus on North America owes to several reasons. Not only did the transnational turn within migration research have its upsurge among scholars rooted in the US, but the US is also the largest recipient of international migrants (Population Division of Economic and Social Affairs of the United Nations Secretary 2005). However, the US is followed by the Russian Federation and Germany which are not included in the analyses below²⁴. This means that the biased research focus partly reflects accurate migration flows. Moreover, the review is limited to publications in English and Swedish.

The transnational context

In the study of welfare strategies we must keep in mind that heterogeneity is due not just to variations in goals and preferences, but also to variations in means and possibilities. In order to understand the strategies adopted by certain individual or collective actors, we must not only look at the individual's preferences and what human, social and economic capitals s/he can transfer in order to achieve her/his goals, but also at surrounding features such as the physical and social environment, the historical timing, etc. To consider this in each and every case is of course not possible, but we are still obliged to bear this in mind.

Transnational social spaces do not emerge from nowhere, and above I refer to how Faist delineates social and symbolic ties as the binding glue in transnational social spaces. In exemplifying how transnational social spaces shape migration and adaptation, Faist (2000a: 138-142) draws on the example of Alihan and Yeniköy, two Anatolian villages in Turkey, described by Ulla-Britt Engelbrektsson (1978). The two villages are characterised by the fact that reciprocity is generalised to different degrees.

²⁴ The US is the largest recipient of international migrants, with 38 million migrants in 2005, followed by the Russian Federation (12 million), Germany (10 million), and Ukraine, France, and Saudi Arabia (with over 6 million int. migrants each) (Population Division of Economic and Social Affairs of the United Nations Secretary 2005: 2).

While Alihan is characterised by not only a specific, but also a high degree of generalised, reciprocity including all family and kinship groups, Yeniköy is characterised by a specific reciprocity that does not reach beyond the kinship groups. In effect this means that the potential migrants in Alihan could rely on a reciprocity that encompassed all kinship groups, while in Yeniköy the potential migrant could do so only if s/he belonged to the specific kinship group out of which others had already migrated. These different forms of social capital had great impact on the number and proportion of female migrants from the two villages, adaptation strategies in the host countries (Sweden is the main focus), and how border crossing contacts were sustained over time, both with people residing in the village and with co-villagers residing in other European countries. This illustrates how the *local* context and social networks' dynamics have a bearing on what kind of transnationalism emerges. Obviously this has an influence on what welfare strategies emerge as well, not least depending on whether women and children migrate or stay behind.

In a rather different manner, Frank N. Pieke and colleagues (Pieke et al. 2004) have studied the different patterns of migration in two Fujian villages in China. They emphasise that emigration is embedded in local political, sociocultural and economic institutions and histories. In both villages, transnationalism and migration strengthen each other. However, while village A was characterised by a tradition of migration and migration was integral to the collective identity, this was not the case in village B. In village A, existing transnational ties facilitated the recommencement of migration in the late 1970s and early 1980s, whilst in village B the new migration could not build on such a remembered tradition of migration. But once the migration in village B took off in the 1990s, this lack was compensated for by the attitude of the local authorities. The authors show that in village A it was only at the very local level that the authorities encouraged transnational ties, while in village B they were encouraged on multiple levels. Above all this had impacts on the development in the two villages, but also on the transnational flows. This example underscores that we cannot relate to the country of origin as some kind of 'control context' against which we compare the host country.

Contexts of origin are *local* in character and vary both across states, within states, and over time, and Hirsch (2000: 383) has for instance argued that "we should also explore how the sending communities

themselves are changing". By this she means that we must recognise that "the sending communities are a moving target, subject to historical changes just as the receiving communities are" (Hirsch 2000: 383). This implies that the 'traditional' migrant culture is not a fixed body of norms but rather a category that might be manipulated deliberately by migrants as they forge new cultures, drawing on both the old and the new (Foner 1997). The sending and receiving contexts are both important for transnational dynamics and the transnational perspective accounts for both. Yet the context is not elaborated within the typology presented here.

Typology of transnational welfare strategies

The typology captures different strategies identified from the literature. The presentation of a typology might give the impression that the strategies are static or constant, which is not at all the case. On the contrary, welfare strategies adopted in transnational livelihoods appear to be dynamic processes constantly negotiated. The welfare strategies are divided into four groups drawing on two organising principles: the type of social ties, and the degree of institutionalisation. These organising principles are drawn from Faist's theoretical framework. Whereas welfare strategies across *borders* involve dense social ties, welfare strategies across *boundaries* involve symbolic ties. There are strategies of both lower and higher degrees of institutionalisation across both borders and boundaries.

Table 2. Typology of welfare strategies

| INST. TIES | LOW DEGREE OF INSTITUTIONALISATION | HIGH DEGREE OF INSTITUTIONALISATION |
|------------------|--|--|
| SOCIAL TIES | ENGAGEMENT OF CLOSE FEMALE KIN (1) | MULTI-SITED FAMILIES (2) |
| SYMBOLIC TIES | ENGAGEMENT OF INFORMAL LABOUR (3) | RELIGIOUS INSTITUTIONS (4) |

Engagement of close female kin across borders, and multi-sited families across borders, are typically found within transnational kinship groups,

and the main resource is *reciprocity*. It is significant that transnational social ties are very important facilitators for migration among the less affluent (see e.g. Tienda 1980: 3; Ibarra 2003: 266). Engagement of informal labour is organised around *instrumental reciprocity* and may be viewed to reflect a transnational circuit across boundaries, though this is not what is usually considered a circuit. Reliance on religious institutions as an institution for welfare depends on a generalised *social cohesion* and a common welfare repertoire of symbolic and collective representation, and constitutes a welfare strategy across boundaries.

While welfare is generally resolved in the aftermath of migration, in some cases it is the 'welfare strategy' *per se* that has geared the migration. This can for instance be seen in the case of 'satellite kids' and the engagement of relatives across borders. Hence, welfare strategies as migration motors can be seen independently of social class. The lack of state involvement in these strategies should be noted. Within (Westernised) comparative social policy, the family–market–state is a triad much used in order to distinguish between institutional variances of the allocation of welfare provision (see e.g. Esping-Andersen 1990). However, when, as is the case here, the empirical and analytical focus takes us beyond the Western horizon, other institutions, such as the church, non-governmental organisations and various forms of networks (e.g. kinship, friends and community-based networks), are equally important allocations of welfare strategies. I now proceed to flesh out this typology with empirical examples.

(1) Engagement of close female kin across borders

In the informal security regime, grandmothers and other close female kin play a significant role in child rearing (for a discussion see e.g. Toro-Morn 1995: 719-722; Plaza 2000: 80-85; Hondagneu-Sotelo and Avila 1997). In a study focusing on Caribbean-born grandmothers, Plaza (2000) examines the emigration process to Britain and how the adjustment of Caribbean living arrangements and family structures to British society evolves. He shows how the role of grandmothers has diminished from having played a central role in family relations in the Caribbean, to a marginal role in accordance with the British norms. At the same time, however, Plaza depicts the emergence of the 'international flying grannie' or 'transnational grannie'. These are women who spend part of their retirement days travelling between family, kin and fictive kin in the

international diaspora of New York, Toronto, Miami, and the Caribbean. Most visits are social in nature, but some of the grandmothers were providing temporary foster care or child-minding services for shorter periods (1-6 months). However, this trend was more common among families in which the children had grown up in Britain, and subsequently migrated to North America in pursuit of better opportunities to make a living. When these 'double lap' migrants, as Plaza calls them, were about to have their own children it was not uncommon that their mother flew out in order to oversee the adjustment of the new baby (Plaza 2000: 97).

Plaza (2000) pictures how the social support provided by grandmothers was crucial for enabling migration in the first place, that is, from the Caribbean to Britain. This I deal with below as multi-sited families and 'child shifting'. But he also shows how the second and third Britain-born generations acculturated to British norms, and disconnected grandmothers from the nuclear family. Instead they came to rely on services provided by local authorities and the state or on close friends. However, when family members migrate a second time, this time typically from the UK to the United States and Canada, the grandmothers have a revival as care givers and become the 'transnational grannies'. Plaza does not discuss what factors contribute to this development, but the timing of migration seems to be one plausible explanation. However, it is plausible that due to technological development and related time-space compression, the transnational social ties were more feasible in the second wave of migration (1980s and 1990s) than in the first (1950s).

In a study of Puerto Rican women residing in Chicago, Toro-Morn (1995) illustrates how social class structures kinship groups' arrangements. She examines how married working-class and middle-class women in the Puerto Rican community of Chicago have entered the migration process, and how social class is central to the migration process. "While middle-class women talked about their migration as motivated by professional goals, working-class Puerto women talked about how they came to take care of their children, husbands, and families" (Toro-Morn 1995: 713). In consequence, Toro-Morn argues that a definition of 'labour migration' addressing solely productive labour is too narrow. Not all labour migration relates to productive work; rather reproductive work is indeed one aspect deserving more attention. "Within this category, there are women who migrate as wives, as grandmothers, or as relatives, and whose major responsibility is to help with the reproductive tasks – be they

housework or child care – of their own families and/or their extended families" (Toro-Morn 1995: 713). While married working-class women came to support and be with their families, the educated middle class women tended to have an agenda on their own, and while working-class women seemed to struggle over the decision to migrate, the middle-class women were less encumbered by such relations of authority. They shared in the decision making and were less dependent on other family members to make the move. In spite of differences with regard to means and goals, Toro-Morn argues that both working- and middle-class Puerto Rican women tried to provide continuity in the process of forming and recreating family life.

In social contexts where women carry the responsibility for the reproductive tasks, gender roles tend to be more rigid. This holds true for working-class Puerto Ricans (Toro-Morn 1995: 719-723; see also e.g. Sánchez Korrol 1983: 85-117). For instance, in Chicago some working-class husbands would take a double shift so that their wives could stay home to care for the children and do the housework. However, to make ends meet, many married working-class women worked. Under such circumstances, the women tended to view their employment as a temporary necessity and they developed short-term arrangements to deal with the daily needs of childcare. One such strategy involved bringing over relatives from Puerto Rico to help to care for the children in Chicago. This illustrates how working-class women can get involved in the migration process to do the reproductive work, allowing other women to do the productive (Toro-Morn 1995: 722; see also Salazar Parreñas 2000 and Lobel 2003 on this topic).

When children reached school age, both husband and wife were able to work during the day, though for wives there were always the additional responsibilities of returning home to care for the children and do the household chores. Here, girls were introduced to the household responsibilities at an early age and were left to care for younger brothers and sisters. This was also a way in which working-class mothers trained their daughters in the 'traditional' gender roles (Toro-Morn 1995). Nonetheless, the introduction of employment and personal income among married women may exert pressure on previous gender structures within the family. Pessar (1984) has discussed the shift from the hegemony of one sex over decision-making and control over domestic resources, to a more egalitarian division of labour among Dominican

families residing in the United States. The women's improvement in status within the family started after the migration to the United States, and was often a by-product of their waged employment. As women started to share the breadwinning with their husbands, they also expected partnership as head of the household. Pessar (1984: 1190-1195) describes these shifts as concerns of the 'double burden' and household budgeting. Regarding the double burden, the majority of the interviewed women had reached a compromise that included a minor participation of the husband in the housework. This contribution to the housework tended to increase when the children were young and decrease when the daughters grew old enough to help their mothers. This is congruent with Toro-Morn's observations mentioned above, and it calls attention to the strong link between the family as an institution that carries out certain functions and a set of social relations within the family. The organisations of productive and reproductive work are intertwined and interdependent, and not easily separated. In the discussion on welfare across borders and boundaries I relate to this link.

(2) *Multi-sited families*

The formation of multi-sited families involves a division of the family across borders. In many cases this division is only a stage in the migration process. The typical procedure of stage migration is that either the wife or the husband migrates first, and then the rest of the family follows after some time of varied length (for variations of stage migration see Orellana et al. 2001: 575-577, 579). Yet, rather than as a stage in the migration process, in some cases the division of the household is better understood as a strategy *per se*. The empirical examples illustrating this strategy depict first what have been called 'child shifting' and 'transnational mothering', and second what have been denoted 'astronaut families' and 'parachute (or satellite) kids'. While child shifting and transnational mothering are significant at the lower end of the social stratum, astronaut families and parachute kids are significant at the upper end.

Child shifting occurs when minor or dependent children are relocated to a household that does not include a parent. Toro-Morn (1995: 721-722) has studied child shifting among working-class Puerto Rican families. If the family could not afford migration of all family members to the United States at once, the mothers used to resolve the problem by leaving the children in care of the grandparents in Puerto Rico. Once the whole

family was in Chicago, the working mothers developed short-term arrangements, such as 'shift work' and reliance on kin, to deal with the daily needs of childcare. Child shifting raises questions about motherhood and mothering from a distance. I shall discuss these questions by drawing on Salazar Parreñas (2001) who has studied Filipina women in Rome and Los Angeles, and Hondagneu-Sotelo and Avila (1997) who have studied Latina women in Los Angeles. Under focus in both of these studies is the domestic sector, i.e. housework and child caring.

Both studies point out that there is an increasing number of women migrating internationally in search of jobs. Many of these leave their children behind with grandmothers, with other female kin, with the children's fathers, and sometimes with paid caregivers. In some cases the separations over time and distance are substantial (Hondagneu-Sotelo and Avila mention ten years, and Salazar Parreñas four years). This migration pattern contrasts with previous stage migration, in which the husband migrated to support his family and the wife stayed to take care of the children and do the housework.

Clearly, this migration pattern obviates traditional roles of mothering, and consequently the forging of new arrangements and meanings of motherhood has emerged. The 'transnational' or 'long-distance' mothering radically rearranges mother-child interactions and requires a concomitant radical reshaping of the meanings and definitions of mothering. Hondagneu-Sotelo and Avila (1997: 559) points out that the reliance on grandmothers and other close kin for shared mothering is well established in Latin American contexts. It is a practice that signifies a more collectivist, shared approach to mothering which, they argue, might facilitate the emergence of transnational motherhood.

The *astronaut family* refers to a migration strategy among Chinese business and professional families, manifest in immigrant gateway cities such as Los Angeles, Vancouver, Sydney, and Auckland (see e.g. Skeldon 1995; Ong 1999: 18-21, 127-129). It gained much popular attention in connection with the change of sovereignty over Hong Kong in 1997 which spurred this type of migration. It refers to when a family migrates to a country in which the wife and children will set up their living (earning rights of residence) whilst the husband commences long-distance commuting to his workplace, most commonly in Hong Kong or Taiwan (earning money). This long-distance commuting means long-term separations of the family members.

Waters (2002) has investigated 'daily and life-changing consequences' of this type of migration by interviewing 'astronaut wives' residing in Vancouver. These are upper- and middle-class Chinese married women. Nearly all were employed before coming to Canada, but in Canada only two out of twenty-four were working and all were supported by their husbands who sent money on a regular basis. Several had tried and failed to find a job, and some had succeeded but given it up since they could only get a job at a considerably lower level of qualification than what they had had before migrating. As in the case of child shifting, this is an inverted version of traditional stage migration, yet in this case the family does not strive to reunite in an immediate future. The primary reason for migrating was a concern of the children: "We think it is a good place for the children. Not for me" one of the interviewees says (quoted in Waters 2002: 120).

In Hong Kong and Taiwan, many of the women typically had a time-consuming career leaving them with little time for their children, who were cared for by nannies. Most had domestic helpers and many interviewees lacked elementary domestic skills upon arrival in Canada. Consequently many expressed anxiety with regard to housework and in particular the provision of child care. The interviewed women had no friends or kin in Vancouver and missed the extended family and social networks at the place of origin. However, after some time in Vancouver, Waters concludes, the women tended to find compensation for these losses. Waters (2002: 125) point out that her interviewees do not recognise child care responsibility, lack of employment and economic dependence as oppressive, which stands in contrast to other research (Man 1995:315, ref. in Waters 2002: 125). Instead, the interviewees perceived spending more time with their children as a positive benefit, and they had come to appreciate leisure as a contrast to the stressful life in Hong Kong/Taiwan (Waters 2002). However, in a footnote we are informed that an anonymous reviewer has raised the question whether this may be understood as *post hoc* rationalisations. Against the discussion of subjective welfare in the introduction, I find this objection plausible²⁵. Nonetheless, it is clear that in the host context these upper- and middle-class women will spend their time on leisure, doing housework and caring for their

²⁵ In addition, Waters is one of the few references that have not applied an ethnographic methodology. Her approach is single-sited and the interviews are (presumably) conducted in English. It is likely that this influences the validity of the data.

children. Upon arrival, many try but fail to find a job, and after some time in Vancouver they start to express satisfaction with being unemployed since it enables them to have time on their own and with their children (Waters 2002, see also 2003a: 229-231).

Satellite kids, sometimes referred to as *parachute kids*, represent a slightly different phenomena compared to astronaut families. It refers to dependent children who are dropped off, or parachuted, in schools in cities like Vancouver, Sydney or Los Angeles. The parents arrange good living conditions, enrolment in a good school, and mostly the care of relatives or paid caregivers. They will then return home and give their parental support from a distance. The parachute children are overwhelmingly Chinese, but Indians, Koreans, and Filipinos can also be observed (Zhou 1998). The children's overseas education is expected to function as an entry ticket for family work (business) and residence in the new country (Ong 1999; Zhou 1998). This phenomenon has been studied in urban areas of Southern California by Orellana, Thorne, Chee and Lam (2001) and Zhou (1998), in Sydney by Pe-Pua, Mitchell, Castels and Iredal (1998), and in Vancouver by Waters (2003a, 2003b). The study by Orellana et al. (2001) is really a broader project studying 'transnational childhoods' among Latino migrants, Korean 'parachute kids', and Yemeni migrants in urban areas of Southern California.

The parachuting of kids is often connected with parental aspirations regarding education and future careers (e.g. Ong 1999; Zhou 1998). However, in a foreign country the parachute children are not only away from their families, the social networks of support and control, and the customary mechanisms of social relationships between children and adults; they are also subjected to American society and American norms. Zhou (1998) points out that before departure "neither parents nor parachute kids seem to anticipate such drastic differences in the social environments of parachuting". Implications of social or 'cultural' transformations following the parachute experience have been discussed by Zhou (1998) and Waters (2003a) (see also Orellana et al. 2001: 583). Waters (2003a: 228) illustrates differences by quoting a Taiwanese boy who depicts Canada as 'pretty slow' while in Taiwan 'every second is a war'. Another boy, referring to how his parents perceive the situation, says that "They think I am too slow ..." (quoted in Waters 2003a: 228).

Moreover, Zhou (1998: 9-11) highlights implications of the changing character of interaction between parents and their children. "In the

parachute world, routine interaction between children and parents is by weekly telephone calls or by mail". That is, the means for controlling and supporting their children are radically changed. In Zhou's interviews the children express both dissatisfaction over not being able to talk to their parents in person, and satisfaction over being independent of parental control. Nonetheless, since the children were spending long hours every day out of adult control, they tended to develop an independence which, in effect, meant that they would not obey their parent as they used to. This implies that the process of transformation involves experiences of changing social relations. In the interviews the parents expressed worries over these developments. Zhou (1998) found two main ways of retaining control over their children across borders: parental social networks – of relatives, friends and caretakers in the United States – and monthly allowances.

As already pointed out, the study by Orellana included families from Latin America and Yemen. These families do not illustrate the phenomenon of parachute kids. Yet they experienced transformations of their children. In some cases this 'problem' was resolved by sending the children back to the place of origin for a period of time. The children then "come back different people", one of the interviewees says (quoted in Orellana et al. 2001: 584). This may be emphasised to illustrate a territorial dimension of family relations.

(3) Engagement of informal labour (in absence of close female kin)

Informal/extra-legal arrangements refer to precisely this. Migration often involves leaving behind the kin who are crucial for the provision of child caring and parenting. As has been described above, close female kin may sometimes be engaged to do this caring. However, for various reasons this is not always the case. Instead, some families rely upon informal arrangements dependent on instrumental reciprocity.

In a historical study of the Puerto Rican community in New York, Sánchez-Korrol (1983: 98) writes that "clearly, with the limitations of extended family groups or multifamily households, coupled with a scarcity of bilingual-bicultural daycare facilities, another system for reliable childcare became essential for working Puerto Ricans in New York City". This implies that it was not merely the absence of the extended family, but also limited language skills, that led to the creation of 'ethnic childcare' in the Puerto Rican community. In another study, Toro-Morn (1995: 722)

illustrates how a mother as a last solution turned to a woman in the same building who could care for her children for a smaller fee. Toro-Morn further points out that this type of "grass-root system served both employed women and women who had to stay at home". The mother would typically bring the child together with food and clothing, and collective him/her after work. This system provided extra income to the caregiver, and to the caretaker it provided a system with advantages not available in established childcare institutions, Toro-Morn argues. "These informal child care arrangements allowed children to be cared for in a familiar environment, where there was mutual trust, agreements between the adults involved, and flexibility. Children were cared for in a family setting where the language, customs, and Puerto Rican traditions were enforced."

(4) *Religious institutions*

Religious institutions constitute an institutionalised alternative that people rely upon to achieve welfare alternative or supplementary to the host society welfare. In a study of Islamic organisations in France and Germany, Amiraux (2000: 240) has argued that "religious associations owe their survival to their capacity to provide social services, to offer comfort and support, to facilitate daily life, to maintain community links, and to ensure the production of cultural preferences to a removed population". There is a set of literature that underscores the significance of religious institutions in processes of transnational migration. In fact, research indicates that migrants may not only become more frequent visitors to the church (or mosque, etc.) upon migration (e.g. Al-Ali 2002a, 2002b), but even convert in order to attend (Min 1992: 1375-1377). Below I illustrate how religious institutions may provide an alternative set of norms and values in the fostering of children. In fact, more than a *religious* alternative, these religious institutions present an *institutionalised* alternative.

Min (1992) has described the structure and social functions of Korean immigrant churches in the United States. His study is based on interviews with Korean head pastors in New York City, and he considers the provision of social services for church members as well as the Korean community as a whole. In the analysis (1992: 1385-1387) he distinguishes between social services that are delivered in an informal way and in an organised way. Informally, head pastors and other religious leaders help

church members on an individual basis. This may be through counselling or the provision of information, visiting hospitalised members, and interpreting and filling out application forms. Formally, the Korean ethnic church provides services for church members by way of programs such as the Korean language school, the Bible school, seminars and conferences. He shows that the language barrier and difficulties in finding a job are the two major problems facing immigrants. Moreover, he shows that Korean pastors are greatly involved in helping church members with problems with the children as well as other family problems. In fact, the church-sponsored seminars were found to cover the topic of children's education and educational problems more frequently than any other topic.

