

# **The Welfare State, the Middle Class, and the Welfare Society**

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**Abstract** The welfare state system commanded a social consensus for a certain period after the Second World War and is still regarded by some as an ideal model. Since the 1970s, however, it has been exposed to criticism due to fiscal crises, problems in everyday life, etc. As a consequence, the welfare state is surrendering its exalted position to a welfare society where people are at the center of management through local communities and nonprofit organizations (NPOs). In Japan, the welfare state and the welfare society are regarded as being antithetical in terms of the people who run them. The welfare state is considered to attach great importance to assisting the poverty-level/low-income group. However, because social insurance constitutes the core of its policies and the middle class has gradually come to enjoy substantial benefits through expanded coverage by welfare services and reductions in the burden of beneficiaries, this system is giving rise to the idea of “the welfare state for the middle class.” On the other hand, NPOs, which are considered to be a key component of welfare society, are simultaneously organizations whose framework is supported by the middle class. The middle class, therefore, is becoming both the beneficiary of the welfare state and the backbone of welfare society. The aim of this paper is to reconsider the positions of the welfare state and the welfare society in the light of this new perspective of the middle class.

## **1. Introduction**

With the arrival of the twenty-first century, it may be said that the welfare state stands at a crossroads. There was a time when the twentieth century was called “an era of socialism.” This was true not only in the establishment of socialist states at the beginning of the century but also in their decline toward its close. In fact, the welfare state and its vicissitudes may well have been a product of the twentieth century.

The welfare state, which had been in preparation together with the various elements needed to support it since the nineteenth century, was formed in earnest after the Second World War; at one time it was the ideal model of developed capitalist countries that aimed at a mixed economy in their rivalry

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with socialist countries. Starting in the second half of the 1970s, however, when various countries experienced low economic growth, the welfare state received widespread criticism (the crisis of the welfare state) and the concept of the ideal model underwent a change. One revision was provided by the change hypothesis “from the welfare state to the welfare society.” But irrespective of the actual situation, the idea of “the welfare state and the welfare society” itself—almost 25 years after the publication of R. A. Robson’s (1976) work under the same title—has become somewhat outmoded. Taking its place is the concept propounding the harmonious transition from a welfare state centered on central and local governments to a welfare society centered on local communities and nonprofit organizations.

Yet we need to remember that the welfare state was created to reverse the adverse effects of the “anti-welfare society,” which was unable to provide its people with the minimum living standards, security, or stability. The reality then was fraught with unemployment and health problems, as well as the increasing burdens of child care, nursing care, etc., caused by changes in the social structure and the weakening of families and local communities. The recognition that the existing political system could not resolve these dilemmas and that public dissatisfaction would lead to the destabilization of government paved the way for the welfare state. It follows that one could not be so optimistic as to imagine that a welfare society would be formed in accordance with “pre-established harmony” even if it is clear that the welfare state had come to a dead end. Rather than treating the concept of “the welfare state and the welfare society” as merely the transition of hegemony from one model to the other, would it not also be necessary to reformulate a kind of analytic relationship between these two ideals?

This study adds another dimension to the welfare state/welfare society debate. That dimension is the middle class. There are untold issues regarding the middle class alone, but here I will refer to workers as the new middle strata with a middle-class consciousness, the greatest common divisor.<sup>1</sup> Is it not possible to transform the notion of “the welfare state and the welfare society” into a theory of civilization that looks back over the twentieth century through the confirmation of this concept of the middle class and the actual state? This paper

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<sup>1</sup> Major issues with respect to the concept of the middle class include the following: (a) Is it a stratification or a social class? (b) Is it defined by occupation or income? How does one evaluate the problem of status inconsistency? and (c) Is it substance or consciousness? Although these issues are well understood, I will treat the middle class here (to the extent necessary to develop my argument) only as consisting of workers who constitute the new middle group with a middle-class consciousness as a minimum. Though it is somewhat dated, see Ishikawa et al. (1982) concerning these points.

aims to establish such a perspective.

Because it involves a number of difficulties, empirical examination to clarify the trilateral relationship of welfare state/welfare society/middle class is by no means easy; accordingly, the focus here is on fundamental issues. Nevertheless, in considering the twenty-first century in a hypothetical manner, I will establish a new viewpoint, one that asks the question, "For whom is the welfare state intended?"

## **2. Development of the Welfare State**

### **2.1. From Convergence to Diffusion**

In the welfare state system, which has undergone full-scale development since the mid-twentieth century, the central government has generally constituted the core; its role has been to achieve a welfare state, and the scope of its domain has been the state. But in modern society, which has produced internationalization and globalization, expansion is no longer limited to one state but has come to affect the achievement of such a task in a variety of ways.

An order to ensure the minimum level of security and stability for a society through various institutions and policies mainly at the state level, but also at the local level, is called a welfare state system. This system, together with the various elements needed to support it, had been in preparation since the nineteenth century but was established in earnest after the Second World War. Broadly speaking, the welfare state has five basic components: (1) a social security system; (2) central and local governments as the managerial core of the system; (3) social recognition and legislation of fundamental human rights, which support the system's establishment at the ideological level; (4) the justification of state intervention in the economic sphere to achieve full employment; and (5) the realization of mass democracy based on the principle of parliamentary decision making in the political sphere. A system suitable for governing the welfare state is formed by combining these elements, though in different degrees. With economic/political/ideological conditions in place after the Second World War, transition to the welfare state system became a comparatively simple task in developed countries and was demanded by the people.

It was H. Wilensky's (1975) "theory of convergence in the welfare state" that established a theoretical hypothesis that was sociologically important to the welfare state. According to this theory, the policy structures of countries with different social conditions, lifestyles, and cultures would all become welfare state-oriented through industrial progress and the rise of manufacturing. Wilensky tried to explain the progress of a country's social security as an increase in

national income, an increase in the proportion of elderly people, and a mature of the social security system; to some degree, he succeeded. His proposition furnished a good description of the status of social security in various countries between the 1950s and the 1970s. It also demonstrated that improved social policies corresponded to the steady economic growth enjoyed by these countries in the latter period.

In the 1970s, however, the situation underwent a change and Wilensky's convergence theory came under fire. One criticism related to "the crisis of the welfare state" in the second half of the decade. In 1981 the Organization for Economic Cooperation and Development (OECD) warned that the welfare state, which had developed during a high-growth period of the world economy, would face a crisis under a fiscal burden that would increase in relative terms during a low-growth period. In reality, the predicted immediate decline in the social security budget did not occur. Nevertheless, the fact that the welfare state requires appropriate conditions within a country's economic structure was clarified. When the conditions became inappropriate, developed countries started to transform their welfare state systems in diverse ways—from the mid-1970s through the 1980s—through their respective political structures and labor-management relations mechanisms. The neoconservative response in the United Kingdom and the United States and the neocorporative response in Sweden are good examples (Mishra 1990). Such changes were referred to as "the end of convergence" in the sense that the scenario of countries developing similar welfare states collapsed (Goldthorpe 1984).

## **2.2. Limits to a Welfare State System in One Country**

In the 1990s, management of the welfare state became even more difficult as a result of increasing borderlessness and intensified competition for capital, human resources, and information, referred to as "mega-competition," as well as financial crises in various parts of the world (Tada 1997). Part of the reason for this was that developing countries