While it is not surprising that churches provide social services, it is interesting to note that the social services provided by Korean ethnic churches are of a different nature than those provided by earlier white immigrant churches and synagogues, Min points out. Korean ethnic churches focus on counselling and educational services for Korean families with marital and juvenile problems, while synagogues and Catholic churches provided earlier European immigrants with economic assistance, as well as housing and work. Min (1992) argues that this demarcates a difference between earlier European and more recent Korean immigrants: the earlier European migrants extensively belonged to the lower end of a social stratum and were usually in lack of resources. Hence, meeting basic economic needs was important for their adjustment. By contrast, more recent Korean migrants are middle-class and the vast majority have brought a moderate or significant amount of money and belongings from Korea. This is why family and non-economic adjustment problems are more serious than economic problems to them, Min writes. However, above I have referred how Latino and Yemeni immigrant families experienced adjustment problems (Orellana et al. 2001). These adjustment problems are similar to those described by Min. The Yemeni families are quite wealthy whereas the Latino are not, yet both groups experienced problems with 'cultural transformation' among their children. This understanding serves to undermine Min's statement that the 'new' social services reflect changed experiences among migrants due to their social positioning. This also leaves open the question of how we can understand the shift.

Welfare crossing borders and boundaries

The transnational perspective contributes to insights about migrants' positioning in relation to both the society of origin and the host society. The social space of a single state does not correspond to the social spaces that individual and collective transnational actors inhabit. By contrast, transnational livelihoods tend to involve the crossing of traditional borders and boundaries in more senses than one. This is significant for transnational welfare strategies. If borders denote territorial state borders, and boundaries denote what separate the norms and values of a certain nation-state from those of others, transnational welfare avenues across *borders* refer to strategies involving spatial mobility across state borders, and transnational welfare avenues across *boundaries* refer to strategies challenging norms and values of 'national' welfare.

Migrants arrive in the host society with a welfare repertoire on their own, which in varying degree challenges and is challenged by the host society's standardised repertoire. Transnational avenues for welfare across boundaries can cross either the boundaries of the personal repertoire or the boundaries of the host society's standardised repertoire. In a life-cycle perspective, crossings of the boundaries of the personal repertoire typically involve *transformations* of the social, and crossings of the boundaries of the host society's standardised repertoire involve resistance to the norms and values of the host society and *preservations* of the social. While the transformation of social roles and relations are more associated with *gender* relations, the preservation of them is more associated with *intergenerational* relations. This implies at least two things. First, that transnational social spaces anchored in two or more incongruent repertoires of welfare involve both *border* and *boundary* crossings. Second, transnational social spaces present individual and collective actors with alternative welfare repertoires and increased degrees of *choice*.

Welfare is intimately interrelated with the organisation of productive and reproductive work. This is illustrated in the empirical examples presented above. This discussion of welfare crossing borders and boundaries revolves around transformations and preservations of the family as an institution and as a set of social relations. Such transformations and preservations typically occur in relation to the gender division of unwaged labour within the family and of waged labour outside the family. I first discuss the family as an institution considering the

division of (re)productive work. I then turn to the family as a set of social relations which are understood as interrelated with social roles within the family. Social class and gender are organising principles in these discussions. Rather than comparing the 'old' with the 'new', I consider how these variables interplay in the migratory process. This means that the discussion relies on interpretations that take different social locations as well as different geographical scales into account.

The family across borders and boundaries of re/productive work

The typology indicates that transnational child caring and parenting across *borders* involve the relocation of children across borders, the leaving of children behind, and the engagement of relatives (grannies and young females) across state borders and transnational mothering. Borders are indeed real, but so are social and symbolic ties across borders. The crossing of borders exerts pressure on families and on relations within families. This may be manifest through emotional distance in marital relations (Waters 2002: 123-124), or through pressures on mother-child relations (Hondagneu-Sotelo and Avila 1997; Salazar Parrenas 2001; Ibarra 2003). As indicated by the typology, transnational avenues across *boundaries* may involve reliance upon religious institutions, sending back children with the purpose of re-socialising them, the emergence of new norms and values of (transnational) mothering, and the engagement of relatives or informal help in order to resist host society norms and values.

Migration affects the family in multiple ways. The family as an institution is shaped in relation to the division of re/productive work outside the family. Migration appears to affect the gender division of productive work outside the family at both ends of the social continuum. At the lower end, migration appears to involve increased female labour market participation, and at the higher end it involves decreased female labour market participation. This is exemplified above by the less well off 'transnational mothers' and the better-off 'cosmonaut wives'. However, whereas the division of the productive work outside the family is affected due to the migratory process, this is not necessarily the case for the division of the reproductive work. For instance, Toro-Morn's (1995) and Sánchez Korrol's (1983) studies of the Puerto Rican, and Pessar's (1984) study of the Dominican communities in the United States show that the Puerto Rican and Dominican women residing in the United States took

on roles of waged labour that they did not have prior to the migration, at the same time as they kept up the unwaged labour at home.

Toro-Morn (1995: 712-719) shows that both working-class and middle-class Puerto Rican women found themselves migrating as part of family migration. However, while working-class women came to support their husbands and to be with their families, the educated married middle-class women shared in the decision-making and were less dependent on other family members to make the move. Some interviews suggest that the middle-class women had professional agendas on their own. By contrast, most working-class families resisted women working in accordance with 'traditional' Puerto Rican family values. The men would take a double shift so that the wives could stay home and take care of children and do housework. When economic necessity obliged women to work, they viewed their employment as a temporary necessity. The interviews provide examples of women who wanted to work but who were forbidden to do so by their husbands. (Toro-Morn 1995: 720). There are also examples of women who reported that, whereas they stopped working for wages, they continued to contribute the family's income by working in their husband's neighbourhood store (1995: 721). The data also provide an example of a woman who resisted the "traditional roles and even sought to change them" by working secretly, but when after three months she told her husband about her work escapade she was forced to give it up (Toro-Morn 1995: 722). Regardless of whether they worked outside the home or together with their husband in the family business, the Puerto Rican working-class mothers were still responsible for the care of the children and housework.

Although the middle-class women felt differently about work and family obligations, they rejected traditional ideologies about women's roles and saw no conflict in both mothering and working. Their class position afforded them options and greater flexibility such as staying home until they were ready to return to work, hiring help, and organising their schedule around their children's schooling (Toro-Morn 1995: 723-5). The upper-class 'cosmonaut wives' typically had a professional career before migrating, but they were unable to take up equivalent work in the host society and hence they became (unwaged) housewives.

Changed patterns of labour market participation affect the family not only as an institution, but also as a set of social relations. This means that the migratory process may alter prevailing social relations and affiliated

social roles within the family as well as challenging the prevailing norms and values about these in the host context.

Family relations across borders and boundaries

Social relations are patterned in a complex way into hierarchical structures along (for instance) the dimensions of social class and gender. Spatial mobility involves changes in these patterns at multiple scales. Implications of different structures can be accepted or resisted in varying degrees. Of interest here are transformations and preservations of social relations and affiliated roles that occur due to the extension of a single-sited framework to a multi-sited transnational framework of the everyday life. Within an informal security context, welfare is typically allocated to kin. In general, this means that it is allocated to women. The extension of the single-sited context to a transnational context tends to affect gendered roles of women to a larger extent than those of men²⁶.

The cited literature indicates that whereas the rigidity of the gender division of (waged) productive work outside the family varies along the social stratum, the gender division of (unwaged) reproductive work within the family is more rigid overall. The study by Pessar (1984) on Dominican women and the study by Toro-Morn (1995) on Puerto Rican women indicate that a middle-class position enabled greater flexibility, compared to women at the lower end of the social stratum, and that this typically entailed a transformation of 'traditional' roles. Such a transformation involved an extension of the female role to include productive work, whereas the reproductive roles were not extended to the men. The new orientation to workplace among Dominican women migrants challenges the more 'traditional' ascription of men to the public workplace and women to the private household. However, Pessar (1984: 1194) argues, the employment has not provided women with a new status as working women that challenges or subordinates their identities as wives and mothers. Rather on the contrary, in many cases work has reinforced these statuses because it has allowed women to redefine their roles as wives and mothers in a more satisfying manner than prior to their residence and employment in the United States.

²⁶ It should be noted, though, that no study with an explicit focus on men has been included. I have simply not encountered any such study of relevance.

Since the status of a household head among Dominicans is conceived in material terms, the women begin to expect partnership as head of household as they start to demonstrate their capacity to share this responsibility with men (Pessar 1984: 1191). Hence, the budgetary control is of specific interest. In 38 out of the 55 households investigated, the budgetary control was pooled. Of these, 20 were nuclear and, owing either to the absence of a senior male or to his irregular and limited financial contribution to the household as measured against those of the senior woman, 18 are female-headed. Income pooling in nuclear households brings women advantages unknown before migration to the United States. First, income responsibility is distributed among family members, thus mitigating the invidious comparison between 'essential' male contribution and 'supplementary' female inputs. Second, according to informants, increased male participation in decision-making and in managing irregularities in income flow has led men to appreciate more fully the experience and skills women bring to these tasks (Pessar 1984: 1194).

Conflicts over budgetary control may be serious and lead to divorce. Of 18 couples who had separated while in the United States, 14 reported budgetary conflicts as primary factors for separation. However, in most cases the senior male adapted relatively easily to a more egalitarian mode of budgeting, and Pessar points out two factors as significant for this. First, the ideology of emigration as a shared household experience appears to have an influence. The collective relocation appears to lessen social distance and power inequities along gender and intergenerational lines. Second, both Dominican women and men expressed a desire to emulate what they believe is a more modern and less conflictual American pattern of sharing household decision-making between women and men. These two processes facilitated the adaptation of a more egalitarian form of household budgeting – the transformation of the family as a set of social relations. The opposite, that is, the preservation of the family as a set of social relations, or in the words of Pessar a 'backward process', was identified in households where women significantly reduced their level of contribution to the household budget. Whether this change occurred in the United States or upon return to the Dominican Republic, the man commonly asserted his dominance by allocating a household allowance to his wife and reducing her authority over budgetary decisions (Pessar 1984: 1194). In this way the extension of the everyday life from a single-sited to

a multi-sited context, with diverging boundaries of welfare, may affect the family as a set of social relations.

When the extension of the everyday life involves a multi-sited strategy, borders rather than boundaries exert pressure on the family as a set of social relations. The social roles that emerge as a consequence of the long-distance relationship may transform to reflect the new situation. Hondagneu-Sotelo and Avila (1997: 557) have stated that the ideal of biological mothers raising their own children is widely held but is also widely broken at both ends of the class spectrum – wealthy elites have always relied on others to raise their children, while poor, urban families often rely on kin and ‘other mothers’. With regard to the empirical examples cited above, this seems to hold true at the lower end of the class spectrum, but to diverge at the upper. Whereas women from the lower end migrate to care for other’s children, upper-end astronaut wives migrate to care for their own children. These are mothers who had a working career before migrating and who after the migration stopped working and started to spend more time with their children. In Waters’ interpretation, these women are content with the new (traditional) mothering role. However, it is possible that this is rather exceptional and should not be regarded as a counterargument to Hondagneu-Sotelo and Avila’s statement in the first place.

Transnational mothering puts pressure on a mother ideal of another kind. Hondagneu-Sotelo and Avila (1997) have found that women who left their children behind were actively, if not voluntarily, seeking alternative constructions of motherhood, and that "transnational motherhood contradicts both dominant U.S., white, middle-class models of motherhood, and most Latina ideological notions of motherhood". The transnational caring circuit spans regular joint custody or ‘other mother’ arrangements which typically are spatially and temporally more closely bound than the transnational mothering (Hondagneu-Sotelo and Avila 1997: 567). "Transnational mothers continue to state that caregiving is a defining feature of their mothering experiences". Instead of replacing caregiving with breadwinning, they extend their definition of motherhood to "encompass breadwinning that may require long-term physical separations" demanding a painful cost (Hondagneu-Sotelo and Avila 1997). Also the Filipina migrant women in Rome and Los Angeles interviewed by Salazar Parrenas (2001: 8-26) extended their definition of motherhood to encompass breadwinning. In both studies the women

expressed a sufferance of mothering from a distance. Care as an activity was replaced by breadwinning, and care as love was commodified in presents sent to compensate for the mothers' absence. Whereas the Latina nannies endorsed motherhood in contexts of sufficient financial resources, in the situation of financial shortage, such as their own, they advocated more elastic definitions of motherhood, including separations of mother and children across time and space (Hondagneu-Sotelo and Avila 1997: 566).

A variant of 'transnational mothering' can be seen in the cases of 'parachute kids', but with one difference: in these cases the child is shifted away and enrolled in school in a foreign country. In these studies 'childhood' instead of 'motherhood' is under focus. Orellana and colleagues (2001: 578) stipulate that children are defined and positioned along a number of parameters that vary from one country to another. This means that despite an overall consensus that bringing up children requires adult labour, what kind of labour is believed to be needed varies with time, place and context. Moreover, children's move to self-sufficiency and capacity for labour are perceived and organised in multiple ways. The most obvious and already mentioned example illustrating this dilemma is how the migration of parachute kids challenges mainstream (U.S.) notions of what children can and should do on their own at particular ages (Orellana et al. 2001: 581, cf. Garrison and Weiss 1979 for a similar discussion of variations in notions of the family). Zhou (1998) points out that in the United States, 'home alone' among minor children is illegal, and separate living between minor children and parents is extremely rare. In the situation of parachuting, differences in the understanding of what is acceptable and unacceptable can be addressed to variations and incongruence between different organisations and meanings of childhood.

Recognising that different welfare repertoires involve different conceptualisations of the family as an institution that carries out certain functions and as a set of social relations within the family, we are led to consider what constitutes a family too. Divergent notions of the family can be discussed in terms of conjugal and consanguinal family ties. These are two stylised notions of the family positioned at the opposite ends of a continuum. The *conjugal* family refers to the nuclear family consisting of the conjugal pair and its offspring. It is primarily responsible for its own maintenance. The *consanguinal* family refers to familial and kinship-oriented family ties, and is typically responsible for its maintenance across

the generations. Garrison and Weiss (1979) have studied the tension between conjugal and consanguinal family ties among Dominican families residing in the United States. They argue that whereas adulthood and independence within the (American) conjugal family centre on the move out of the parent's household and the establishment of a home on one's own, within the consanguinal family a separation from the parental residence does not constitute an act of 'independence' or imply separation from parental influence. The tension between consanguinal and conjugal ties among Dominican families residing in the United States is illustrated in a statement from one of the informants: "My husband is the father of my children and I respect him. But if it comes down to it and my husband asks me for something and my parents or any of my siblings ask me for something, I will give to them before I give to my husband because they have done more for me." This statement demonstrates primary loyalty and obligation to parents and siblings, before loyalty to husbands. Among Dominican women, this is the expected pattern of loyalty (Garrison and Weiss 1979). Hence there is a striking contrast between what constitute the cooperating units among U.S. and Dominican families; the 'primary' family is a different unit of kin. Plaza's (2000) study examines not so much the tension between the consanguinal and conjugal ties, but illustrations that these are negotiable over time and that the consanguinal family ties prove to be valued in connection with the second wave of migration.

The consanguinal pattern of family ties is also illustrated in a study among female labour migrants in Britain (Anderson 2001). Out of 150 respondents, only two indicated that the informant sent money back solely to her husband. Far more common was to send money to mothers, sisters and daughters. When asked why this was the case, the answer was that men were not to be trusted: "They are vices, are selfish and will not give the money to the people (usually children) who most need it." It was striking, Anderson (2001: 678) writes, that the six nationalities participating in the discussion shared an absolute position on this and supported it from their personal experiences. This result is congruent with studies of intra-household poverty distribution in development contexts, indicating that the allocation of resources to women has a better poverty-reduction effect in that women to a higher degree distribute resources within the household according to *need* than men do (e.g. Sen 1984). Anderson's study is single-sited and she interprets the result in the local

context. Hence she sees to the respondent's membership in the United Workers Association and their common experiences as domestic workers in the Britain, and argues that this creates a strong solidarity between the women and that gender is a binding factor (Anderson 2001: 678). However, in the light of the perspectives discussed here, Anderson's result may be understood as an example of consanguinal family patterns stretching out across borders. This means that sending back remittances to female kin constitutes an act of continuity and that *sanguine* dependence combined with gender is the binding factor.

Needless to say, the transformations of family relations described here are mere theoretical abstractions. In real life these are blurred and not clearly distinguished from one another. What I have attempted is to picture how social hierarchies may interplay transnationally (the vertical and horizontal overlap) and how they can be understood in the everyday life of individual and collective transnational actors. Social relations and hierarchies organising these vary over time and space, and people leading a transnational livelihood will in varying degrees interplay with two or more sets of hierarchies.

Part II

The nation-state and social policy

Social policies play an important role in mediating the relationship between individuals and society. They shape and are in turn shaped by how people live. Their functioning generates and sustains inclusion and exclusion of individuals in society in a multitude of ways. In this part, I consider Swedish social policies in relation to the state structure and in relation to everyday life. I draw on the territorial turn within social policy research and I pay special attention to the relationship between the welfare state and the nation-state, between social policy and nation-building, but also to hierarchical structures of power. The analysis indicates that Swedish social policies assume an expected relative immobility within its citizenry. It is plausible that this has pressing implications for people living their lives anchored in two or more nation-states across welfare state borders and boundaries.

I start out with a theoretical discussion on the institutional structuring in territorial perspective. I develop an understanding of the institutional structuring of the life course in relation to nation-building and hierarchical power relations within and outside the family. Next, I carry out an analysis of the Swedish nation-state with regard to welfare at the policy and the everyday level, in three steps relying on secondary data drawn from literature reviews. First, I focus on the Swedish institutional context in a very *longue durée* perspective. Against the backdrop of this understanding, I consider the operational logic of the Swedish type of corporatism, looking at the formation of Swedish social policies connected with the creation of extensive child care facilities and the dual-earner family. Third, I consider some consequences of these social policies for the organisation of welfare at the everyday level. The analysis is finalised with a discussion of welfare as bordered and bounded in the Swedish context. While equality and solidarity have been central hallmarks within the Swedish welfare state, here I discuss limits of these hallmarks with regard to the Swedish labour market and prevalent norms and values.

Institutional structuring in territorial perspective

The institutional structuring of the life course is an approach that focuses on the *institutional structuring* as an abstract micro–macro link, and on empirical variations in *life course* patterns over time and in cross-national comparison. I consider the welfare state as a *structuring* agent and the outcome of this structuring in everyday life – the life course *structuration*. The standardisation of life course structururations is conceptualised as ‘normal biographies’ and my concern is how these may be understood from a territorial perspective. Whereas for instance Ferrera (2005a) from a state-building perspective has shown that national social insurance schemes function to lock-in citizens, I develop an understanding of the (national) ‘normal biography’ as consisting of certain sets of social relations and consider how these may have a lock-in (and ‘lock-out’) effect too. This means that I connect the territorial perspective with an understanding of social policy as both constituted by and constitutive of hierarchical structures of power operating both outside and within the family.

Institutional structuring of the life course

Studies of the *life course* originate from the pioneering study *The Polish peasant in Europe and America* by William I. Thomas and Florian Znaniecki (published in five volumes between 1918 and 1920) (Elder et al. 2003). In their study, Thomas and Znaniecki used a life study method with the aim of getting immigrants to tell their own life stories. This was new at the time, and it laid the foundation for what later developed into the ‘Chicago school’ (Thomas had a position at the University of Chicago when the study started) (Zaretsky 1996). While this first proposal of the life course approach did not gain much attention, since the 1960s interest in it has proliferated. Today the study of the life course "entails multiple levels, from the macro structures and social institutions of society to the micro experiences of individuals, and draws upon both quantitative and qualitative data in a mixed method approach" (Elder et al. 2003: 7). Obviously, a magnitude of approaches to the life course can be found, and here I do not intend to provide an exhaustive account of these. Instead, I primarily focus on the *institutional structuring* of the life course.

Characteristic for life course studies is a concern with *sequential* or *temporal* patterns of the life course. These patterns are typically divided into the childhood–adulthood–old age, alternatively the education–employment–retirement tripartite. When limited to a micro-level approach, the methodology has been criticised for reducing the study of the life course into a sociology of age-differentiation as if the life course took place in an isolated context. The focus on the institutional structuring of the life course grew out of this dissatisfaction, and is an attempt to link (macro-) structures with the development of the (micro-) life course. It arose from questions like: "How are life courses in advanced societies shaped and regulated? How are the age-graded transitions between life-domains socially organised? How do life courses differ in contemporary societies from those in earlier societies? Which are shaping the allocation of life-time between life domains such as education, family activities, and employment?" (Mayer and Schoepflin 1989: 188; Mayer and Müller 1986: 220–221). This perspective suggests that an age-differentiated (macro-) structure constitutes an incentive for certain (individual) life course patterns. While Mayer and Müller (1986: 233) have argued that life events "become standardised by an institutional superstructure defining the proper course of life", Leisering (2003: 207) has advanced this view into a discussion of a 'normal biography'. This means that certain temporal patterns may become standardised and conceptualised as normal. I am interested not only in the 'normal biography' as a *temporal pattern*, but also in the temporal pattern as a *normal* biography. The implications of a temporal pattern as a *normal* biography are dependent not only on the *sequences* of the temporal pattern, but also on with what *capacity* these are imposed onto the individual life course. It is plausible that a higher capacity of structuring has more far-reaching consequences for the conceptualisation of a generalised *normal* biography than what lower capacities of structuring have. In the discussion below, I am concerned not only with what the institutional structuring results in, but also with the structuring *per se*.

Leisering (2003: 211–214) has elaborated a model consisting of three modes of welfare state operation shaping the life course into certain standardised patterns: structuration/differentiation, integration, and normative modelling. *Structuration/differentiation* refers to the temporal structuring of differentiated social roles associated with sequential phases of the life course. Education and old-age pensions are social schemes that

constitute incentives for temporal patterns of the tripartite childhood–adulthood–old age and for social roles such as school children and pensioners. *Integration* refers to social policy systems that interconnect the different phases and stages in the life course, and *normative modelling* refers to hidden or implicit agendas that serve to shape the life course according to normative models of class, gender and ethnicity.

Under focus in this book are the social roles of child caring and parenting. These social roles depend on the structuring of the life course in a complex way. It is plausible that the creation and implementation of social services such as day nurseries, education, employment, and parental leave may function to shape the social roles of child caring and parenting into standardised patterns. Several operational modes may be embedded in each social service. Education, for instance, shapes the life course as a temporal pattern, has effects on the integration across the life course and, finally, fosters certain norms such as whether women are expected to take employment or not, and whether child caring and parenting are synonymous only with mothering or also with fathering.

In the analysis of the Swedish case, I discuss the social roles of child caring and parenting and how these are normatively modelled²⁷ as the *structuration of welfare* (or welfare structuration). The structuration of welfare is then understood as dependent on the *institutional structuring of welfare*. In order to be able to appreciate the normative modelling, that is, to be able to discuss how ‘normal’ the normal biography is, I pay special attention to the structuring capacity. It is an argument of this book that the state structure is of relevance for this understanding, and the two subsequent sections are devoted to this argumentation. I first review territorial perspectives on social policy and implications of these. Next, I discuss the concepts of bonding and bounding, and their relevance for the analysis below. Finally, I return to the normative modelling of the ‘normal biography’ and how such processes may be understood outside and within the family.

Territorial perspectives on social policy

Arguing that welfare states are intrinsically national in purpose and

²⁷ Here I leave out *integration* from the discussion. The integration mode of welfare state operation is dealt with in the discussion of un/expected biographies in the theoretical framework of Part III.

meaning is not the same as arguing that they are cast in a national mould. In general, there is no outspoken argument for 'national moulds' that have formed welfare states; instead such a mould has been taken for granted in much welfare state research. I take a foothold in the recent territorial turn within social policy research. This research vein is state-centred and geared to an understanding of the nation as involved in the shaping of social policies, and social policies as involved in the shaping of the nation. This means that the services produced by the welfare state are understood as involved in the making of the nation-state. In this line of argumentation, Clarke (2005: 412) has radically claimed that: "Welfare states seek to produce a nation – a People. They attempt to reinforce or enforce certain 'ways of life'; they regulate forms of being and behaviour; they classify and categorise the population (and deal differently with its segments); and they manage the relationships between the public and private realms." Here this claim is taken seriously.

The 'territorial (or geopolitical) perspective' is rooted in political science and typically applied in the analysis of nation-building and state formation. Under analytical focus are tensions between regional, national, and supranational powers, and subsequent processes of decentralisation and centralisation of political power. Concentrations of political power to different societal levels are generally recognised as being dependent on nation-building; the mobilisation of a common identity (typically based on language, ethnicity, history etc.) among the people inhabiting a certain territory. This means that state formation and nation-building are anticipated to depend on territorial and demographic variables. Political scientist Stein Rokkan (1921-1979), whose main interest was mass democratisation in Europe, is recognised as a prominent theory builder in this field.

The territorial understanding of social policy and the welfare state is heavily influenced by Rokkan and is in fact not new as such. What is new is a recent cross-fertilisation between two previously separate understandings of nation-building and social solidarity. Hence, we may sort out an 'old' and a 'new' territorial school of welfare state development and social policy. Within the old territorial school, the welfare state is anticipated to emerge *after* the consolidation of the nation-state. This implies that the welfare state is viewed as a sequential developmental step emanating out of the nation-state. Cohesive contributions in this direction of research have, for instance, been led by Peter Flora and Arnold J.

Heidenheimer. Based on Rokkan's theoretical framework, Peter Flora has led research programs focusing on the historical development of European welfare states from a territorial perspective, and Arnold J. Heidenheimer has led similar research but in the American context (see e.g. the edited volumes Flora and Heidenheimer 1981; Flora 1986).

Recently we have seen a cross-fertilisation between two previously separate understandings of nation-building and social solidarity. While the mobilisation of an identity in common generally is anticipated to be a driver in nation-building (e.g. Gellner 1983), in welfare state analysis social solidarity, and in particular cross-class solidarity, is anticipated to be a driver in 'welfare (state) building' (see e.g. Korpi 1983; Esping-Andersen 1990). In contrast to these anticipations, within the recent territorial turn the solidarity generated and sustained through the social services produced by the welfare state is understood to be involved in nation-building. This may be viewed as a social dimension of the nation-state, or as a territorial dimension of the welfare state. In one instance, social policy analysts have focused on social policy and welfare state development accounting for how the *nation* has influenced these. This has led to a re-thinking of social policy and to book titles such as *Forming nation, framing welfare* (edited by Lewis 1998). In another instance, geopolitical analysts have focused on processes of Europeanisation, devolution and nation-state formation considering how social policy dynamics have influenced these. This has led to an understanding of social policies as a 'social dimension' of nation-building and titles such as *The territorial politics of welfare* (edited by McEwen and Moreno 2005).

The difference between the old and new territorial schools is grounded in their understanding of the relation between the welfare state and the nation-state; between social policy and nation-building. The different perceptions of this relation are bound to be interpreted against the broader societal context in which the research was designed. While the broader context of the 'older' school is a debate about the welfare state's 'growth to the limits', the context of the 'newer' school consists of the 'end-of-the-nation-state' and the 'welfare-state-retrenchment' debates. In the 'old' school, nation-state borders were not called in question as they are in the 'new'. This may be understood against the background that processes of globalisation have altered the Westphalian understanding of the world order. In the following, I sketch some empirical focuses of this research vein, taking account of both academic and more practice-oriented

research.

In academic research, the comprehension of social policy as involved in nation-building has above all emerged in analyses of contemporary processes of devolution and globalisation, but also in historical analyses of welfare state development. Analyses of contemporary processes of devolution and globalisation are about to proliferate²⁸. Pluri-national states such as Canada, Belgium, Spain, and the United Kingdom are frequent empirical focuses, but analyses of France, Germany, Italy, and the Nordic countries can also be found. A general conclusion in these studies is that the interaction of social policy and nation-building is playing out in complex and diverse ways. There are differences not only between the devolved nations, but also between the state and sub-state levels within each state. The differences are, among other factors, due to the institutional settings, the socioeconomic context, and historical experiences. Historical accounts of national welfare state development in (new) territorial perspective are more limited in numbers (but see for instance McEwen 2002 and Lewis (ed.) 1998; see also Ferrera 2005a: Chapter 2).

Both the UNRISD and (certain factions within) the World Bank have considered social policy as a tool for nation-building and democratisation in developmental contexts. UNRISD has for instance done so within the programme area *Social Policy and Development* running during the years 2000-2005. This programme focused on both contemporary welfare states in historical perspective and the prospects of social policy for democratisation and welfare (state) building within developmental states (see UNRISD 2005 for a brief summary of the project; cf. for instance the edited volumes by Mkandawire 2004 and Adésinà 2007 for in-depth analyses). The World Bank has also taken up the social dimension of economic development. This has brought about a commitment to mainstream social policy in the bank's core activities and the formulation of the *Arusha Statement – New Frontiers of Social Policy* (World Bank 2005). Roughly speaking, the Arusha Statement is designated to build a

²⁸ Coherent contributions are: *The territorial politics of welfare* co-edited by Nicola McEwen and Luis Moreno (2005), "Devolution and public policy" special issue of *Regional & Federal Studies* co-edited by Michael Keating and Nicola McEwen (2005), and "Rethinking social policy through devolution" special issue of *Critical Social Policy* co-edited by Gerry Mooney, Gill Scott and Charlotte Williams (2006). See also Béland and Lecours 2005, and McEwen 2002.

cohesive society, a nation-state. It goes without saying that these research veins are ideologically charged. Whereas the Arusha Statement is an attempt to widen the World Bank's definition of social policy beyond welfare and protection into a measure of democratisation, due to the World Bank's inclination towards neoliberal agendas it is dubious whether this perspective will actually turn mainstream (Hall 2007). Now that I have contextualised the territorial turn and briefly sketched its empirical focuses, I turn to the theorisation of it.

National locking-in: Bounding for bonding

The territorial theorisation of social policy and welfare state development is led by Nicola McEwen and Luis Moreno, and Maurizio Ferrera, who integrate a geopolitical understanding as proposed by Stein Rokkan with an understanding of the social dimension of citizenship as proposed by Thomas Humphrey Marshall. The integration of the analytical lenses of nation-building and welfare (state) building, of an identity in common and social solidarity, has several implications for the study of social policy and welfare state development. Theoretically, it steers our attention away from the power resource perspective (very prevalent in the Swedish context) and towards a territorial perspective – although, and importantly, not in conflict with the power resource perspective. Rather, the power resource perspective is transformed from an independent into a dependent variable considered in its specific institutional context. Methodologically, it takes us beyond the state as a taken-for-granted entity of inquiry, prevalent within much welfare state development and social policy research, towards a state-centred approach considering political institutions and their historical legacies. This means that it considers welfare state development and social policy in the light of path-dependencies and formative moments (or critical junctures).

While Marshall's discussion of social citizenship goes back to a single pioneering article (Marshall 1950), the work of Rokkan is scattered in a large number of publications and working papers. However, these have been brought together into a cohesive theoretical framework by Peter Flora in collaboration with Stein Kuhnle and Derek Urwin (Flora et al. 1999). This 'synthesised' Rokkan theory is cited in the works by Moreno/McEwen and Ferrera, as well as in this book (as Rokkan 1999). Rokkan's and Marshall's ways of theorisation fit well together. However, they do not only fit well together, but also suffer from the same deficits.

Rokkan's model consists of four sequential phases and Marshall's of three sequential phases. Flora (1999: 84) has criticised this way of modelling with regard to Rokkan: "Although it was clear to him that an ideal-typical sequence of the four phases could only apply to the older nation-states of Western Europe, and then only approximately, he still insisted on the concept of 'phases'. In doing so, I believe he missed the opportunity to accentuate the *relationships* rather than the *sequence* of the basic processes." This criticism applies to Marshall's sequential approach too. The sequential description of the different dimensions of citizenship does not apply well to the actual developments, not even in Britain – the model country. The overlaps of the evolution of the political and social dimensions of citizenship, for instance, are usually significant and, in fact, in many countries the social dimension of citizenship evolved before the political. Above all, it is more interesting to consider the interdependence between the three dimensions of citizenship than their sequential development. Obviously, both Rokkan and Marshall were influenced by the understanding, dominant at the time, of modernisation as discussed in the Introduction. In the analysis below, the phases/dimensions are understood as parallel and interdependent processes instead of phases of development.

Moreno and McEwen's (2005) discussion of the territorial perspective on welfare state development and social policy constitutes the introductory chapter framing the volume *The territorial politics of welfare* which they have co-edited. Their discussion brings about enriching perspectives into the territorial analysis of social policy, proposing some general guidelines for the comprehension of the territorial dimension of social policy and the welfare state in comparative perspectives. Ferrera's (2005a, see also 2005b) discussion of the issue makes up a part of a consistent account presenting a theoretical framework as well as empirical analyses of welfare state building in historical perspective, and of processes of Europeanisation and devolution within contemporary European welfare states. Whereas my understanding is informed by Moreno and McEwen's discussion, in the following I draw on some aspects of Ferrera's conceptual discussion.

In a state-building perspective (à la Rokkan), European nation-building and state formation depend on two interdependent processes: external separation of land and people on the one hand, and internal consolidation on the other. The interdependence between *external closure* and *internal differentiation* is a key theoretical link in Rokkan's

framework²⁹. Also Marshall's account involved a double process: fusion and separation. *Fusion* refers to harmonisation of rights and obligation throughout the national territory, and *separation* to functional separation of state functions. This relation is what markedly separates Marshall's account from Rokkan's; whereas Marshall's account treats the external closure as taken for granted, in Rokkan's it is essential (Ferrera 2005a: 37-38). That is, whereas Marshall considered the sequential development of the civil, political and social dimensions of citizenship as mere internal features, in a state-building perspective these 'internal' features are understood against the backdrop of nation-building and state formation.

Moreover, in the state-building perspective (à la Rokkan), the nation-state is constituted by both a territorial space and a membership space. This means that both a territorial and a membership space pass through processes of external closure and internal differentiation. The *territorial space* identifies geographical reach and the *membership space* specifies criteria for insiderhood (Ferrera 2005a: 41). Whereas the *external closure* of the territorial space refers to the separation of states, the external closure of the membership space refers to the separation of insiders and outsiders. In a welfare state context, the closure of the membership space depends on 'who' questions such as: How far-reaching ought the new redistributive schemes to be? For which collectives ought the new sharing ties to be defined and introduced? (Ferrera 2005a: 46.) The *internal differentiation* within European welfare states was significantly shaped by the institutional context of formative moments and path-dependent processes (Ferrera 2005a: 48). In my interpretation, the external closure of the membership space has structured the access to social rights, whereas the internal differentiation has structured the social rights *per se*. Moreover, in my interpretation, the closure and differentiation of the membership space are intertwined with the internal differentiation of the territorial space. This means that the operational logic of societal membership is intertwined with the state structure as discussed in the introduction.

Citizenship demarcates a form of closure. Rokkan distinguishes between two kinds of rights prevalent in systems of democratic pluralism: rights to roots, and rights to options. In his model, Ferrera (2005a: 40)

²⁹ Whereas Ferrera (2005a: 21, footnote 13) coins the concept *bounded structuring* with reference to this interdependent process, I remain with Rokkan's terminology. In my view these are interrelated yet differentiated processes.

picks up these rights and integrates them with the three dimensions of citizenship as proposed by Marshall (1950): the civil, political and social dimensions. *Rights to roots* refer to rights to belong to a community whose boundaries (e.g. with regard to language of ethnic composition) do not necessarily match those of the wider community, and *rights to options* refer to rights to full membership within the wider community (Rokkan 1999: 170-173). The target of Rokkan's discussion is the tension between unitary and pluralistic territorial identity formations. This is related to centre formation and the differentiation of the membership space, and may with regard to claims-making be translated into a tension between universalism and particularism. Whereas Ferrera in his discussion of these issues overlooks the tension pointed out by Rokkan, in my view this tension is not only central: it also makes the integration of rights à la Rokkan with rights à la Marshall more relevant, explicitly taking state-building into account. In my interpretation, the differentiation of rights to roots and options affects the differentiation of civil, political and social rights. This means not only that the internal differentiation of rights to roots and options is intrinsic to the internal differentiation of civil, political and social rights, but also that these processes generally are interlinked with processes of nation-building and state formation.

Under analytical focus in Ferrera's book is welfare state formation as well as processes of devolution and Europeanisation within contemporary European welfare states. Ferrera (2005a) considers, on the one hand, the welfare state's capacities to prevent external authority structures from interfering with its social space and jurisdiction, and on the other hand, welfare-state capacities to 'lock in' and exercise command over actors and resources within the national territory. These capacities are understood to depend on the operation of bounding and bonding. *Bounding* refers to boundary-building in terms of spatial demarcations between territories and people, and *bonding* to the creation of a we-ness among insiders. Moreover, "internal bonding through external bounding" is understood to generate social solidarity.

Rokkan was influenced by the book *Exit, voice and loyalty* by Albert O. Hirschman. In his theoretical framework, Hirschman (1970) proposed two possible responses among members (or customers) to dissatisfaction with firms, organisations or states: exit and voice. *Exit* refers to withdrawal, and *voice* to agitation or protest from within. These responses interact with a third element, *loyalty*, which refers to a psychological

attachment increasing the cost of exit. In a state-building perspective, loyalty is generated by institutionalised practices that bond actors to one another in territorial and membership spaces. This means that bonding practices generate loyalty over time. Bonding practices may be the exercise of voice (i.e. political citizenship) or the experiences of material (e.g. through churches and schools) and non-material (e.g. through national symbols) sharing, and the involvement in these practices can be observed in actual behaviour (Ferrera 2005a: 36).

Hence, nation-building and state formation, and later also redistribution, imply a gradual foreclosure of exit options for actors and resources in a given context. Actors' participation in bonding practices is a predictor of loyalty of a given set of actors (Ferrera 2005a: 36). Greater voice/loyalty means greater closure and less exit, and this is how social rights may be understood as an institutional stabiliser that bonds individuals and groups together and with the state (Ferrera 2005a: 14). This stabilisation serves to anchor people's life chances to state functions such as the provision of social protection. Historically, solidarity and redistributive systems played a crucial role in stabilising the European political organisation. This is how bounding for bonding has worked to anchor people's life chances by weaving social rights into the fabric of citizenship, Ferrera argues (2005a: 45).

The creation of social rights involved closures of the membership space. As is well known from comparative social policy, these rights evolved differently in cross-national perspectives. In a discussion of membership definitions, Ferrera (2005a: 60) points out that a "first fundamental choice in the formation of modern welfare states concerned the reach of its schemes among the population: typically a 'who' question". This I have discussed above. He then raises the question: "What criteria of membership were to be chosen for pooling risks and enforcing sharing ties?" pointing to the possibility of reproducing, or alternatively redrawing, the boundaries cutting across social class and ethnic groups. As a major deficit, he leaves out boundaries across gender from the discussion – a boundary that not only divides most populations into two halves but also ranks them. Whereas the closure of membership space is delicate overall, the closure of social rights is particularly delicate due to its substantial nature. Below I consider how membership closure was negotiated with regard to class, ethnicity and gender in the Swedish context.

Whereas Ferrera is engaged in economic aspects of welfare, I am engaged in social aspects. Under focus in Ferrera's study are general social insurances such as sickness, unemployment insurances and, in particular, pension schemes. Whereas the establishment of compulsory social insurance entailed a nationalisation of redistribution, in many countries the internal differentiation remained based on categorical differentiation with a qualitative divide between social democratic and liberal welfare state regimes (Ferrera 2005a: 48). Under focus in this book are child caring and parenting. This means that the (non-) establishment of child caring services entailed a nationalisation of caring ideals (Kremer 2005); a normal biography with regard to giving and receiving care. As in the case of social insurances, in many countries the nationalisation of caring ideals and the establishment of a normal biography remained based on categorical differentiation, but in this case with a qualitative divide between weak and strong breadwinner welfare regimes (Lewis 1992). Below I consider how the caring ideal specific for the Swedish context evolved. The state-building perspective applied here implies that the contours of the normal biography are understood in the light of membership closure and differentiation; social policy is understood as filtered through the nation-state. Next, I discuss how this may be understood with regard to social policy involvement in the family.

Institutional structuring of hierarchical relations

Social policy involvement in child caring and parenting is connected with social policy involvement in the gender division of productive and reproductive work outside and inside the family. This means that social policy structuring of child caring and parenting is appropriately studied in a wider context and not as an isolated phenomenon. It also means that the institutional structuring of the life course with regard to child caring and parenting is hardly individual; rather, individual life courses congregate into *family life courses* with individual tracks. Such individual tracks are typically bearers of gender; whereas in some contexts the tripartite sequence of education–employment–pension is applicable for both men and women, in other contexts it is not so for women (Leisering 2003).

Daly (2000) has created an analytical framework for gender-sensitive analysis of the welfare state. As already mentioned, Daly distinguishes between the family as an institution that carries out certain functions and families as a set of social relations. The *family as an institution* refers to the

relation between the labour market and the family – how social policy shapes the activity of care outside and within the family. The *family as a set of relations* refers to the norms and practices that are embedded in social policy and what kind of familial relations these envisage (Daly 2000: 38-39).

The analytical framework includes three aspects. Daly (2000) underscores that it is important to differentiate between the *structures* of welfare states, the *processes* they set off, and their *outcomes*. Whereas conventional accounts of welfare state analyses tend to focus on welfare state structures and/or outcomes, most go blind on the processes they set off. The framework includes the following aspects (Daly 2000: 63-70): (i) conceptualising the relevant dimensions of welfare state provision, (ii) imagining the processes that are set in motion by welfare state arrangements, and (iii) modelling the outcomes that follow from these provisions. In the following, I outline the meanings of these aspects.

Conceptualising the relevant dimension of welfare state provision refers to the welfare state structures in terms of transfer/tax system and service provisions. These are fused into what she denotes distributive principles and are understood to treat different types of families differently. This implies that certain types of families are favoured in front of others, and is here understood as a normative structuring of the family life course. *Imagining the processes that are set in motion by welfare state arrangement* refers to processes of de/familisation and constructions of the maintenance of family members as public or private, and of care work as paid or unpaid. Whereas the former aspect of the analytical framework refers to relationships outside the family, i.e. the family-state relation, this aspect refers to relationships between men and women inside the family and how family members are made in/dependent of the family for their maintenance. *Modelling the outcomes that follow from welfare state provisions* refers to outcomes in terms of resource-based relations with regard to income inequality and poverty, and ‘incentive structures’ accounting for men’s women’s opportunities to participate or not in un/waged labour outside and inside the family. Social policy is understood to be involved in the expansion and contraction of opportunities for economic activity and economic independence among men and women. Whereas Daly argues that this reveals male and female roles envisaged by welfare states, the analyses in this book indicate that this is applicable with regard to intergenerational relations too. Intergenerational relations,

however, are not a topic in this part, but in Part III. Under empirical focus below is the institutional structuring of the gender division of labour market participation outside the family. I consider the conduct of child caring and parenting by looking at female labour market participation and the use of child care services. Hence I consider welfare state structures and outcomes in a gender-sensitive way as proposed by Daly. However, I treat processes rather differently compared with Daly. Whereas Daly considers processes of de/familisation within the family, I bring territorial management to the fore: I consider Swedish welfare state structuring of the 'normal' biography and processes of inclusion and exclusion with regard to social class, gender and ethnicity. Hence, whereas I let the understanding of process as proposed by Daly inform the analysis below, I do not carry out any analysis of processes of de/familisation *per se*.

National (individual and collective) life courses

Before continuing with the empirical passage of this part, I will briefly summarise the above discussion of the institutional structuring of the life course in territorial and critical perspective. The institutional structuring of the life course refers to a micro-macro link between social policy and everyday life. The *institutional structuring* is understood in a state-building perspective and to affect the family as an institution that carries out certain functions (the state-family relation) as a set of social relations within the family. The gender division of re/productive work outside and inside the family is understood as central to a gender-sensitive understanding of the life course structuration. This means that the gender division of both productive and reproductive roles, first between the state and family, and secondly between different family members, is central to an understanding of the individual tracks of the *family life course*. By way of this theoretical framework we may reach a gender-sensitive understanding of the normal, or Swedish, biography.

Swedish welfare structuring and structuration

Swedish social policies are extensive in two senses: they are far-reaching and all-embracing. I consider these aspects of social policy in a long historical perspective and as outcomes at the everyday level. The discussion focuses on three historical moments of institutional formation:

the state formation, the formation of (the Swedish type of) corporatist institutions, and the formation of the dual-earner family within the ideological framework of the People's Home.

State formation is a process interrelated with processes of nation-building and the consolidation of societal membership, and hence in the discussion on the Swedish institutional context I consider both the territorial and the membership spaces. In part, this discussion draws on an abstract model in a *longue durée* perspective developed by Stein Rokkan. Unity and estate representation stand out as characteristic features of Swedish state formation and membership consolidation, and the following discussion shows how these features translate into the Swedish type of corporatism. I consider the Swedish state structure first, focusing on the operational logic of voicing, and then how this logic responds to class, gender and ethnicity. The discussion on the formation of the dual-earner family focuses on how the Social Democratic Party was transformed from a workers' party into a 'people's party' embracing *all* citizens. This involves a focus on how Swedish social policies towards the end of the 1960s articulated a managerial optimism about everyday life, and I am particularly concerned with the formation of the dual-earner family as a 'normal' collective life course. The discussion considers taxation reforms and the provision of welfare services for this development. Overall, I am concerned with the involvement of social policy as a mechanism through which the Swedish nation has been formed and is being re-formed at the everyday level as well as the policy level.

Some remarks on the cited literature

The empirical discussions presented here draw on a limited number of key references. The discussion of Swedish state formation relies partly on a model developed by political scientist Stein Rokkan and revolves around four variables. Whereas Rokkan typically used his variables in order to generate (grand) 'conceptual maps of Europe' (for a critique see Tilly 1984: Chapter 8), in the analysis I do not seek to situate Sweden on such a map. Rather I consider how these variables may contribute to an understanding of the specific development in Sweden. This implies that the discussion is sensitive to empirically grounded variation beyond the (grand) maps presented by Rokkan. The model is published as a book chapter (Rokkan 1975), but also constitutes an integral part of the theoretical framework elaborated by Flora et al. (1999).

The second part relies on publications that provide empirically grounded analyses of the formation of the Swedish type of corporatism – the Swedish model. The cited researches have either explicitly applied a state-centred approach, or employed a method that allows the empirically grounded analyses to be interpreted within such an approach. Swedish political scientist Bo Rothstein has contributed considerably to the understanding of the Swedish welfare state from a state-centred approach, in particular through his cohesive works on the Swedish type of corporatism (Rothstein 1982, 1988, 1992*a*, 1992*b*, 1996)³⁰. In the discussion on the operational logic of the Swedish welfare state, I rely heavily on Rothstein's extensive analyses in *Den korporativa staten* which is the main contribution (Rothstein 1992*a*), but also on a couple of articles (Rothstein 1982, 1988) which are partly integrated into *Den korporativa staten*. In order to embroider the understanding of the operational logic to account for gender and ethnicity, I turn to the detailed work of three historians. For the gender perspective I primarily draw on Yvonne Hirdman's (1998) and Ylwa Waldemarsson's (2000) studies of women's positions within worker unions. Whereas Hirdman (1998: 409-417) has criticised class theory for being gender-blind, de los Reyes (2002: 38) has criticised Hirdman's gender analysis for being ethnic-blind. For the ethnic perspective, I bring in an analysis by Jesper Johansson (2005) of migrants position within the worker union. The analyses by Hirdman and Waldemarsson are integral parts of the same research project, and Waldemarsson's study is her dissertation project accomplished under the tuition of Hirdman. Needless to say, these analyses do not conflict with each other. Johansson's work is a book chapter that makes up a part of his licentiate thesis. In his analysis, he writes, he is inspired by Waldemarsson's study. In general, these works make up critical and descriptive historical work relying predominantly on archive materials. I also draw on an analysis by sociologist Carl-Ulrik Schierup.

The part on the formation of certain social policies within the ideological framework of the People's Home first pursues a discussion on waged work for all, drawing primarily on analysis of the Swedish model conducted by economists. The focus then shifts to the Swedish biography

³⁰ The book *The social democratic state* (1996) is basically a revised version of *Den korporativa staten* (1992*a*), but the Swedish version is more extensive than the English. Some main points of the analysis are presented in "Labor-market institutions and working-class strength" (1992*b*).

drawing on statistical data about female labour market participation and child care facilities. This section is partly drawn from literature and partly from various databases. The purpose of the statistical data is not to show exact figures, but to indicate *trends*. Because of this, I have not refrained from drawing (secondary) data from the literature, which one would avoid if the exact figures were important.

Understanding the Swedish institutional context

Cross-national comparisons of the institutional structuring of the life course indicate that life course structuration occurs with different capacity and in different (temporal and normative) patterns. The purpose of this section is to bring about an understanding of the context in which the Swedish institutional structuring occurs. The means and goals of structuring are understood to depend on how the state-citizen relation is consolidated. I consider this relation in a discussion of the Swedish territorial space and the Swedish membership space in a very *longue durée* perspective. The discussion points out the *unified centre-building* and the long tradition of *estate representation* as central to the consolidation of the Swedish state-citizen relationship.

Swedish territorial space

In his model, Rokkan (1975) proposes an abstract scheme, potentially useful across all regions of the world, combined with a series of regionally specific variables. The abstract scheme is argued to manage great institutional differences, leaving a great margin of imprecision. However, it may indeed be questioned whether it actually is useful across the world (cf. Tilly 1984: 129-131). The regional transpositions are argued to attain greater institutional specificity in a narrower regional range of comparison. Here I shall consider Swedish nation-building and state formation with regard to the regional transpositions. I do not seek to position Sweden on a conceptual map, but to consider the Swedish development from the geopolitical perspective these offer.

The model contains four phases (Rokkan 1975). Phase I covers the initial state-building process which, in Western Europe, is the period from the High Middle Ages to the French Revolution. This is a period of political, economic and cultural unification at the elite level, and it is in this period that the civil element of citizenship (à la Marshall) evolves.

Phase II brings larger and larger sectors of the masses into the systems. The conscription armies, the compulsory schools, and the emerging mass media create direct contact between the central elite and parochial populations of the peripheries, and generate widespread feelings of identity with the total political system. The establishment of vernacular languages plays a particular role in these processes. Rokkan (1975, 1999) emphasises the role of Johannes Gutenberg's (ca 1397-1468) invention of the printing machine and the spread of the printed word. This has been comprehensively analysed by Benedict Anderson (1991) who denotes it as *print capitalism*. Print capitalism refers to how the technical development of printing, in combination with the logic of capitalistic economy, contributed to the spread and establishment of vernacular languages, which in turn contributed to unite the masses into one people (see also e.g. Gellner 1983; Brubaker 1992). Frequently, but not necessarily, Rokkan (1975) writes, these processes generated conflicts with already established identities such as those built up through churches or peripheral linguistic groups.

Phase III brings these subject masses into active participation in the workings of the territorial political system. This typically happened through the establishment of privileges of opposition, the extension of the electorates for organs of representation, and the formation of organised parties for the mobilisation of support and the articulation and aggregation of demands. Obviously, the second and third phases picture how, in Marshallian terminology, the civil dimension of citizenship evolves. Rokkan's fourth and final phase represents further expansion of the administrative apparatus of the territorial state. Among other things, this includes the growth of agencies of redistribution, the building of public welfare services, the development of nationwide policies for the equalisation of economic conditions, negatively through progressive taxation, positively through transfers from the better-off strata to the poorer, from richer to backward regions. It corresponds to the Marshallian social dimension of citizenship. Due to the above-mentioned limitations of the sequential as well as the 'grand' approach, few states make a close fit with this model. However, Sweden fits in relatively well. Phase I manifests itself in Vasa's build-up of a central administration, phase II in the 1680s in systematic incorporation of Danish-Norwegian lands, phase III in 1866-1920 through a drawn-out participation crisis, and finally phase IV in the 1910s with a distribution crisis and the build-up of the welfare state

(Rokkan 1975: 573).

In his analysis, Rokkan (1975) underscores the strong parallels between England and Sweden in their stepwise developments, and between France and Denmark in their establishment of an absolutist rule and the upheaval of it. This has been opposed by, for instance, Knudsen and Rothstein (1994: 214), who argue that the upheaval in Denmark was peaceful and did not come close to the violent revolution in France. Nonetheless, in this context, it is interesting to note the divergent developments in Sweden and Denmark, and the similar developments in Sweden and England. Sweden was able to keep up its estate representation through most of the era of absolutism and moved very gradually towards mass democracy. Denmark, by contrast, was an absolute monarchy from 1660 to 1839, and then moved rapidly towards male suffrage in 1849. This means that, whereas the Swedish and Danish welfare states typically are united in the Social Democratic regime type (*à la* Esping-Andersen), they have emerged rather differently in a *longue durée* perspective. And whereas the welfare state in the British Isles is considered to deviate substantially from the Swedish, in the same long historical perspective both of these have developed in a smooth and stepwise way at the outskirts of Europe. With the purpose of clarifying the Swedish case beyond the prevalent divisions, as for instance proposed by Esping-Andersen (1990), I shall draw on Rokkan's model in more detail.

Rokkan (1975: 575) suggests that analyses of centre formation and periphery incorporation in Europe must start out from the six 'givens'. While these 'givens' combine to produce a variety of different configurations during the European state-building period, here I leave them aside. More importantly, four variables stood out as crucially important in the generation of different systems of territorial control: (i) the geopolitical distance northward from Rome, (ii) the geopolitical distance westward or eastward from the central belt of the trade route cities from Northern Italy to the areas controlled by the Hanseatic League, (iii) the concentration of landholdings and the consequent independence or dependence of the peasantry, and (iv) the ethnic basis of the early efforts of centre-building and the linguistic conditions for early or late consolidation (Rokkan 1975: 575-576). I intend to consider the Swedish institutional context focusing on these four variables. The first variable may be abbreviated to the north-south axis, and the second to the east-west axis. Whereas the *north-south* axis differentiates the conditions of

nation-building, the *west-east* axis differentiates conditions of *state-building* (Rokkan 1999: 144). The two remaining variables determine contrasts in the political development through the joint operation of two sets of cleavages: the opposition between the *primary* and *secondary sectors of the economy*, and the opposition between the *central nation-building* and *peripheral cultures* (Rokkan 1999: 321). In the following I let these four variables organise the text.

(i) *The geopolitical distance northward from Rome*. The break with the Roman Church in northern Europe brought about a fusion of secular and religious powers, particularly in Lutheran monarchies such as Sweden. Following this, in the north the state churches became agencies of nation-building, while in the south the Catholic Church retained its supraterritorial character and acted as a brake on efforts to build up national identities (Rokkan 1975: 581). Besides, and as already mentioned, the reformation involved a legitimising of the national vernacular standards as languages of both worship and statecraft. In Sweden, King Gustav Vasa (1496-1560, regent from 1523) played a key role for the later development by preparing for national state propaganda. In 1525, he transferred the printing office in Uppsala to the castle in Stockholm, and closed the printing office run by the church in Söderköping (Hall 2000: 33-36; also Rokkan 1999: 177). Thereby, he put an end to the war on the printed word between the 'state' and the church in Sweden. In addition, at the end of his regime Vasa created an office for history writing, which was the embryo of the state office (Hall 2000: 33-36). Hall suggests that the state-financed national history writing was uplifted to state religion during the Era of Great Powers (1611-1718) (*Stormaktstiden*) and influenced the national culture.

(ii) *The geopolitical distance westward or eastward from the central belt of the trade route cities from Northern Italy to the areas controlled by the Hanseatic League*. Rokkan's west-east variable goes back to Barrington Moore's (1966) classical analysis in *Social Origins of Dictatorship and Democracy* and reflects the levels of monetisation reached at the time of the consolidation of the territorial centres. In the west, England and France, this appeared in the sixteenth century, and in the east Prussia and Russia, in the seventeenth and eighteenth centuries (Rokkan 1999: 143). Initially Sweden comprised a low level of monetisation, but the level increased after 1660 through the conquests in the west. In Moore's words, Sweden was transformed from an eastern system to a western, and in

Rokkan's it was transformed from a landward to a seaward type after 1660 (Rokkan 1999: 143).

A central feature in Moore's analysis that Rokkan draws on is the integration of the rural and urban economy: The closer the ties of interaction and cooperation between the rural and the urban economic elites, the greater the chances for a successful transition to a full-suffrage competitive democracy, the greater the distance between the urban and the landed economies, and the greater the likelihood of an unchecked and unbalanced growth of the state and crisis in the transition to mass politics (Rokkan 1975: 586). In Sweden, as in Britain but in contrast to France and Denmark, the nobility was open to cooperation with both the monarchy and the bourgeoisie (see also Knudsen and Rothstein 1994: 205). From this it followed that the rural and urban interests in Sweden could be linked through the iron and copper mines (Rokkan 1975: 588). Rokkan (1975: 588) points out a possible parallel between the iron and copper mines in Sweden and the wool trade in Britain. Altogether, this means that from 1660 onwards Sweden embraced the necessary conditions for both state and nation-building.

(iii) The concentration of landholdings and the consequent independence or dependence of the peasantry. The control of the resources in the primary economy depends on the distribution of landholdings. Looking at northern Europe, England and Scotland were dominated by large estates. Sweden and particularly Norway had high proportions of small independent peasant holdings, although southern Sweden and Denmark also encompassed large and medium-size holdings (Rokkan 1975: 584-585). These variations had far-reaching implications in the phase of mass mobilisation and party formation (Rokkan 1999: 144-145).

Considering the developments of Conservative parties, in Britain the central culture was upheld and reinforced by a vast network of landed families, and in the Nordic countries by an essentially urban elite of officials and patricians (Rokkan 1999: 321). The British structure with large estates encouraged a gradual merger of rural and urban interests, and consequently the British Conservative Party was able to establish a unified front of landed and industrial owner interests. In Norway, Sweden and Denmark, the 'Right' remained essentially urban and proved unable to establish any durable alliance with the Agrarians or the 'Left' (Rokkan 1999: 321). This means that the broad masses of relatively independent peasantry could not be brought into alliances with the urban elites in

Scandinavia (Rokkan 1999: 332). Instead, they created an alliance with the workers. These processes have been extensively analysed within the thinking-realm of the power resource perspective. However, the broader state-oriented approach applied here sheds light on the prerequisites of this understanding, and why it fits so well to the Swedish case, as well as why it fits less well elsewhere (cf. the criticism discussed in the introduction with reference to Skocpol and Amenta 1986).

(iv) *The ethnic basis of the early efforts of centre-building and the linguistic conditions for early or late consolidation.* The final variable focuses the opposition between central nation-building and peripheral cultures. Here language is an important factor, and Sweden stands out as remarkably unified (Rokkan 1975: 581-582, 1999: 172): The territories acquired from Denmark and Norway during the Era of Great Powers (1611-1718), were successfully integrated into the national culture, and Finland, which was linguistically distinctive, was ceded in 1809. Since the conquest occurred before the introduction of compulsory mass education, there was no sudden imposition of a new language. Consequently, when people learned to read and write they learned the Swedish standard from the outset, and there was no sudden interruption of the language standard (Rokkan 1999: 177). The Sami and Finnish-speaking populations in Sweden were marginal, and have never mobilised any threat to the dominant position of the Swedish standard (Rokkan 1999: 175, 186, 196).

Looking at English and French, these were languages of core territories consolidated against the Empire. Though both were languages limited to a core territory surrounded by great variations in the peripheries, English and French were markedly different in their policies towards their peripheral languages. The English, having unified their core territory more thoroughly, were much more tolerant towards their peripheries than the French (Rokkan 1999: 178). The Scots, for instance, retained a wide range of distinctive institutions (Rokkan 1999: 189). In France, due to frustrations of a fragmented administrative structure, a violent wave of centralisation occurred. This brought about a forced imposition of the Île de France standard across the territory (Rokkan 1999: 178, cf. 1975: 583). The church played significantly different roles in different countries. In Sweden, the integration of the church and, subsequently, the schools of mass education into the apparatus of the state helped the unification. By contrast, in France, the linguistic unification was brought about primarily

by military and secular administrative agencies. The religious agencies were never built into the state machinery in France as they were in Sweden. This caused a protracted struggle between secular nation-builders and (cross-national) religious agents during the first phase of mass politics in France (Rokkan 1975: 583).

If we instead turn our attention to cultural unification and centre-building in the vast German-speaking areas of Europe, these were quite different. In Rokkan's (1975: 582-583, 1999: 179-180) view, what distinguishes the German trajectory, as well as the Italian, is that here linguistic and cultural unification took place several centuries before the territories were politically consolidated. That is, while in the cases discussed above, linguistic unification was a direct consequence of political centre-building, in the German case there was a stretched-out process of linguistic homogenisation within a decentralised network of elite interactions in the old imperial structures. Moreover, as German linguistic and cultural variations gradually merged, this occurred in opposition to the 'east' (the Slavs) and in rivalry for control of central European territories (the city-trade belt). The asymmetry between cultural unification and political consolidation has had far-reaching implications for German self-understanding and nationhood (Rokkan 1975: 582, 1999: 172). Rogers Brubaker (1992) has analysed these implications extensively in a comparative study of citizenship and nationhood in France and Germany.

Brubaker distinguishes between German *Volk*-centred³¹ and French state-centred³² nationhood. German national consciousness evolved before the emergence of the political idea of a state. This sequence of development has led to a German *Volk*-centred nationhood that is built up as an organic ethno-cultural community, instead of a bearer of universal political values as the French nationhood is. Brubaker suggests that difficulties in identifying the German nation with the institutional structure are due to their originating in different contexts – in Prussia and in Germany. "In France, the nation and political institutions were fused. In Germany nationhood was an ethnocultural fact; in France it was a

³¹ From here onwards I refer to *Volk*-centred and ethno-cultural nationhood as interchangeable.

³² From here onwards I refer to state-centred, civic, and republican nationhood as interchangeable.

political fact", Brubaker writes (1992: 4).

Brubaker further distinguishes between assimilationist and differentialist self-understanding. In France, the *assimilationist* self-understanding grew against the background of a gradual formation of the nation-state around a single political and cultural centre. This means that political inclusion has entailed cultural assimilation for regional minorities and immigrants alike (Brubaker 1992: 5). Drawing on the excellent work by Eugene Weber (1976), Brubaker (1992: 5) argues that the gradually increasing penetration into the periphery through the instruments and networks of the central state, such as schools, the army, administration and networks of transportation and communication, constituted the vehicle for the assimilationist self-understanding in France. Brubaker points out the opposition to the eastern Slavs as central to German self-understanding. Germany defined itself as a frontier state in European borderlands, and German self-understanding evolved in *opposition* to the Slavs. This has furnished a *differentialist* self-understanding, Brubaker argues. Hence, according to Brubaker's analysis, in Germany nationhood is ethno-cultural and self-understanding is differentialist, whereas in France nationhood is republican and self-understanding is assimilationist.

I will now sum up and clarify what we can learn from the above discussion about welfare state development in Sweden. In a Rokkanian understanding, the history of each territory is essentially the history of success or failure in the conflict between boundary-reduction and boundary-accentuation; bounding for bonding in Ferrera's terminology. Sweden was territorially consolidated at an early stage in history. By the time of the reformation, the church was integrated into the state machinery. This does not primarily mean that the church administrative machinery was integrated into a solid pre-existent state machinery, but that the state administrative machinery was considerably strengthened. This facilitated cultural and economic boundary-building. Sweden's geopolitical location at the outskirts of Europe minimised the interference from the city-trade belt and the Roman Catholic Church in boundary-building. From 1660 onwards, it was a seaward type of nation. This means that the level of monetisation rose and that economic boundary-building could advance. Protestant nationalisation and ethno-cultural homogeneity combined to advance cultural boundary-building. Landholdings were small, which was of significance in the transformation into mass politics, allowing for the outstanding – in a comparative

perspective – coalition between farmers and workers. In sum, the above discussion indicates that Swedish state formation and nation-building are characterised by boundary-building in a relative absence of counter-forces, which is not to say that there were no conflicts. This discussion is sketchy indeed, and the emphasis on it should not be overestimated. Yet in a comparative perspective and with focus on the four dimensions identified by Rokkan, the absence of counter-forces stands out as striking in the Swedish case. Having noted the nature of the territorial space, I now turn to the membership space.

Swedish membership space

"Distance from the city belt and Protestant nationalisation of the territorial culture facilitated external boundary-building and the control of *exit*, thus indirectly favouring the channelling of *voice* and with it the internal democratisation of the systems". According to Flora (1999: 31-32), this is one of Rokkan's main theses. It is precisely these processes that Ferrera (2005a) discusses as *bounding* (the separation of territories and of insiders and outsiders) and *bonding* (feelings of belonging among insiders). Moreover, Flora (1999: 32) continues, while the Protestant nationalisation of the territorial culture favoured the mobilisation of voice *from below*, first through the nationalisation of the church and then through early literacy, the continued dominance of the trans-territorial Roman Catholic Church favoured mobilisation *from above*. With reference to Ferrera, this is bonding from below, respectively from above. I will now translate this into a (tentative) discussion on nationhood.

In the case of Germany, the linguistic and ethno-cultural territory was not only distinct before the nation-state was consolidated; above all, it did not match the state territory. In France, the distinction of the linguistic and ethno-cultural territory was a direct consequence of nation-state consolidation, and consequently they matched. In Sweden, as in Germany, the linguistic and ethno-cultural territory was unified before the state was consolidated, but in contrast to Germany there was a relative match between the linguistic and ethno-cultural territory and the state territory. Altogether, this may explain why there has been no heyday of nationalism in Sweden. Moreover, it may explain why Swedish nationhood fits well to the description of an ethno-cultural, while Swedish self-understanding is better described as assimilationist. This makes Sweden a case of bounding and bonding through an ethno-cultural

nationhood and assimilationist self-understanding that are mobilised from below. It is against this background that we must consider the critical formation of Swedish welfare institutions. How these evolved is directly linked to the stretched-out development of state formation and nation-building sketched above. The establishment of corporatist bodies in Swedish modern politics is the topic of the subsequent section, yet I will allow myself to shed some 'territorial light' on the very initial formation of these bodies here. In doing so, I draw on analyses by Bo Rothstein who has studied this extensively.

In an article about the origins of Swedish corporatism, Rothstein (1988: 41) states that in Sweden the principle of corporatist representation was established before the principle of democratic representation. The working class was given representation in central bodies of civil service decades before the establishment of the right to vote, and the corporatist principle was implemented before the democratic. Thus, the Swedish institutional structure enabled voice *from below* before the critical moment of mass democratisation. Rothstein underscores that it was the 'workers' quest' that was in focus during the implementation of the corporatist institutions; the huge group of generally poor people was never in quest of representation, nor was the big group of small farmers until much later.

While the first official proposition to establish a corporatist body in the Swedish state apparatus was put forward already in 1888, the first implementation came much later in 1903, and at the local level instead of the national (Rothstein 1988: 30-33). From 1903 onwards, municipalities and cities started to open up employment agencies (*arbetsförmedlingar*) whose boards were constituted by fifty per cent workers and fifty per cent employers under the leadership of a neutral civil servant. Already by 1907, corporatist employment agencies could be found in all major cities. This development demarcates a difference from the development in other European and Scandinavian countries, where the employment agencies usually were under the control of either the unions or the employers and also became a matter of conflict between the two parties.

In Sweden, the idea of corporatist representation came into full effect after the establishment of the Board of Health and Social Welfare (*Socialstyrelsen*) in 1912 (Rothstein 1988: 33). This was the first permanent central corporatist organ, followed by the Pension Board (*Pensionsstyrelsen*) in 1913, and, a few years later, the Insurance Council (*Försäkringsrådet*) and the Work Council (*Arbetsrådet*) (both established

before 1920). The propositions to make these bodies corporatist did not cause any conflict in the parliament. Apparently, the idea of corporatist institutions easily and rapidly became generally accepted in Swedish politics (Rothstein 1988: 34, 43; see also Knudsen and Rothstein 1994: 212-213). Rothstein (1988: 41-42) points out that the conceived necessity of giving the working class representation within the political system resulted from how the working class was organised and the potential threat towards society that was conceived from these organisations. However, he disapproves of the general conception that the working class obtained influence through force. Instead, Rothstein (1988: 43) points out that neither the employees nor the employers were organised on a national level at the time when corporatism was first in question. He proposes that the pragmatism and consensus as well as the absence of serious conflicts, which are characteristic of Swedish politics during the post-war era, are based in the corporatist structure that was initiated already at the end of the nineteenth century. A corporate channel for workers' political voicing was opened early through the state administrative system, whereas the electorate channel for voicing was still closed (male suffrage in 1918, and general suffrage in 1921) (Rothstein 1988: 41).

The perspective sketched here suggests that the roots of the Swedish model can be traced in history. Sweden is pictured as a case of gradual state formation and nation-building in the absence of counter-forces and with a protracted estate representation. This *longue durée* perspective puts the introduction of corporatism, both in the initial phase at the turn of the last century and the institutionalisation of the 'Swedish model' after the Second World War, in a very reasonable light. For the sake of clarity, I want to point out that while the historical development is understood as an explanatory variable of the formation of Swedish corporatism, it is not understood to determine this development.

In a concluding remark on state-building in Scandinavia, Knudsen and Rothstein (1994: 218) picture the difference between Sweden and Denmark as cases of 'West Nordic' and 'East Nordic' traditions. These are strong words. In the case of Sweden, the lack of ethnic/cultural/linguistic conflicts, the nationalisation of the religion, the small size of landholdings combined with relative independence of the peasantry, and the monetisation after 1660, furnished an exceptionally unitary state formation. This far, I agree with Knudsen and Rothstein. However, to speak of an Eastern tradition bears with it connotations that have no

correspondence. In sharp contrast to the Eastern tradition, the development in Sweden enabled voices from below. If Eastern means hegemonic, in the Swedish case we see a peculiar hegemony coming from below, as well as from above. In fact, in the discussion of the Swedish type of corporatism below I shall bring up the contradictory notion of a 'hegemony from below'. In contrast to the Swedish case, the Danish expresses "a duality stemming from two very different heritages, on the one hand, a tradition of centralism dating from the absolutist era, and on the other, a heritage of individualism and popular self-reliance drawn from struggle against the strong state" (Knudsen and Rothstein 1994: 218). In Sweden we find a continuous absence of conflicts and a continuous representative rule, first through a protracted rule of estates and later through institutionalised corporatism and representative democracy. This may be understood to have shaped what we can call the Swedish 'political knowledge', i.e. a generalised knowledge about how politics should be conducted. The Swedish political knowledge is sometimes denoted a 'culture of consensus', a notion I return to below.

The advantage of a broad approach such as the historical-geopolitical institutionalism applied here is that it manages to explain the differences within the Scandinavian model and similarities beyond it, which for instance the power resource approach does not (cf. Knudsen and Rothstein 1994: footnote 62). Here, the power resource perspective is a valuable perspective adding knowledge, but it is limited to one dimension in a multidimensional analysis, a dependent variable. I now leave the discussion on the characteristics of Swedish state formation and nation-building, and turn to Swedish corporatism. The peculiarities of Swedish corporatism are understood to premise the coming heyday of the Swedish welfare state under the programmatic declaration of the 'People's Home' (*Folkhemmet*), which is discussed in the next following section.

The Swedish model: A case of path-dependent corporatism

The Swedish model is characterised by a close collaboration between employers, employees and the state. Representatives of employers' and employees' organisations negotiate at the national level and reach collective agreements that include, in principle, all employers and employees. Doing politics through centralised negotiations between the state and organisations is generally depicted as *corporatism*. Negotiations are intrinsic to capitalism. In a clarifying discussion (partly relying on

ideas developed by Johan P. Olsen), Rothstein (1992a: 34) states that while in pure capitalism these occur between individuals, in extreme corporatism they occur between the state and organisations. Thus, he argues, it is within the state and the logics and principles of organisation – not in the occurrence of negotiations and the contracts between opposite interests – that we must look for the peculiarities of corporatism.

In a discussion of the perception of how politics should be done (what I would call ‘political knowledge’), Rothstein (1992a: Chapter 2) connects corporatism with reformism. He argues that *how* politics is done, for instance by way of corporative structures, has an effect on *what* politics is pursued. This means that the implemented policies, in part, are framed by the implementation itself, and that this may be understood as a trade-off process. Of relevance here is that Swedish state capacity is connected with the operational logic of the Swedish type of corporatism, and that this accommodates reformism (Rothstein 1992a: 31-32, 80).

The administrative structures of implementation are under particular focus in Rothstein’s framework. He argues that the variation of the *administrative structure* is an explanatory variable of cross-national variations of corporatism (Rothstein 1992a: Chapter 4). Relying on the example of Swedish unemployment insurance, i.e. the Ghent system, Rothstein (1992a: Chapter 10) illustrates the Swedish administrative corporatism. In Sweden, the characteristics of the Ghent system have become significant through the specific corporative administrative structure that Swedish labour legislation has accomplished. In principle, this means that the laws regulating labour are formulated so that the right of the individual employee toward the employer is voiced through *individual membership* in the workers’ union (Rothstein 1992a: 329). With the purpose of showing the operational logic of this corporative administration, Rothstein (1992a: Chapter 17) takes the example of the Swedish Employers’ Confederation (*Svenska arbetsgivareföreningen*). This logic has implications for the citizen’s voice, and below I first consider the Swedish administrative corporatism and the operational logic of this with regard to voicing. Secondly, I consider how this logic operates differently towards different segments of the citizenry.

The operational logic of ‘voicing’

Whereas the roots of the Swedish type of corporatism may be traced back to the end of the nineteenth century, it was not until the 1930s that the

Swedish type of corporatism really settled in. Generally, the 1930s is considered to constitute a break in Swedish politics – the decade when the much-discussed class coalition between the workers and farmers came about. The coalition brought about a majority in parliament in 1933, which is usually depicted as decisive for the political arrangement that occurred between the workers' and employers' organisations in 1938. While the arrangement from 1933 set the relationship between the state and the organisations, the arrangement from 1938 set the rules for labour market policies. In addition, the arrangement from 1938 constitutes the final settlement of both the 'Swedish model' and the 'collectivistic notion of democracy'.

Rothstein (1992a: Chapter 6) reassesses these well-known political moments from the perspective of historical institutionalism. In opposition to what was previously known, he shows that the *formative moment* of the Swedish model occurred before 1933, in 1932 and under a conservative government instead of a Social Democratic. Due to uncontrolled milk prices, the *principle of collectivism* in Swedish politics was introduced. A *mandatory* membership payment among *all* farmers to the national farmer organisation (*Bondeförbundet*), which was regulating the milk price, was enacted. When the political right wing proposed that an organisation should have the right to demand membership payments for both members and non-members, they went much further than the Social Democrats had ever proposed with regard to the workers' unions. Hence, Rothstein argues, already in 1932 the organisations of the working and farming classes (i.e. the worker unions and the farmer organisation) merged through an interest in common with regard to *organised* class interests. Thus, instead of reducing the political agreement from 1933 to a 'simple horse trade', Rothstein proposes that it should be understood in the light of its wider institutional context and the workers' and farmers' joint concession with regard to the *relation between the state and interest organisations* affiliated with respective political parties. The 1933 agreement said that the worker unions and the farmer organisation should be strengthened through a strong influence on both politics and their implementation in respective areas of interest. Consequently, the politics were oriented towards what the representatives of the worker unions and farmers' organisation claimed was the organised class-interest. This in turn resulted in top rates of membership in both the farmers' organisation and the worker unions (Rothstein 1992a: Chapter 6, see also 1992b).

However, considering the *operational logic* of the corporative administration, the question whether the representatives of the interest organisations voice the organisations' interest within the state, or whether they voice the state's interest within their organisations, becomes central. For this purpose, Rothstein turns his analytical focus to the Swedish Employers' Confederation (*Svenska Arbetsgivarförbundet*) during the period 1974-83. In this period the Confederation had representatives in five governmental bodies. He shows that there is a discrepancy between the official policy of the Confederation and the policy practised by the representatives in governmental bodies. Instead of a more restrained budgetary line consistent with the official opinion of the Confederation (and the conservative government), the representatives adopted a generous attitude towards public money spending (Rothstein 1992a: 335). This result was consistent also under the conservative government 1978-82 (!). In his conclusion, Rothstein takes up causal links at the individual, organisational, and societal levels. Overall, he concludes that corporatist administration seems to foster representatives in the interest of the state, but that the interest organisations get something in return (Rothstein 1992a: Chapter 17). This conclusion can be related to the above discussion on a 'hegemony from below'. Whereas an assimilationist feature of the Swedish state structure is present through the state's representation in the organisations, the 'voice from below' can be identified in the organisation's representation in governmental bodies. It is worthwhile to point out that Rothstein (1992a: 345) in his final commentaries concluded that the Social Democrats not only gained legitimacy through their corporatist solutions, but also implemented these with the purpose of gaining legitimacy. In fact, Rothstein pays more attention to political agency than I have mirrored here. He argues that individual political agency may change the institutional development, perhaps not beyond, but to, the margins of existing institutional settings (see also discussion in Rothstein 1992b).

The Swedish type of corporatism described here has diminished since the early 1990s (Rothstein and Bergström 1999). Nevertheless, given that the interest here is in the political institutions as they were at the time when Swedish welfare structures were shaped, Rothstein's analytical penetration into the Swedish type of corporatism is relevant. The operational logic of the Swedish corporatist structure has had considerable influence on Swedish welfare institutions. As I will show, it serves to cast

light on Swedish bounding for bonding in the heyday of the Swedish welfare state: first in that citizens were involved in this process through individual membership in interest organisations, and secondly through the generalised idea that the state had a 'social responsibility' towards its citizens. In contrast to most countries, Swedish nationhood has been characterised by trust and a belief that the state is good for its citizens (though this trust seems to have diminished in the wake of diminished corporatism; see Rothstein and Bergström 1999). This arrangement has had effects on the relationship between the Swedish state and its citizens, and on welfare as a normative concept. I now proceed to discuss how this operational logic has played out towards women and migrants.

(Un)equal voicing

Swedish corporatism did not distribute political resources equally. On the contrary, groups and interest organisations disconnected with the core political infrastructure of the corporatist administration were marginalised. I shall consider some empirical research exemplifying consequences of the perspectives that Rothstein's analytical penetration furnishes us with. For the purpose of this analysis, I consider hierarchical structures of relevance for two categories diverging from the norm of the Swedish male worker characteristic of the political infrastructure: non-Swedes and non-male. I focus primarily on the structures for voice within the established political infrastructure, namely within the unions, but also through interest organisations outside the core political infrastructure.

Generally, the Swedish Trade Union Confederation has celebrated unity and avoided the organisation of special or separate interests within the confederation. In spite of this, special groups centred on 'women's demands' and 'migrants' demands' have occurred also within the confederation. The Women's Committee (*Arbetsmarknadens Kvinnonämnd*) was in force during 1951-1976 and was established jointly by the Swedish Trade Union Confederation and the Swedish Employers' Confederation. The Women's Council (*Kvinnorådet*) was established in 1946 inside the Swedish Trade Union Confederation. In 1967 it was replaced by the Family Council (*Familjerådet*). While Yvonne Hirdman (1998) has illuminated some implications of the special organisation of women's demands in the Women's Committee and the Family Council, Ylva Waldemarsson (2000) has studied the Women's Council with analytical focus explicitly on the *designation* of women within the

confederation. Jesper Johansson (2005), partly inspired by Waldemarsson, has discussed some consequences of the special organisation of migrants' demands within the confederation.

The Women's Council was introduced to make 'real' members of the female members. The intention was to involve women in mainstream union activity – not to change the mainstream. In this way, Waldemarsson (2000: 136-141) argues, the Women's Council contributed to the cementation of women as odd and subordinated. The council strove to transform female union members into knowing and active members and responsible workers, but not to change the male norm. The reluctance prevalent among some female union members towards this 'transformation' was grounded in an understanding that the responsibility as a wife and mother and that as a worker stood in conflict with each other. Some argued that the responsibility as a wife and mother was superior, and others, in accordance with union mainstream thinking, that waged labour was superior. Overall, Waldemarsson's analysis highlights that the Women's Council voiced the confederation's interest towards female union members, but that something was gained in return in that the women's demands became integrated into the mainstream agenda. In 1967, the Women's Council took the consequences of the obvious causal link between *special* organisation and *subordination* and dissolved itself. It was replaced by the Family Council which included both male and female members. As a result, both women and women's demands were downplayed (Hirdman 1998). Approaching the issue from another angle, this picture is confirmed by Ingela K. Naumann (2005), who has compared the women's movement and child care developments in West Germany and Sweden in the 1960s and 1970s. Naumann's analysis indicates that certain welfare states did not become 'woman-friendly' because of certain feminist activism, but because certain state structures accommodated 'woman-friendly' politics.

In her analysis of the debate within the confederation on gender equality, Hirdman (1998) identifies an *ideological shift* in the debate in 1967. This 'ideological shift' in the debate was, however, not constrained to the confederation, or even to Sweden. Instead, as Naumann's comparative analysis illuminates, the Swedish state structure constituted an excellent growing ground for the emergent 'ideology'. In Swedish mainstream politics, this manifested itself as *family policing*. While the Women's Council may be understood to have voiced women's interests

within the confederation as Waldemarsson argues, I am inclined to emphasise that this was possible in part because this specific voicing could be accommodated within the Confederation. This means considering the institutional setting as a contextual premise for this 'accomplishment'. While for the moment I turn my attention to migrants' voice, I shall return to family policing in the discussion of 'The People's Home' below.

Analysing the 'integration ideology' within the Swedish Trade Union Confederation, Johansson (2005) shows that with the exception of language teaching, compensatory and particular solutions for labour migrants were not considered initially. Instead, 'immigrant issues' were handled within the established political infrastructure. However, in the 1960s immigrants began to be conceptualised as a 'social problem' in the debate and after 1970 a duality in the confederation's official policy occurred, Johansson (2005: 82) argues. On the one hand, the organisation of the nationally based class interest remained intact, but on the other hand an extraordinary administrative logic of immigrant issues was institutionalised through the introduction of Immigrant Councils (*Invandrarråd*) at the central level, and Immigrant Committees (*Invandrarkommittéer*) and Immigrant Advisors (*Invandraransvariga*) at the regional and local levels (Johansson 2005: 82). Mulinari and Neergaard (2004), in an analysis of the Swedish Trade Union Confederation and trade union active migrants, have denoted this inclusion of migrants as *inclusive subordination*. This means that, as in the case of women, immigrants' demands were treated as special demands and not as an integral part of the agenda of the union. Hence they did not become an integral part of the general agenda, but special issues handled in special subordinate councils and committees within the union (Johansson 2005: 82-83, 87-88).

This development fits into a wider context. In Sweden, an immigration policy was set up in the early 1970s. Hammar (1985: 18-19) has argued that this represented a desire to treat resident foreigners and their families as *immigrants* rather than simply as manpower. In Sweden, immigrants are organised in organisations corresponding to narrowly defined ethnicities, such as Turks, Finns or Kurds. The state supports certain 'national alliances' (*riksförbund*) of these 'ethnic organisations' through state subsidy. This means that the Swedish state is involved in the structuring of 'ethnic organisations', and Schierup (1991) discusses some consequences

of this³³. Emphasising that the 'national alliances' must not only work in accordance with Swedish Integration Policy, but also prove to be non-religious and non-political to be eligible for subsidy, he argues (1991a: 119-121) that the arrangement results in a 'political socialisation' through an 'ethnisation' and de-politicisation of immigrant organisations. "As processed through the corporate state, Swedish multiculturalism can be described as giving rise to a dual policy of standardization/assimilation on the one hand and of 'ethnization' on the other", Schierup (1991: 121) writes. This can easily be translated into a variation on the 'hegemony from below': while the hegemony can be seen in the state influence within ethnic organisations, 'voice from below' is restrained to voicing only 'ethnicity'.

In sum, this suggests that certain geopolitical circumstances have opened up for a peculiar hegemonic institutional setting. This has enabled extraordinary far-reaching welfare programs to be formulated and implemented in the interest of the nation-state. In the next section I shall consider some aspects of these, focusing on the People's Home in general, and on family policies from the 1970s in particular. Yvonne Hirdman (1989) has provided us with one of the most debated analyses of hegemonic power in Swedish social policies. This work has on several grounds been criticised by, among others, Rothstein (e.g. 1998: Chapter 7), but not even Rothstein (1998: 181) denies that "ideological tendencies of the type identified by Hirdman have characterised other social policies, especially those planned and implemented at a late date, that is, public child care, or the means-tested and treatment-oriented social assistance program. A strong planning and managerial optimism, which could indeed take a rather paternalistic form, emerged within welfare policy in the late 1960s".

The People's Home

The programmatic declaration of the 'People's Home' has had a pervasive influence on the Swedish welfare state. While as a rhetorical notion it has a right-wing origin, it is most associated with Social Democratic

³³ Today the context is different from when Schierup conducted his inquiry (the regulations and the governmental body in charge, for instance, have changed). Even so, a hasty look into the regulation of state subsidy for ethnic organisations (Integrationsverket 2006) suggests that the changes are superficial.

reformism. I consider how the workers' party was (metaphorically) transformed into a 'People's Party', and some implications of the People's Home – a home for *all* – for the Swedish normal biography and the normative conceptualisation of child caring and parenting within this.

From the Workers' to the People's Party

Hallberg and Jonsson (1996) have analysed the rhetoric of the People's Home in the political debates from the 1910s to the 1930s. Political scientist and right-wing politician Rudolf Kjellén argued that the (Swedish) people should unite in the interest of the nation – the People's Home. Referring to an organic and consensual conceptualisation of society, he argued that each class had its role to fulfil and should cooperate in the interest of the nation (Hallberg and Jonsson 1996: 155-161; cf. Larsson 1994: 63-65). In his younger years, Per Albin Hansson argued against this view, emphasising class conflicts and the particular interests of the working class. However, later in life, when he had also become the leader of the Social Democrats, he adopted the notion of the 'People's Home'. Hallberg and Jonsson argue that this adoption occurred along with an ideological shift within the worker's party. The class conflict became subordinated to the nation and the workers' party was (metaphorically) transformed into a 'People's Party' embracing *all* individuals across class belongings. This also means that the workers' party's conceptualisation of society as based on class conflicts was altered by a conceptualisation of society as an organic unity geared by consensual interests (Hallberg and Jonsson 1996: 173; cf. Larsson 1994: 214). While this shift is a process stretched out over time, a certain speech by Per Albin Hansson in 1928, in which he conflates the 'home' with nationalism and socialism, demarcates the shift markedly. In Hallberg and Jonsson's (1996: 173) interpretation, liberal duties were conflated with socialist ideology, and they suggest that the shift constitutes a merger of the conceptualisations of society as formulated by the workers' party and right-wing politicians, as well as a prerequisite for the political agreement in 1933. This understanding strengthens Rothstein's argument that the coalition formation in 1933 should not be reduced to the specific coalition agreement, but should rather be considered in its wider institutional context. The organic-consensual conceptualisation of society immanent in the People's Home has had a tremendous impact on social policies formulated both during the heyday and in the wake of the People's Home,

and with regard to both labour market participation and the provision of social services.

Waged employment for all

While the labour force is of constant concern for the Swedish Trade Union Confederation, towards the end of the 1960s a shift occurred in how it was debated. The shift is related to changes in the wider societal context including a conceptualisation of economic and social policies as instruments for the adaptation of individuals, and, as a consequence, identifications and problematisations of 'deviant' individuals. This means several things. First of all, while the managerial conceptualisation of economic and social policies as instruments for the adaptation of individuals was already prevalent as an idea, towards the end of the 1960s it came into political practice. Second, labour market needs and demands were discussed in the light of this development. What we see is a certain trade-off between the Swedish type of corporatism and Social Democratic political goals. Wittrock (2004: 54) has formulated it thus: the Social Democratic Party did "not only represent large parts of society, it has also shaped a society in its own image and created a logic of needs and demands in terms of employment and public consumption patterns". With regard to the theoretical framework applied here, this means that towards the end of the 1960s Swedish political institutions accomplished a structuring of the life course which both generated a 'normal biography' (bonding) and made deviations identifiable and debatable (bounding).

Economic growth is a general objective of any welfare state. Whereas Keynesianism has set this agenda in most welfare states, in Sweden the Rehn-Meidner model played this role. The model, first presented by Gösta Rehn and Rudolf Meidner in 1951, has had a strong influence on Swedish economic and wage policy during the 'golden age' from the late 1950s until the oil crisis. Besides economic growth, the model centres on full employment, low inflation and salary equalisation (see e.g. Erixson 2001). Important to the discussion here is the central role of an *active labour market policy*. Whereas Swedish active labour market policy may be traced to the end of the nineteenth century (Wadensjö 2001), in the 1940s labour shortages turned into a major concern in the political debate, and an active labour market policy at the national level became central in controlling this (un)employment. The Rehn-Meidner model accommodated this active labour market policy (Erixson 2001).

Along with economic growth and industrial expansion, the Swedish labour market suffered from labour shortage from the Second World War until the oil crisis in the 1970s. On the whole, the period is dominated by economic growth, though there were some minor economic turndowns, for instance in 1965/66. The labour shortage was debated in relation to potential *labour reserves*: migrants, women, handicapped and elderly. After the Second World War, Swedish immigration policies went through a stepwise liberalisation and the labour shortage was supplied by labour migrants. In spite of this, the interest for the married women grew in the 1940s and 1950s and for the mothers of small children in the 1960s. Hence, the labour shortage was the most important issue for the integration of housework and child care into the union agenda (Waldermarsson 2000: 107).

Labour immigration increased after 1945 with a peak in 1969/70. The increase was more marked after the introduction of the new aliens' act in 1954, which permitted *spontaneous immigration* (Lundh and Ohlsson 1994: 72-77). By the mid-1960s, 'immigrants' began to be debated as a problem. The trade unions argued that immigrants were exploited by employers; they were recruited to low-wage branches, jeopardising the equalisation wage policy, and they were disadvantaged in the housing market. It was argued that the segregation in the labour market and housing market could lead to unwanted conflicts between the Swedish and the immigrated population. In 1964, the Swedish Trade Union Confederation demanded that immigration be regulated, and in 1965 the government issued a decree restricting labour immigration from non-Nordic countries. Since the decree did not have the wanted effect, it was sharpened in 1967 (Lundh and Ohlsson 1994: 78-83; Kyle 1979: 204). The new system of *regulated immigration* implied that non-Nordic labourers must obtain a working permit before entering Sweden. This occurred by way of controlled labour recruitments with union consent. As a result, immigration from Finland dominated the immigration peak reached in the following years. Immigration from Yugoslavia constituted the second largest immigrant group in Sweden at the time. In connection with the economic recession in 1971/72, the Swedish Trade Union Confederation demanded that all local unions deny further labour immigration, and thereafter the non-Nordic labour immigration ceased (Lundh and Ohlsson 1994: 84; Hammar 1988, ref. in 1999a).

Since the Swedish Trade Union Confederation had a strong influence

on the labour immigration, it is interesting to consider what it was that caused the confederation to change their attitude. While Lundh and Ohlsson, studying immigration, emphasise the *immigrants*, Hirdman studying gender relations emphasises *gender equality*. Lundh and Ohlsson (1994: 79-81) argue that the changeover was due to changes among the immigrants in the first half of the 1960s. First of all, immigration increased markedly during this period. Secondly, immigration from non-Nordic countries such as Yugoslavia, Greece, and Turkey increased. In 1964 the trade unions argued that the spontaneous immigration led to 'foreigner slums' in major cities, and they demanded that immigration be controlled. In connection with the economic downturn in 1965/66 the situation worsened. A couple of thousand Yugoslavs were then residing in temporary housings, and three thousand foreigners were unemployed. Lundh and Ohlsson argue that these *conditions* served as background to the negotiations leading up to the decree in 1965 regulating non-Nordic immigration. By contrast, Hirdman (1998: Chapter 4-6) argues that the changeover was due to changes in the *ideology* of gender equality. This ideology changed markedly over the years 1961-1976 beginning with what she calls the 'housewife contract' and ending with the 'equality contract'. While the debate until 1967 was characterised by *economic reasoning* putting the labour market and the interest of the nation at the fore, after 1967 *equality* came to the fore (Hirdman 1998: 282-283). In 1964 women became an apparent labour reserve that was not only cheaper than immigrated labour, but was already supplied with housing. Hirdman points out how this economic reasoning matched layers of hostility towards foreigners within the trade union seeking to stop 'foreign' labour from entering the country (Hirdman 1998: 193-194). In 1967 a reasoning that emphasised equality and solidarity, and what was 'best for the women', altered the economic reasoning.

To both Lundh and Ohlsson (1994) and Hirdman (1998), 1967 signifies a *shift*. To Lundh and Ohlsson it is a *system* shift from spontaneous immigration to regulated immigration, and to Hirdman an *ideological* shift from economic reasoning to a reasoning validating equality. Most probably, what Lundh and Ohlsson as well as Hirdman present us with are fragments of a larger and more complex societal 'shift'. What we see after this shift is diminished labour immigration (from non-Nordic countries) and increased female labour market participation. In the political debate, women replaced migrants as the most 'suitable labour

reserve', and within the Confederation the Family Council replaced the Women's Council (at the initiative of the Women's Council). This means that *family policy* was established with the *family* as its specified target. The creation of day care facilities, individual taxation, and changed gender relations (the equality contract in Hirdman's vocabulary) are core policy areas of family policies. These policies served to structure the family both as an institution and as a set of social relations.

The 'Swedish' biography

When gender equality was integrated into the political agenda of the confederation, 'freedom of choice' was deliberately ruled out (Hirdman 1998: 250-253). The women were not to be obliged to enter the labour market, but the incentives to do so should be strong. The intended structuring had a good effect: the women entered waged labour. Between 1950 and 1990 female labour participation increased from 800,000 to 2,100,000 women (Hirdman 1998: 284). After 1990 it decreased due to economic crisis and high unemployment (SCB 2005: 7). The proportional difference between the female and the male labour force decreased considerably until 1993, but thereafter it has increased slightly (SCB 2005: 7). In 2004 the Swedish labour force consisted of 2 027 000 women and 2 186 000 men. This means that 75.7% of all women and 79.7% of all men aged 16-64 participated in the labour force, and that 5.1% of women and 5.9% of men as a percentage of the labour force were unemployed (SCB 2007). These are noteworthy figures indicating a considerable re-patterning of the temporal sequences of the education-employment-old age tripartite among women. Quite obviously, this has huge implications for the social roles of mothers, wives, and waged workers among women, but it also affects men and children. The core policy areas of public child care, taxation, and changed gender relations served this structuring in a conflated way.

Public day care for pre-school children became a parliamentary issue from the 1940s. From 1943 to 1970 the governmental grants for public day care increased from SEK 0.1 million to 77 million. The number of places within public day care facilities increased insignificantly during the 1950s, but between 1965-1970 they multiplied by three. In 1970 there were about 65 000 day care places for children under seven years, approximately divided half-half between public day care and municipal family day care (Kyle 1979: 191). In the next five years the number of

places more than doubled to 133 598 places. By 2006 the number of places had expanded to include 424 092 children under the age of six (Skolverket 2006). This comprises 96.8% of all four and five years old, 93.6% of all three years old, 89.7 of all two years old, and 46.9% of all children one year old (Skolverket 2006).

Day care for pre-school children can be viewed as an incentive either to 'free' women or to foster the children under pedagogic control. In the early years (1946-1961) the attitude was rather pragmatic. Later on, the issue was transformed from a women's issue into a societal issue and even a labour market issue (Hirdman 1998: 128, 253). Thereby day care was integrated into trade union core activities. In 1966 day care was discussed at a confederation congress for the first time. The congress decided that the confederation should put pressure on the state to extend day care facilities, and that public day care was the preferred type of facility (Hirdman 1998: 254). This can be seen in figures as well. Whereas in 1970 day care was divided equally between public day care and municipal family day care, by 2004 the municipal family care had ceased to constitute less than one tenth of those in the public day care (Skolverket 2006). At the congress in 1971, this political development was extended and day care was debated as involving factors of 'social equalisation'. This included socialisation and socialist fostering of the masses (Hirdman 1998: 270, 272). A few years later, by the congress in 1976, a lot had been accomplished – not only public day care facilities which were under construction, but also sickness insurance for the caring of sick children and parental leave. To this was added individual taxation.

The principle of family taxation is based on a breadwinner family model. This was introduced in Sweden in the 1920s (Hirdman 1998: 92). During the 1960s family taxation was debated intensively. Nevertheless, in 1964 the minister of financial affairs, Gunnar Sträng, decided to leave the family taxation unchanged. Instead, he initiated an investigation on the subject that lasted for five years. Finally, in 1969 individual taxation was proposed to the government and it was accepted in 1970 and implemented in 1971 (Lundqvist 2006: 223, 227). Since individual taxation increases the total family income to a higher extent than what family taxation does, it is a stronger incentive for married women to enter waged labour, which family taxation is not.

The policing of families had full effect. Women entered the labour market to a considerably higher degree than before; the dual-breadwinner

family was established as a norm. A main point in both Hirdman's and Waldemarsson's analyses is that this happened in accordance with class interests and a male norm subordinating feminist interests and a female norm (i.e. the feminism-Marxism paradox). In contrast to this, Kyle (1979: 228) concludes that while women's *right* to a work was acknowledged, it was obvious that this right was formulated in relation to labour-marked demands rather than women's demands. This means that women's right to work was never a political goal superior to other goals, but rather one aspect of a larger and complex development.

The view taken here emphasises the institutional structuring of the normal biography as dependent on the state structure and how this evolves. This takes us back to the above discussion on the relation between Social Democratic reformism and the Swedish type of corporatism. Towards the end of the 1960s the Swedish model flourished, the economy saw no bottom, and the managerial optimism prospered. From this perspective, it is not so much a question of political goals as of political capacity. Social Democratic reformism reached a peak that, in combination with the political influences and social movements at the time, generated a state border closure and the integration of women into the national labour market. The incentives for women to enter the labour market were created through policy instruments such as individual taxation legislation and state-financed construction of day care facilities, as well as the proclamation of a new gender contract, as Hirdman denotes it (cf. Daly 2000: 67).

Bordered and bounded welfare

The Swedish welfare state is far-reaching and all-inclusive – within certain limits. While equality and solidarity have been guiding ideals in the construction of the universal welfare state, these have been constrained by borders and boundaries. The perspective taken here shows how the initiation of policies targeted towards the family occurred in relation to labour market considerations. This implies that the borders and boundaries of welfare coincide with those of the labour market. Borders are real, and in the discussion below I pay attention to the *national(ising)* labour market.

The gender division of labour market participation tends to have a pervasive influence on the family, both as an institution expected to perform certain services and as a set of social relations. However, whereas a gender segregation of (waged) productive and (unwaged) reproductive work typically implies unequal intra-familial social relations, an equal division of productive work does not necessarily imply equal division of reproductive work or of equal gender relations. As a second step of the discussion below, I consider the 'Swedish' way of life and some implications of this.

A national labour market

Immigration to Sweden is regulated through the Aliens' Act. This act entails a wide margin of imprecision enabling a great deal of interpretation. In practice this has meant that immigration policies to a considerable extent have evolved as *ad hoc* solutions under the influence of trade unions (Kyle 1979; Lundh and Ohlsson 1994; Hammar 1999a). Hence, immigration policy has been influenced significantly by union considerations of labour market needs and demands.

Due to economic growth and labour shortage, the borders opened successively after 1945; but from the mid-1960s decrees regulating labour migration in a selective way were issued due to economic recession, combined with reactions towards the increased labour migration from southern Europe. Labour migration to Sweden reached a peak in 1969/70 and in 1972 the recruitment of foreign labour was terminated. In 1981 a system, similar to the labour recruitment programmes of application before arrival mentioned earlier, was introduced for residence permits in order to prevent unwanted immigration (Hammar 1999a: 173). Hammar (1999a: 173-174) has pointed out that in both the mid-1960s and 1972, the Swedish government issued decrees of great importance for the regulation of immigration labour without asking for the formal consent of the parliament. Instead, it was proclaimed by the Swedish Trade Union Confederation. This means that the political system was not directly involved and that the general public was not informed. Hammar (1999a: 178-179) has even denoted the Swedish type of corporatism as *apolitical*. Above, I have discussed this type of corporatism as administrative corporatism. It is the *apolitical* character of the system that justifies comparisons with a hegemony, and it is the voicing through individual union membership that justifies the notion of a 'hegemony from below'.

The Swedish labour market is *national* in more senses than one. It is constrained not only by (physical) state borders (with some exceptions), but also by the political infrastructure. The applicability of the Rehn-Meidner model rests upon a number of presumptions, one of which is a *nationalised* labour market. While the precise influence of the model is disputed, it is generally agreed that its influence was considerable during the years from the mid-1960s to 1972. Erixon (2001: 41-43) has pointed out that "global tendencies in the post-war period are the bases for the main 'structural' argument against the Rehn-Meidner model". The model represents, in the words of Erixon (2001: 41) "the art of social engineering". The policy instruments characteristic of the model, such as a restrictive fiscal policy, a wage equalisation policy, and an active labour market policy, are interventionist and depend on the ability to measure and control supply and demand relations and make *closure* feasible.

Of interest for the discussion here is how we may understand the structuring of the family life course. From the second half of the 1960s, women were not treated solely as mothers and wives, but were also recognised as workers. This is how Sweden developed a weak male-breadwinner state, in contrast to, for instance, France and the United Kingdom which established modified and strong male-breadwinner states respectively (Lewis 1992). The recognition of women as workers involved a number of political incentives. The liberation of women from caring responsibilities for dependents through the provision of child care facilities is, of course, a necessity for women's entering the labour market. Yet it is important to recognise that the pure creation of caring institutions does not by itself function to increase female labour market participation. In addition, the increased female labour market participation cannot be reduced to a result accomplished by the women's movement (e.g. Naumann 2005). Instead, and as I have discussed above, this must be understood from a broad perspective taking account of the national institutional setting and its contours of membership, and how these evolve over time. This approach invites us to consider the re-patterning of the family life course beyond the 'immigrant problem' and the 'feminist debate'. Thus, in this perspective the creation of caring institutions is rather a consequence of nation-building and membership figuration than an explanation of high levels of female labour market participation. However, this does not disqualify the importance of the debates on the

immigrant problem and gender inequality in the 1960s³⁴, or of the 'key roles' of certain persons, for the outcome of political processes. In any case, while these debates were not limited to Sweden, the state-building perspective applied here sheds light on why the Swedish state response to these evolved as it did. Moreover, in this way the characteristics of Swedish caring institutions are both constituted by and constitutive of the state-family relation as well as of social relations within the family. This is also how the state mediates the relation between individuals and the society.

The Swedish way of everyday life

Equality and solidarity are central hallmarks within the Swedish welfare state in general, and within the People's Home in particular. I shall consider the meaning of these ideals with regard to the *normal* biography. The *normal* biography is constituted by and constitutive of bounded welfare because it implies not only *conducting* the same child caring/parenting, but also *wanting* the same child caring/parenting. This implies that *freedom of choice* has been ruled out. Below, I am concerned with freedom of choice as it has evolved with regard to the non-male and non-Swedish. I outline the political debates on gender and ethnic relations, considering the freedom of choice of 'non-male' and 'non-Swedish' patternings of the normal biography. In this discussion a male pattern of the life course refers to labour market participation.

Starting with the debate on gender relations, 1946-61 is dominated by the *housewife contract* which emphasises different roles of the sexes: women do unwaged work at home, and men do waged work at a workplace. 1961-76 is characterised by the *equal rights contract* and a consensus about women's *right* to waged work and equal salaries. The period is marked by debates on gender roles and the women's double burden. Large segments of the trade unions argued that the already existing agreements regulating the labour market were sufficient for the levelling of equal rights and that no additional legislation was needed. The agreements were formulated in neutral terms and, since this implied equal treatment, anti-discrimination legislation was argued to be redundant. However, in a protracted process, labour market discrimination against women became more and more obvious and the debate changed. 1976-86 is dominated by the *equal opportunity contract*. This period is characterised by the extension of

³⁴ Which for instance included the 1968 movement!

women's equal rights to women's *equal opportunity*. By this time, the *freedom of choice* had already disappeared (as discussed above). Among the policy instruments for equal opportunity we see propaganda and the fostering of gender roles among children from an early age. Media and schools were used in order to implement the new gender contract (Hirdman 1998: Chapter 5) and teachers were taught to teach the new roles to the children (Hirdman 1998: 225). Finally, the period from 1986 onwards is characterised by increasing conflicts.

Turning our attention to the debate on ethnic relations, in 1945-64 assimilation was considered to be an automatic social process. In the *policy-making period*, 1964-75, the debate on policy aims shifted between mutual adaptation and freedom of choice (Hammar 1999a: 172; cf. Dahlström 2003: 43). In 1968 the investigative committee on immigrants (*invandrarutredningen*) delivered the first governmental proposition discussing a cohesive integration policy. The committee was of the opinion that the 'adaptation-freedom of choice paradox' required the state to clarify its position. At the time this could not be done. However, equal rights and the principle of a universal welfare state (in opposition to special demands and selective solutions) were formulated as political goals (Dahlström 2003: 44). This is of course very much in line with the women's equal rights contract. In practice it meant a policy of permanent residence permits. Until the stop in 1972, trade unions gave consent to recruitment of foreign labour provided that the migrants were offered living and working conditions equal to the rest of the population (and that they were associated as trade union members). This development stands in contrast to the guest-worker programmes implemented in other European countries (Hammar 1999a: 175-176).

When the investigative committee on immigrants delivered its final report in 1974 the debate on immigrants had changed. The committee supported equal rights, freedom of choice, and partnership as political goals, and these were accepted in the parliament in 1975 (Dahlström 2003: 45). Hammar denotes this 'towards multicultural Sweden'. The goal of *equal rights* meant that immigrants should have living conditions equal to the rest of the population in Sweden. *Freedom of choice* meant that migrants should be able to choose to what extent they wanted to keep their culture/idiom of origin and adapt to Swedish culture and language, and *partnership* meant that minority-majority relations should prosper. By the mid-1980s freedom of choice was not totally abolished, but it had

definitely diminished. The three goals lasted until 1997 when a new integration policy was introduced. This emphasises *equal rights* and *opportunities* for all irrespective of ethnic and cultural background (Dahlström 2003: 46).

According to Hirdman, the non-male patterning of the life course, i.e. with no participation in the labour market as a feasible option, was abolished at a certain point of time, and according to Dahlström the 'non-Swedish' patterning of the life course was diminished in the 1980s but never definitely abandoned. In her analysis of gender relations, Hirdman identifies a change in focus from the individual women to the societal structure. While the debate in the 1950s was characterised by a focus on the woman as problematic, in the 1960s this changed to a focus on structural obstacles. This is how policy instruments such as family taxation and the construction of day care centres came into question (Hirdman 1998: 162-163; cf. Waldemarsson 2000: 112-113). Dahlström does not see this shift with regard to immigrants. Thus, whereas the freedom of choice was never entirely abandoned, the individual migrant remained the changing object. Dahlström (2003: 53-54) argues that labour market policies, adult education and Swedish language teaching are the most important policy instruments in the field of immigrant politics, and these are all targeted toward the individual – the (problematic) immigrant. Swedish integration politics have only to a limited extent been targeted towards structural hindrances to migrant inclusion in Swedish society. This suggests that the 'Swedish working class hegemony' plays out differently towards the non-male and non-Swedish. The subordination of non-Swedish appears to be harsher than the subordination of non-male; the 'normal biography' is more Swedish than it is male. These understandings may be related to the family as a set of social relations and to rights to roots.

Towards the end of the 1960s, social policies extended beyond social insurances in order to include social relations. Policies were extended to include active (re)structuring of social roles associated with un/waged re/productive work outside and inside the family. It is important to recognise that these structurings occurred along with *normative* reconceptualisations of welfare. In comparative studies, Kremer (2002, 2005) has shown that social policies do not only serve to produce certain sets of welfare services: in fact they also foster different caring ideals. Hence, what is considered 'good' welfare is context-bound. With regard to

child caring, this suggests that whereas 'full-time mother care' is 'good' in one context, in another it may be 'parental sharing' or 'intergenerational care' that is deemed good (Kremer 2002: 129-130). Obviously, these different caring ideals harmonise with different sets of social relations inside the family. Whereas this understanding has informed the analysis pursued above, the applied data do not allow a discussion of what implications the accomplished change of the family as an institution has had on the family as a set of social relations. Instead we are limited to considering the ideal of equality, yet not assuming that this is fully accomplished.

Swedish citizenship contains extensive rights to options, whereas rights to roots are barely recognised. This means that it is assimilationist, distributing equal rights as well as all-inclusive (sometimes by force, as when trade union membership conditions the recruitment of foreign workers). Whereas an assimilationist self-understanding is typically connected with a civic nationhood, Swedish nationhood may not be discerned as characteristically civic. Instead, an ethno-cultural notion of nationhood has coincided with, and been taken for granted within, the civic. This is how Swedish social policies in a territorial perspective may be understood to have evolved at the northern fringe of Europe.

Part III

Transnational strategies and national structuring at crossroads

People do not necessarily live their lives in consent with welfare state borders and boundaries. This fact stands in contrast to national social policies being constituted by and constitutive of an expected relative immobility. I shall examine this tension and argue that it should be taken into account in political debates as well as in academic research. Drawing on the two previous parts I set out to answer the two questions posed in the introduction: *How do transnational and national welfare diverge?* and *How is social policy constituted by and constitutive of the nation-state?* I intersect the concepts and methodologies of the transnational turn in migration research with those of the territorial turn in social policy research, and consider welfare at the intersection of a lived mobility and an expected relative immobility. The empirically grounded analyses of transnational welfare strategies and Swedish welfare structuring serve to shed light on *the welfare mobility dilemma* as it plays out at the everyday and policy levels respectively.

Below I start out with a theoretical discussion on unexpected and expected biographies and connect these with the livelihoods and life course approaches applied in the two previous parts. I consider various aspects of integration, and tensions between overlapping memberships in more polities than one and exclusive membership in a single polity. In the empirical part I consider the welfare mobility dilemma at the everyday level as a tension between divergent frames of welfare. The welfare mobility dilemma at the policy level is considered in its institutional context and in how the Swedish state respond to mobility and immobility. As the final step in this part I enter a tentative discussion on transnational welfare. I reflect upon the 'the transnational social question' and propose two research directions of further research on welfare encompassing both mobility and immobility.

Un/expected biographies in integrationist perspective

There is a tension between the unexpected and the expected biography. Here this tension is regarded as a struggle between the transnational and national frames, between a lived mobility and an expected relative immobility. Studying migration from a welfare state perspective, Michael Bommers (2000) has conceptualised unexpected biographies as *interrupted* biographies. Taking another approach considering transnational dynamics of migration, Valérie Amiraux (2000) has discussed transnational strategies not only as *unexpected* biographies in a welfare state context, but also as *avenues for transnational integration* in an everyday context spanning state borders. Below I elaborate the unexpected and expected biographies as proposed by Amiraux, linking them to the livelihoods approach and the institutional structuring of the life course. This implies a methodological intersection of (relative) mobility and (expected relative) immobility with further implications for the understanding of welfare at the everyday and policy levels. In the following discussion I consider conceptual implications of viewing these divergent notions of integration and societal membership as overlapping and exclusive.

Unexpected and expected biographies of welfare

Transnational social spaces may provide a framework of reference and action for individual and collective actors alternative or supplementary to that of the nation-state. This suggests that we may conceptualise transnational welfare strategies as alternative or supplementary to those of the normal biography (à la Leisering 2003). Amiraux (2000: 227) has proposed that "transnational dynamics that arise as a consequence of migration equip people with social options that present additional or alternative 'biographical' prospects in terms of the relationship between the individual and national welfare states". Hence, whereas welfare states in general, and life course politics in particular, structure the expected biography, transnational dynamics may provide an alternative space that allows individual and collective actors to escape an ascribed (expected) biography. And whereas the expected biography refers to standardised patterns of the life course, the unexpected biography refers to the *de*-standardisation of these. According to Amiraux, transnational social spaces

may be understood to present a space alternative to the national and an option for *integration without assimilation*.

By way of cross-national comparison, Amiraux (2000) illustrates how national institutional frameworks and variances in the national membership spaces influence the transnational dynamics in each country. Amiraux's approach invites us to consider variances in welfare state responses to transnational social spaces and how they influence the provision of unexpected biographical options. Transnational social spaces also depend on the type of ties and the degree of institutionalisation (Faist 2000*a*). Not only do transnational social spaces evolve differently depending on a number of institutional variables, but individual and collective transnational actors also invest differently in the alternatives offered. Hence, what we see are distinct trade-off effects.

In my analyses of the transnational and national frames of welfare I apply different methodologies. I apply a livelihoods approach in order to elaborate transnational welfare strategies, and an (institutionalised) life course approach in order to elaborate the 'normal' biography; the 'Swedish' biography. In the discussions below, the unexpected biography refers to transnational welfare strategies, and the expected to the normal biography. Analyses of livelihoods and institutionalised life courses rely on incongruent methodologies, and obviously the conceptualisation of the unexpected and the expected biographies does so too. The approach to unexpected biographies stresses the everyday level and the significance of continuity over the biography, while the approach to expected biographies stresses the significance of the surrounding environment such as the influence of social policies. This distinction between the unexpected and expected biographies has several implications for our understanding of *integration*. The comparison of the transnational and national frames of welfare involves a comparison of the unexpected and expected biographies, hence it is central for this comparison to clarify the relation between these two approaches.

Amiraux (2000: 241) makes a rather loose distinction between unexpected biographies understood from a "time-sequential perspective" and expected biographies understood "according to participation in specific domains". In the subsequent section I shall advance this distinction by drawing on the applied approaches of livelihood and the institutionalised life course, looking at what the implications for our understanding of integration are. I comprehend the tension between the

transnational and national frames of welfare as a tension between integrations through the unexpected and expected biographies. It is a tension between integration into an alternative space and integration into the national frame, or between integration without nation-state assimilation and integration as nation-state assimilation. Yet despite tension between the two, they do not necessarily stand in opposition to each other.

Integration in perspective

In this book I treat various aspects of integration that can be divided into at least three aspects: social integration, integration of individuals into society, and integration across individual and collective life courses. *Social integration* refers to the relationships that bind individuals together into social units. With regard to transnational social spaces, social integration refers to the bridging mechanisms of social and symbolic ties anchored in two or more nation-states. With regard to the welfare state context, social integration refers to the lock-in mechanisms of bounding for bonding. In the Swedish case this refers to the operational logic of Swedish administrative corporatism as discussed earlier. Whereas the mechanisms of transnational social spaces are connected with overlapping memberships across borders, the mechanisms of the national membership space are connected with the consolidation of national citizenship.

The *integration of individuals* into society refers to the inclusion and exclusion of individuals in the membership space. Above I have considered the peculiarities of Swedish state response with regard to social class, gender and ethnicity, notably the in/exclusion of women and immigrants into the ruling working-class space. Obviously, this has implications for the access to national citizenship.

The *integration across the life course* refers to two different understandings of integration: one that conceptualises the life course as an explanatory variable in itself, and another that conceptualises it as a phenomenon to be described and explained by a variable which is detached from the life course itself (Dannefer 2003). The life course as an *explanatory variable* refers to earlier life course experiences as a means to explain subsequent life course outcomes. This perspective has informed the transnational livelihoods approach and the discussions on transnational avenues for welfare. In these discussions I consider how experiences in earlier phases of life can influence the choice of welfare

strategies later in life. This is what Amiraux refers to as unexpected biographies. The life course as a *phenomenon to be explained* has informed the discussion on the institutional structuring of the life course. In this perspective, integration refers to the ways in which different life phases are interconnected by way of life course politics. This perspective has informed the analysis of the Swedish biography. The explanatory variable of integration is positioned in the surrounding structure such as that of social policies, instead of in the life course itself. This is what Leisering (2003) refers to as the integration mode, which I have mentioned in the discussion on the institutional structuring of the life course. It is also what Amiraux (2000) conceptualises as an expected biography. Thus, when I see to the integration of welfare across everyday life within the transnational and national frames, this means different things depending on the conceptualisation of the everyday level of analysis – biography as a livelihood or as a life course. Here the integration of welfare across the unexpected biography regards the biography as an explanatory variable, while the integration of welfare across the expected biography regards national social policy as the explanatory variable.

In their construction, life course policies assume a relation between the state and the individual that extends over the entire course of life. The integration across the life course is typically based on an assumption of ‘complete’ tripartite division of life course: childhood–adulthood–old age, or, with more relevance to social policies: education–employment–pension. International migration obviates this cradle-to-grave relationship, and Bommers (2000) has from a life course politics perspective rightly discussed migration in terms of *interrupted biographies*. This is because neither education and employment credentials nor pensions are automatically transferred from one country to another. Bommers emphasises the importance of a normal biography in terms of a ‘full-length’ biography within the national realm of the welfare state for the integration of individuals into societal membership. In this perspective, life course ‘repairing’ facilitates the inclusion of immigrants.

Whereas Bommers is concerned with the integration of individuals into the society through social policies repairing interrupted biographies, Leisering is concerned with social policies integrating different stages of the life course. However, neither of them problematises the actual existence of a normal biography based on a life-long relation between the individual and the nation-state as a means of social inclusion and

exclusion (in a globalising world). While national social policies can repair to integrate the life course in a *national* perspective, this leaves the *transnational integration* unresolved³⁵. In a wide perspective, this can be understood in relation to how the social question was formulated in national contexts, in interaction with the state structure and specific social knowledge as discussed in the introduction. This is where the approach applied by Amiraux (2000) becomes interesting. If we consider unexpected biographies as options for integration across borders, we are not far from considering the social question in a transnational perspective as I do below.

The different conceptualisations of the expected and unexpected biographies with regard to the life course have implications for the understanding of membership. Whereas the expected biography conceptualises societal membership as an exclusive national membership, the unexpected biography may conceptualise societal memberships as overlapping. The transnational turn within migration research has advanced the understanding of integration in a direction that challenges conceptualisations of membership as exclusive. Next I discuss overlapping memberships as a de-standardisation of exclusive membership.

Overlapping membership as de-standardisation

Overlapping membership refers to simultaneous affiliations with two or more nation-states, and comprises a de-standardisation of national citizenship. National citizenship is typically conceptualised within models of 'closed societies' and as an exclusive membership in a single state. Migrant political transnationalism disputes these presuppositions (Bauböck 2003: 701). Obviously, the conceptualisation of national citizenship is rooted in the Westphalian mode of thinking. By contrast, overlapping memberships operate with institutional thinking and in particular with the transnational perspective. Bauböck (2003: 704) has argued that political theory is challenged "to go beyond a narrow state-centred approach by considering political communities and systems of rights that emerge at levels of governance above or below those of

³⁵ There are European Union and bilateral agreements for the integration of the life course regarding social insurances, but in this discussion social welfare is not limited to economic aspects. The unresolved matter of transnational welfare holds in particular true when it comes to the normative modelling of the life course.

independent states or that cut across international borders". In order to advance the discussion in this direction he elaborates a scheme of four basic state-polity relations: (i) international, (ii) multinational, (iii) supranational and (iv) transnational relations. *International relations* refer to external relations between independent states, *multinational relations* to several polities within an independent state, *supranational relations* to several independent states within a larger polity, and *transnational relations* to overlapping polities between independent states. Mobility across territorial borders is primarily an international phenomenon that becomes transnational only when it creates overlapping memberships reflecting simultaneous belonging of migrants to two or more polities (Bauböck 2003: 704-705).

The understanding of ties across two or more nation-states involves an understanding of transformations of the institutional context in both the context of origin and the host context. This is accentuated in the above discussion on transnational social spaces (à la Faist), as well as in the discussion on the unexpected biography above (à la Amiraux). Empirically grounded cross-national comparisons have indicated, for instance, how national institutional variations affect the conversion of transnational resources at the everyday level (Amiraux 2000) and the (non)recognition of overlapping ties at the policy level (Faist 2007a). This understanding is strongly opposed to what Bauböck (2003: 705-706) has denoted as the assimilationist and the segregationist perspectives. Positioning these two perspectives at the opposite ends of a continuum, the extreme assimilationist perspective regards migration as an international phenomenon and migrants as uprooted. This implies that processes of settlement and integration among immigrants are understood to be exclusively determined by the receiving country, and that the naturalisation of the immigrant is understood to resolve a temporary discrepancy between formal citizenship and territorial jurisdiction. At the other end of the continuum, the extreme segregationist perspective assumes that migrants remain tied to their country of origin. Consequently, the host country does not extend citizenship rights to resident migrants (as in e.g. the Arab Gulf states). Hence, the transnational perspective constitutes a third option of understanding migration processes, entailing a focus on overlapping and changing relations of membership.

Changing relations of membership as a normative concept may be discussed in two distinct ways: as a political concept and as a legal construct (Faist 2007a). The *political concept* refers to membership relations (or the membership space à la Rokkan), and the *legal construct* to national citizenship laws (or the territorial space à la Rokkan). This implies that the political concept of overlapping membership can be publicly recognised in the legal construct of dual citizenship, while this is not necessarily mirrored in the membership relations.

The unexpected biography can be understood as a de-standardisation of the expected biography. And overlapping memberships can be understood as a de-standardisation of membership loyalties to a single state. Whereas overlapping memberships may cause tensions within and across nation-states, this is not understood to result in a severe weakening or de-institutionalisation of the nation-state. For instance, Amiraux (2000: 246) has argued that "inclusion within alternative channels of socialisation should not be perceived as a reaction, challenge or threat, but as an alternative...for 'integration without assimilation'". This argument is underscored by Kivisto and Faist (2007: 103) who argue that dual citizenship does not challenge the nation-state.

It is important to distinguish between de-institutionalisation and de-standardisation. De-institutionalisation refers to deconstruction, and is for instance addressed in the 'welfare state retrenchment' and 'end of nation-state' debates. De-standardisation refers to increased variation, and is addressed widely in analyses of, for instance, changing working careers and family constellations. Hence, when the institutionalised life course goes through processes of de-standardisation it is becoming more varied, and does not necessarily imply that the life course in itself is being deconstructed as an institution (Leisering 2003). In the empirical part below, I consider the integration of transnational welfare as a de-standardisation of the integration of national welfare. This generates an understanding of divergent welfares. Next I consider how the Swedish state responds to overlapping ties, involving both a political concept and a legal construct.

With focus on state relations, Bauböck (2003: 721) has shown that although migrants achieve residence-based rights in the host country and retain their right to be readmitted to their country of origin, this does not give the sending state any claim to the territory of the receiving state. This, Bauböck argues, "is what separates transnational migration from

colonialism and irredentist nationalism". And with focus on state-citizen relations, Kivisto and Faist (2007: 103) have pointed out that, whereas public recognition of overlapping memberships through the acceptance of dual citizenship does not question the nation-state *per se*, it "calls into question any one state's right to claim monopoly on the membership of its citizenry". These understandings provide helpful guidelines in the discussion on the transnational social question at the very end of this part.

The welfare mobility dilemma

Increased diversity and de-standardisation of the life course are a general phenomenon in welfare states. Below I am concerned with how spatial mobility and processes of transnationalisation play out in such processes of de-standardisation. The discussion first addresses the question of how transnational and national welfare diverge. The focal point is on the family and I frame the welfare mobility dilemma at the everyday level as a tension between three divergent conceptualisations of the family. These three conceptualisations of the family indicate how social unlikeness can influence integration within and across welfare state borders. Next, I address the question of how social policy is constituted by and constitutive of the nation-state. In the discussion I consider how the Swedish institutional setting responds to mobility across borders and boundaries. The welfare mobility dilemma at the policy level is framed as a universalist dominance over particularism, and as an assimilationist approach to multiculturalism. I seek to understand how state responses to mobility across borders and boundaries function as mechanisms of inclusion and exclusion.

Instead of repeating the discussions in the previous parts of the book, below I draw on these to confront the two research questions posed in the introduction. But before doing so I shall make some further comments on how the transnational and national frames are empirically related to one another.

Two frames at crossroads: Some remarks on the cited literature

In the previous parts I have elaborated two frames of welfare: a transnational and a national. These two frames are at crossroads in more meanings than one. They not only draw on different concepts and

methodologies; most notably, their empirical data derive from separate contexts. Above I have intersected the concepts and methodologies and, in answering the two questions posed in the introduction, I employ this intersected understanding of mobility and immobility to shed light on the welfare mobility dilemma. However, the empirical understandings generated by each of the two analyses are limited to informing one another.

As already mentioned, the analytical work with the first question led me to the second. The first analysis generated understandings about welfare strategies across borders and boundaries. This encouraged me to consider how national social policies influence and are influenced by transnational strategies. For reasons discussed in the introduction I have chosen the Swedish case in this analysis. While there is research that indicates the prevalence of transnational social spaces in the Swedish context, it provides us with limited understandings of transnational welfare in the Swedish context. Ideally, strategies anchored in the Swedish context would have been included in the treatment of transnational welfare strategies. It is due to this deficit that I have been compelled to apply two discrete sets of empirical data in my analysis of the national and transnational frames. However, in the discussions below I do not limit myself to empirical examples presented in earlier discussions. Additional research is introduced in order to elaborate the discussion and to further underscore the prevalence of the transnational strategies in the Swedish context.

In the discussion of whether the borders and boundaries of welfare within the transnational and national frames diverge, I draw on empirical examples from the part about transnational welfare strategies. Drawing on secondary data spanning large terrains, the empirical frameworks leave a broad margin of imprecision, and the analyses undertaken here should be viewed as a tentative inquiry into the welfare mobility dilemma, primarily in order to indicate the relevance of the area and to suggest appropriate concepts and methodologies guiding further research. In the following discussion about how social policy is constituted by and constitutive of the nation-state, I draw on empirical understandings based on the Swedish case. Hence this discussion is limited to the Swedish case, and it is important to note that it does not claim to be valid beyond this.

Welfare at the intersection of transnational strategies and national structuring: A case of divergent welfares

Social welfare is intimately intertwined with the family. This holds true for both the transnational and national frames. I intend to delineate some divergences between the *operational logic* of the family in relation to borders and boundaries of welfare within the transnational and national frames. Divergent operational logic of the family refers to social unlikeness with respect to family welfare safeguarding, and the discussion revolves around different sets and kinds of social relations within the family.

Transnational welfare strategies are constituted by and constitutive of unexpected biographies across borders and boundaries of welfare, while national social policies are constituted by and constitutive of expected biographies. Whereas Daly (2000) has argued that social policy is interlinked with the family as an institution that carries out certain functions and as a set of social relations, I shall extend this argument in two respects. First, social policy is not an exclusive agent structuring the family as an institution and as a set of social relations. If we go beyond the welfare state regime context, there are alternative institutions doing this structuring. I have dwelt upon this in the introduction (with reference to Bevan 2004). Hence, I extend the application of Daly's model beyond the realm of national social policies. Second, when mobility is considered, and in particular when mobility stretches beyond the welfare state regime, we are obliged to consider a third aspect of the family, namely the family as a specific group of kin. This means that whereas I draw on Daly and discuss the family (i) as an institution that carries out certain functions and (ii) as a set of social relations, I add the family (iii) as a specific group of kin. It is important to stress that these distinctions are analytical notions rather than empirical observations; empirically the manifestations of social welfare in relation to these notions of the family are intertwined.

The conceptualisation of the family as *an institution that carries out certain functions* varies not only between the welfare state regime and the informal security regime, but also within both these regimes (see e.g. Lewis 1992; Bevan 2004). By contrast, the family as a *specific group of kin* appears to vary between the two regime types, but less within them. This is reflected in the variation of the family as *a set of social relations* taking intergenerational and gender relations into account. The patterns of intergenerational and gender relations appear to be consistent with regard to their significance within each of the frames. Within the transnational

frame *generational* relations appear to be very significant, whereas in the national frame these appear to be relatively *insignificant*. By contrast, looking at *gender* relations these appear to be relatively *insignificant* within both the transnational and the national frames.

Looking at gender relations, these vary within the national frame due to cross-national differences in national social policies (e.g. Lewis 1992; Daly 2000), and within the transnational frame due to negotiations related to time, place and context of the migratory process. Gender relations negotiable within the transnational frame are illustrated for instance by Pessar (1984), Toro-Morn (1995) and Hirsch (2000). The study presented by Pessar (1984) shows how changed patterns of female labour market participation and income impede changes of social relations and asymmetric power resources within the household. Toro-Morn's study shows that even though poor Puerto Ricans resisted negotiations about the function of the family, they were willing to accept these in times of economic constraint. And while Orellana (2001) illustrates generational relations as non-negotiable, Plaza (2000) pictures the return of the 'old' set of relations in the second round of migration (see discussions in Part I). The comparative perspective employed by Hirsch (2000: 384) not only highlights the way in which the cultural changes in the Mexican community in the United States are a result of both transnational linkages and of social processes within Mexico, but suggests that these changes may be linked with globally available ideologies. While the women in the U.S. and Mexican fields both shared the same norms, the women in the United States appeared to have more leverage in negotiating towards that ideal. This implies that the men are more willing to adopt a new paradigm while away from the watchful eyes of fathers in Mexico, or perhaps that they attach to a globally available ideology in a specifically Mexican way, Hirsch argues.

Turning to intergenerational relations, their interpretation as (very) significant within the transnational frame and as (relatively) insignificant within the national frame relies on data from multi-sited fieldwork among individual and collective transnational actors (see Garrison and Weiss 1979; Plaza 2000; Anderson 2001; Orellana et al. 2001). Hence, the interpretation of the divergent patterns of intergenerational relations and the tension between these is drawn from 'transnational experiences' of the national frame. The studies by Garrison and Weiss (1979) and Orellana and colleagues (2001) consider how American family values exert pressure

on transnational families residing in the United States. Instead of a tension between conjugal and consanguinal ties, Plaza (2000) illustrates how family responsibilities change over time and how intergenerational ties become increasingly important in times of migration. The study by Anderson (2001) indicates a connection between intergenerational and gender relations. Since gender relations are substantially unequal and unreliable, intergenerational relations appear to prove important in welfare safeguarding.

The empirical examples are limited to describing the organisation of transnational welfare accounting for gender and intergenerational relations, and hence I shall refrain from comments on why these sets of relations have emerged. Independently of the explanatory variable(s), strong intergenerational relations appear to be very important for welfare safeguarding within the transnational frame of welfare. I shall therefore further consider the tension between consanguinal and conjugal conceptualisations of the family within the transnational and national contexts.

Assumptions about the family as a specific group of kin are reflected, for instance, in immigration policies. Immigration policies can be formulated with the intention to unite families, and yet function to divide them. As an example, Garrison and Weiss (1979) point out that despite the immigration policies in the United States intended to 'unite' families, the regulations functioned to separate closely knit families since they assumed another notion of family than what was practised among the Dominican and other Caribbean groups. The immigration regulations did not stop immigration, but caused delays and exerted pressure on the families. This illustrates not only how immigration policies are both constituted by and constitutive of a certain notion of the family, but also how this is resisted by certain actors.

Different conceptualisations of the family as a specific group of kin have also been attended to in Swedish research. Johnsdotter (2007; cf. Melander 2007) has highlighted how divergent conceptualisations of the parent-child relationship exert pressure on families. Whereas according to Swedish laws this is a *genetic* relationship, in other family systems it is a *social* relationship that extends beyond a narrow genetic dimension. This causes confusion in regard to immigration and social authorities. If the parent-child relation is discovered by the authorities to be non-genetic, the parent or child will not be treated as family. Instead, a child who is

sent to reside in Sweden with her/his (new) parents may be categorised as a 'lone refugee child', and a child residing in Sweden who is sent off to her/his (new) parents in another country may be categorised as 'dumped'.

Garrison and Weiss (1979) argue that a more realistic immigration policy should acknowledge that it is *families* rather than individuals who migrate, and that what comprises a family varies. This statement is underscored by Tienda's (1980: 394-395) study, where more than 97 percent of the interviewees had familial or friendship ties (with an emphasis on familial ties) in the United States prior to immigration. Despite the fact that better opportunities for improving life are a central consideration in the migration process, it does not discount the importance of family factors, Tienda argues. Evidently, family dynamics, whether or not recognised by the immigration country, influence the 'migration inflow' to the country of immigration. This underscores the relevance of relational analyses in order to grasp both migration and familial dynamics. It is also why I am inclined to argue that welfare research in transnational perspective must be sensitive to different notions of the family as a specific set of kin and to the consequences thereof.

The transnational process appears to impede negotiations of both gender and intergenerational relations, and the discussion pursued above may be interpreted to indicate that while negotiations of gender relations do not necessarily jeopardise transnational *family* welfare safeguarding, negotiations of generational relations may do so and in consequence these negotiations are hampered. This understanding of relational dynamics across the transnational and national frames of welfare has far-reaching consequences for a critical assessment of the incorporation of individual and collective transnational actors into the host context by way of a welfare state expected biography. First, national social policies are inappropriate for individual and collective actors living their everyday lives in and through transnational social spaces, in that they do not safeguard family welfare across the entire life in the transnational context. Whereas safeguarding through national social policies does not span borders (in a North-South perspective), safeguarding through informal security does. Second, there appears to be a tension between the operational logics of welfare within the transnational and the national frames. Looking at the Swedish case, national social policy is not only constituted by the conjugal breadwinner family type prevalent in Social Democratic welfare regime, but also constitutive of this. Hence, whereas welfare in the transnational

frame is safeguarded by intergenerational relations, in the Swedish frame welfare is extensively safeguarded through individual relations outside the family, such as with the state and the labour market. The unexpected biography appears to consist of kinds and sets of social relations that are put under pressure and that exert pressure on the expected biography. This tension comprises the welfare mobility dilemma at the everyday level. Next I seek to discuss some challenges that divergent welfares pose in the Swedish case.

Challenges to the Swedish national frame

The analysis of the nation-state and social policy illuminates how Swedish social policies can be understood from the perspective of state formation and nation-building. Social policies revolve around the national labour market and serve to shape the expected biography to function in the Swedish context. The analysis of transnational social spaces and welfare strategies illuminates how transnational welfare strategies are shaped to function in more than one context. The strategies may be said to centre on the family as a welfare safeguard, and may be conceptualised as unexpected biographies. Sometimes alternative biographical options are accessed by way of religious institutions. The above discussion argues that the conceptualisations of the family as an institution, a set of social relations, and as a specific set of kin vary between the expected and unexpected biography. Moreover, the above discussion of divergent welfares suggests that we take mobility and variances in familial dependency seriously. I shall consider how some aspects of these welfare divergences may be understood in relation to the national frame. In this discussion I relate to the second question and focus on the Swedish national frame.

I have argued that welfare states may well be understood as constituted by and constitutive of the nation-state, rather than as emerging out of it as has been proposed elsewhere. I have then illustrated, in an empirically grounded analysis, how this is manifest in the Swedish context. Sweden is very much a welfare *state* regime (à la Gough) generating high degrees of de-commodification (à la Esping-Andersen) and de-familialisation (à la McLaughlin and Glendinning). The Swedish type of welfare state is an extension of a unitary and uni-national state (à la Moreno and McEwen) composed of centralised institutions with a compelling structuring capacity. This institutional framework has generated two contrasting developments of relevance for everyday lives lived in and through

transnational social spaces. The first I discuss as the universalist dominance over particularism, and the second as the assimilationist approach to multiculturalism.

Multicultural policies may be created and implemented to recognise the increased (ethno-cultural) diversity that everyday lives lived in and through transnational social spaces lead to. Banting and Kymlicka (2004: 242) have proposed 'multicultural policies' to denote "policies that go beyond the protection of traditional individual rights of citizenship to provide some additional form of public recognition or support or accommodation of ethnic groups". The Swedish welfare state has not been constitutive of multicultural policies of this kind. Whereas other things have been heard in the debate and even written down in policy documents, at the implementation level multicultural policies prove to be residual even when studied over time (Dahlström 2003, 2004). Instead of public recognition of cultural diversity, we see inclusive subordination into the Swedish realm. This development may be understood as a path-dependent process that plays out in relation to the state structure, political institutions and the formulation of the social question. This is what I have argued in the introduction and shown in the part on the nation-state and social policy. The operational logic of Swedish institutions has generated, and is generated by, a path to the very universal welfare state that the Swedish welfare state constitutes. This same path has undermined particularistic policies such as multicultural policies. This is how the *universalist domination over particularism* is to be understood. In a Rokkanian terminology, this would be understood as rights-to-options dominance over rights-to-roots (discussed in Part II under 'National lock-in: Bonding and bounding').

It is important to note that my argument is that there is a tension between the *operational logic* of Swedish institutions and particularism, while there is no such tension between this operational logic and universalism. This does not necessarily translate into a tension between particularism and universalism, or between multicultural and social policies as is argued elsewhere. Instead, the tension between the operational logic of the institutional framework and certain politics is distinct from the often debated tensions between different types of politics as well as between diversity and social cohesion (I comment further on this debate in the discussion on transnational welfare below). The institutional setting frames both social policies and multicultural policies, and in the

Swedish case this has led to the well-known Social Democratic model and the People's Home, and rather weak forms of public recognition of social unlikeness with regard to welfare safeguarding as well as ethnic diversity. This indicates that the question is not to what extent Swedish politicians should or should not create and implement multicultural policies, or whether these policies erode the welfare state or not, but that, in fact, the Swedish institutional setting appears to be incongruent with particularistic policies. This suggests that looking at multicultural policies as a means of recognition in the Swedish context is looking in the wrong direction. Instead we must turn to the second issue in this discussion, namely the assimilationist approach to multiculturalism.

Acknowledging common individual rights of citizenship is indeed one form of accommodating transnational actors within the national frame. However, this should not be confused with multicultural policies, at least not if we define multicultural policies as policies that go beyond the protection of these common rights to provide some additional form of public recognition (Banting and Kymlicka 2004). Considering the public recognition of dual citizenship, it is not self-evident whether this represents common individual rights or goes beyond the protection of these common rights and provides some additional form of public recognition. Yet in my view, public recognition of dual citizenship goes beyond the protection of common rights.

In Sweden, dual citizenship is recognised by law since 2001. Whereas quite a few countries implicitly accept dual citizenship, there are not so many that recognise it publicly. These divergent developments may be understood with regard to the institutional framework of each nation-state (Faist 2007a). Several factors may be identified as having influenced the Swedish public recognition of dual citizenship. Focusing on the debate that preceded the decision, Spång (2007) has proposed that the understanding of the coherent treatment of *denizens*³⁶ living in Sweden and Swedish nationals living abroad alleviated the acceptance of the pluralist interpretation of place attachment that underpins the acceptance of dual citizenship. Focusing instead on the institutional framework, Spång points out the low levels of differentiation between denizens and citizens and the high levels of *de facto* toleration of dual citizenship, and

³⁶ *Denizen* refers to aliens, typically with a permanent residence and working permit, acquiring citizenship-like rights (Hammar 1990).

proposes that the public acceptance of dual citizenship may be understood as a path-dependent process. The recognition of dual citizenship is then understood as a next logical step along with a number of extensions of rights for denizens, reflecting the hallmarks of equality and solidarity.

At a first glance, this may also underscore the universalist domination over particularism; but if we consider what Spång mentions as the pluralist interpretation of place attachment, the issue turns different. This refers to an understanding of overlapping memberships: that persons may have attachments to two or more places. While there were both pragmatic arguments bringing up the pre-existent *de facto* acceptance and ideologically charged arguments emphasising the necessity of recognising overlapping ties, the ideologically charged arguments were more important than the pragmatic. In any case, dual citizenship may be understood as "an example of how nation-state regulations implicitly respond to ties of citizens across states" (Faist 2007a: 3). In this way the de-standardisation of membership in a single polity was being publicly recognised, and it may be interpreted as an *assimilationist approach to multiculturalism* in that it assimilates multiculturalism (or multinationalism) without recognising the peculiarities of it. That is, dual citizenship is recognised as a legal construct but not as a political concept.

The Swedish institutional framework is as capable of universal politics as it is incapable of particular politics. Yet its assimilationist self-understanding, guided by the hallmarks of equality and solidarity, leads to a public recognition of dual citizenship. This is how we may understand the welfare mobility dilemma at the policy level in the Swedish context. These features have far-reaching consequences for transnational actors maintaining an everyday life in Sweden. We are therefore obliged to consider what the options for welfare across the Swedish borders and boundaries are, and how these may be improved if needed. Indeed, this appeal is valid not only in the Swedish context but across any borders and boundaries, and it is directed as much to academic researchers as to public policy-makers. Welfare across borders and boundaries is an important topic and, as a final step of this inquiry, I shall discuss transnational welfare and two possible directions of further research into the topic.

Transnational welfare: A tentative discussion

The growing discrepancy between the organisation of states and citizens and how people organise their everyday lives requires a re-thinking of the social question. This re-thinking is bound to acknowledge that states are not closed entities and that welfare is multi-situational. This is also precisely why it is fruitful to bring the transnational turn into research on social policy and social work. Transnational social spaces may provide biographical options alternative to those presented by national social policies. This opens up for understandings of integration beyond the limits of nation-states and for the thinking of welfare across the borders and boundaries of national social policies. In this way, the transnational perspective nurtures the formulation of the *transnational social question*. The *transnational social question* introduces a new way to approach migration and the welfare state nexus, and may be viewed as an attempt to advance this beyond the deficiencies of methodological nationalism. I shall propose two research directions to advance the understanding of the transnational social question: one focusing on the emergence and development of transnational social spaces, and the other focusing on state responses to such phenomena. The proposals concern integration across borders and overlapping memberships. Hence they stand in conflict with research conceptualising integration as incorporation into a single state and membership as exclusive – the *uninational social question*. Yet the *transnational social question* is not to be understood as a de-institutionalisation of the *uninational*, but rather as a de-standardisation of it. Below, I first discuss the transnational social question as de-standardisation of the *uninational*, and then I outline two possible research directions beyond the ‘old’ set of questions.

The *transnational social question*

The *transnational social question* refers to the consideration of welfare across national borders and boundaries. Considering the social question in transnational perspective is diametrically opposed to how it was formulated at the turn of the last century. In the introduction I discuss how the formulation of the social question restructured the social sciences, and how this in turn shaped the state response to the social question, the social role of the state. Relying on perspectives developed by Wittrock and

Wagner (1996), I consider how state structures, knowledge discourses and the formulation of the social question set the agenda for both national social policies and the national knowledge production on the matter. If we accept this understanding of the (*uninational*) social question at the turn of the twentieth century, we may want to consider the *transnational* social question in the light of emerging theoretical perspectives and methodological approaches as well as emerging patterns of international migration.

This is not to say that the tentative formulation of the transnational social question has occurred thanks to these developments, but that the possibility of thinking in these directions has occurred in an interrelated process in which one development influences the other – in which changing historical forms, changing forms of knowledge, and changing methodologies are interrelated. The multi-sited and state-centred approaches are approaches that take us beyond methodological nationalism, enabling critical assessments of various entities of inquiry, including the state. This development may be viewed as mandatory due to the fact that individual and collective actors increasingly organise their lives transnationally. Indeed, it is an argument of this book that academic research and public debates on national social policy and social work are obliged to consider mechanisms of inclusion and exclusion in transnational perspective.

Research conducted from a transnational perspective emphasises the importance of *trans-localities* (e.g. Glick Schiller 2007). As a matter of fact, my analysis in Part I does not point to the state as an important instance of transnational welfare strategies. This suggests that while the state may be an important instance, we should not limit our consideration of the social question to this societal structure, but take account of social structures that actually prove to be of relevance for welfare among individual and collective transnational actors. In a discussion of the developmental heterogeneity across the globe (including variations of citizenship and state structures), Faist (2007*b*: 28) has pointed out considerations of the social question in relation to states as inaccurate. Rather, he argues, we should consider the transnational social question with regard to "socio-spatial spaces that are not necessarily state-regulated". Such trans-local socio-spatial spaces may involve religious and other formal or informal institutions organised across the borders and boundaries of national social policies. This understanding informs the

research directions proposed below. The transnational social question may be considered across borders and across boundaries. The transnational social question across *borders* accounts for spatial mobility and has on the one hand to do with migrant *immigration* and with access to welfare services, and on the other hand with social roles that (not necessarily state-regulated) organisations take on across nation-state borders. The transnational social question across *boundaries* accounts for social unlikeness, often thought of as ‘cultural’ or ‘ethnic’ diversity.

It is not possible to consider the transnational social question within the realm of thinking represented by methodological nationalism. However, as I have stressed, the *transnational* social question is not to be understood as a de-institutionalisation of the *uninational* social question, but rather as a de-standardisation of it. I shall now attempt to propose research on welfare and im/mobility grounded in the transnational social question.

Understanding divergent patterns of emergence and organisation of transnational welfare

Transnational welfare refers to the integration of welfare across the life course among individual and collective transnational actors. It is related to the transnational social question and involves a concern of welfare that goes beyond ‘statist’ assumptions about the organisation of welfare in everyday life. Indeed, the presented typology of transnational welfare strategies does not indicate that states or state-regulated organisations are an important instance of the maintenance of transnational welfare. However, instead of relying too much on typology I would urge further research on transnational welfare. I suggest empirically grounded analyses of divergent patterns of *emergence* and *organisation* of transnational welfare. The analyses in this dissertation are limited to considering the organisation of transnational welfare. While studies of the organisation of welfare may shed light on such phenomena as tensions between welfare that is organised transnationally and nationally, they are incapable of explaining it. Studies of the emergence of transnational welfare involve multi-sited approaches to the institutionalisation of welfare.

It is an argument of this book that analyses of transnational welfare must account for the family as an institution and as a set of social relations. However, the family as an institution cannot be reduced to a family-state relation, nor can the relations inside the family be limited to

considering gender. The transnational family as an institution should be considered in its trans-local social environment, which may involve formal or informal organisations across or within the borders and boundaries of national social policies. Hence the family-state relation is reduced to a dependent variable. The transnational family as a set of social relations should account for both gender and generational relations. In this way, the reduction of transnational welfare to a 'social rights thing' is avoided, and research is enabled to consider transnational welfare as something that influences the everyday lives of women and men differently within and across welfare state borders.

The emergence and organisation of transnational welfare is understood to depend on both the context of origin and the host context. Transnational social spaces may entail different welfare dynamics depending on which trans-local contexts are involved. That is, within each nation-state several transnational welfare dynamics may be identified due to the specific trans-localities involved. Hence it is my belief that research on transnational welfare within and outside the family gains from taking a substantial lead in pursuing empirically grounded analysis relying on multi-sited fieldwork, in order to advance some empirically grounded understandings of transnational welfare dynamics.

Understanding divergent patterns of state response to transnational welfare

Just as welfare states have claimed rights for their citizenry, welfare state researchers have typically studied the *incorporation* of migrants into the national realm of the welfare state. However, as individual and collective transnational actors "claim and are claimed by two or more nation-states, into which they are incorporated as social actors" (Glick Schiller 1999: 96), studies of incorporation in the sense of exclusive incorporation into a single country have little relevance in describing how individual and collective actors have incorporated themselves transnationally across nation-state borders. As pointed out above, the acceptance of dual citizenship brings this matter to an extreme (Kivisto and Faist 2007).

The emergence and organisation of transnational welfare depend (in part) on nation-state response to the creation of transnational spaces for alternative biographical options. The nation-state may function to promote or inhibit the integration of transnational welfare across individual and collective life courses. The state-building perspective offers

a potential in understanding state responses. Relying on state-centred methodology, it opens up for analyses of social integration and how mechanisms of inclusion may have an excluding effect on certain individual and collective actors. Hence, instead of the integration of certain groups into the host societies, the perspective taken here suggests that research should focus on patterns of state *response* to these. Whereas the analyses pursued in this dissertation are limited to considering state response within a single country, it is my belief that understandings of patterns of state response gain from cross-national comparisons.

The two approaches proposed here take us beyond the 'old' focus on incorporation in a nation-state perspective, and they may serve for re-thinking national social policy and social work as mechanisms of inclusion and exclusion in transnational perspective.

Conclusion

This dissertation considers welfare with regard to both mobility and immobility. Approaching welfare with a dual focus on mobility and immobility has several implications for our comprehension of welfare within and beyond welfare state borders and boundaries. The analyses are guided by conceptual, methodological, and empirical insights from the transnational turn within migration research and the territorial turn within social policy research. Through conceptual and methodological developments, the analyses accomplish an empirically grounded understanding of the welfare mobility dilemma as it plays out at the everyday and the policy levels. This conclusion is devoted to a discussion of how the different conceptual and methodological insights have contributed to the dual analytical focus taking both mobility and immobility into account in the empirical study of welfare.

In a general sense, a dual analytical focus on mobility and immobility enables welfare analyses to consider the tension between processes of globalisation and the Westphalian type of state system. The dissertation has examined this tension with regard to *transnational* migration and the national welfare state as manifested at the everyday and the policy levels. Below I discuss the conceptual, methodological and empirical insights in the mentioned sequential order. The insights are organised in a table with respect to analytical focus on mobility or immobility and to the level of analysis. The theoretical concepts have relevance for the analytical focus on mobility or immobility, and the methodological approach has relevance for the level of analysis. Whereas the conceptual and methodological insights are general in character, it is important to recognise that the empirical conclusions are not claimed to be valid beyond the contexts in which they are grounded. As the final step of the conclusion, I consider implications of these insights for further research on welfare in globalising contexts.

Table 3. Types of insights from the transnational and the territorial turns for the development of a dual research focus on welfare taking both mobility and immobility into account

| ANALYTICAL FOCUS TYPE OF INSIGHT | MOBILITY | IMMOBILITY |
|---|---|---|
| CONCEPTUAL | OVERLAPPING MEMBERSHIPS INTEGRATION WITHOUT ASSIMILATION | EXCLUSIVE MEMBERSHIP INTEGRATION AS ASSIMILATION |
| METHODOLOGICAL | STATE-CENTRED APPROACHES FOR ANALYSES OF STATE RESPONSE ----- MULTI-SITED APPROACHES FOR ANALYSES OF TRANS/NATIONAL WELFARE | |
| EMPIRICAL AT THE POLICY LEVEL ----- EMPIRICAL AT THE EVERYDAY LEVEL | ASSIMILATIONIST APPROACH TO MULTICULTURALISM ----- UNEXPECTED OPERATIONAL LOGICS OF FAMILIES | UNIVERSALIST DOMINANCE OVER PARTICULARISM ----- EXPECTED OPERATIONAL LOGICS OF FAMILIES |

Conceptual insights: Perspectives on welfare within and beyond welfare state borders and boundaries

In a globalising world where the organisation of land and people into states and citizens has a decreasing correspondence with how people organise their lives, social scientists are obliged to consider the integration of welfare not only in a statist perspective but also beyond this. The intersection of the transnational and territorial perspectives enables analyses of welfare with a dual focus on mobility and immobility. On the one hand, integration may be considered as incorporation or even assimilation into the national realm of the welfare state, and on the other

hand it may be considered as integration without assimilation considering alternative biographical options spanning the borders and boundaries of nation-states. Integration as (full) incorporation into the national realm of the welfare state is related to understandings of exclusive memberships and mechanisms of national bounding for bonding. Integration without assimilation is related to understandings of overlapping memberships and mechanisms of transnational social and symbolic ties. Here overlapping membership is understood as a de-standardisation of exclusive membership, and hence transnational social and symbolic ties as a de-standardisation of national bounding for bonding. In combination, these perspectives open up for an understanding of the integration of welfare both within and beyond welfare state borders and boundaries.

It is important to recognise that an analysis of un/expected biographies with a dual focus on im/mobility compels the scholar to go beyond normative, often taken-for-granted conceptualisations of welfare. If analyses of un/expected biographies rely on implicitly normative concepts, the analysis will go wrong by (de)valuing certain conditions/strategies in relation to others. That is, relying on implicitly normative conceptualisations, the analysis becomes incapable of understanding welfare integration beyond these norms, including options for integration across the expected welfare borders and boundaries, unexpected biographical options and integration without assimilation.

Methodological insights: Multi-sited and state-centred approaches to welfare

Inquiries into welfare beyond the borders and boundaries of welfare states must apply methodologies that take the analyses beyond statist notions of integration and membership. This is why it is fruitful to apply multi-sited and state-centred approaches in such analyses of welfare. Multi-sited approaches enable analyses of the multi-situational character of welfare. This involves analyses of trans-local formal or informal organisations of welfare within and beyond welfare states' borders and boundaries. Hence, this approach is not reduced to integration as assimilation, but is sensitive to transnational integration of welfare. While this approach turns welfare as a normative concept into a dependent variable beyond statist assumptions, the state-centred approach opens up for a re-thinking of the meaning of social policy, i.e. for inquiries into social policy as a dependent variable.

Of relevance here is that state-centred approaches may accomplish analyses of state responses to unexpected biographical options involved in the transnational integration of welfare. In the analysis of the nation-state and social policy, I seek an understanding of Swedish state response to processes of transnationalisation in a very *longue durée* perspective. It may be argued that this very long historical perspective is exaggerated. Yet I have found it appropriate, not only for the empirical answer it has generated (which could admittedly be done in a shorter historical perspective), but also to illustrate the explanatory weight of the historical institutional approach to Swedish welfare state development. Despite severe criticism³⁷, the power resource perspective still underpins the dominant understanding of the Swedish welfare state development. This becomes particularly crude in cross-national comparisons of social policy development beyond the welfare *state* regime. Thus, the very *longue durée* is not merely chosen to accomplish an empirically grounded analysis, but also to illustrate that Swedish workers' and farmers' power resources are not the mere product of a red-green coalition in Parliament in 1933, but very much dependent on the institutional setting which is best understood in a long historical perspective. In this way the analysis in Part II is made both to achieve an empirical result and to express a statement in the debate on appropriate perspectives and approaches in welfare state research.

Empirical insights: The welfare mobility dilemma

The welfare mobility dilemma refers to tensions between the transnational and national frames of welfare – welfare crossing borders and boundaries vis-à-vis bordered and bounded welfare – as it unfolds in the everyday lives of individual and collective transnational actors and at the policy level in the Swedish context. The analyses set out to answer two research

³⁷ Skocpol and Amenta (1986) have pointed out that the power resource perspective appears to be applicable only in analyses of the Swedish development. Rothstein (1992a, 1992b) has shown that the formative moment of the Swedish Social Democratic era actually appeared under a right-wing government, and hence argued that the explanatory variable cannot be reduced to the appearance of the red-green coalition in Parliament in 1933. In a cross-national comparison of Sweden and Germany, Naumann (2005) has shown that the development of child care institutions cannot be reduced to feminist power resources but must be understood by taking into account the institutional setting.

questions: How do transnational and national welfare diverge? and How is social policy constituted by and constitutive of the nation-state?

The answer to the first question draws primarily on empirical insights from the transnational turn within migration research, but is informed by the understanding generated from the territorial turn within social policy research. In the theoretical framework, welfare is related to the family as an institution and as a set of social relations, and the analysis relates the divergence between transnational and national welfare to divergent operational logics of the family. Divergent operational logics of the family refer to social unlikeness with respect to family welfare safeguarding. The discussion revolves around three divergent notions of the family: the family as an institution that carries out certain functions, the family as a set of social relations within the family, and the family as a specific set of kin. These are considered as abstract and interrelated notions of the family. Under particular focus are gender and intergenerational relations, and the relations show a consistent pattern with regard to their significance within the transnational and national frames. Within the transnational frame *intergenerational* relations appear to be very significant, whereas in the national frame these appear to be relatively *insignificant*. By contrast, looking at *gender* relations these appear to be *insignificant* across both the transnational and the national frames.

The answer to the second question draws primarily on empirical insights from the territorial turn within social policy research, and the cited literature has allowed reinterpretations from this perspective. Understandings of transnational welfare dynamics have informed the discussion. The discussion revolves around the Swedish case and the particularities of the Swedish institutional setting in a *longue durée* perspective. The inclinations to universalism and assimilation are traced in the processes of nation-building and state formation, and social policy is regarded as constituted by and constitutive of the nation-state through its universalist dominance over particularism and the assimilationist approach to multiculturalism. I argue that there is a tension between the operational logic of Swedish institutions and particularism, while there is no such tension between this operational logic and universalism. At the same time, I point out that this does not necessarily translate into a tension between multicultural and social policies as is argued elsewhere. Instead, the tension between the operational logic of the institutional framework and certain politics is regarded as distinct from these other, often-debated

tensions between multicultural and social policies as well as between diversity and social cohesion. As the institutional setting frames both social policies and multicultural policies, in the Swedish case this has led to the well-known Social Democratic model and rather weak forms of public recognition of social unlikeness, with regard to welfare safeguarding as well as ethnic diversity.

The *transnational* social question: Welfare analysis beyond 'methodological nationalism'

The analyses in this dissertation have not only shed light on the welfare mobility dilemma, but also promoted deliberations of the transnational social question. As an advantage, the transnational social question takes research at the migration and welfare state nexus beyond the deficiencies of methodological nationalism. Whereas the accomplishment of the extensive Swedish *welfare* state definitely is worth celebrating, we should not ignore its *Swedishness* as excluding unexpected biographical options. Whereas much research considers how migrants can be included within the national realm of welfare states, the *transnational* social question suggests that we leave such 'old' questions behind and look in other directions for migrant integration. Transnational social spaces may function to provide unexpected biographical options. The analyses in this book suggest that individual and collective transnational actors maintain their welfare across welfare state borders and boundaries. The presented typology of transnational welfare strategies indicates that individual and transnational actors in fact do *not* necessarily rely upon state-regulated strategies. It is against these understandings that I have proposed further research on migration and the welfare state to consider divergent patterns of emergence and organisation of transnational welfare, and divergent patterns of state response to transnational welfare.

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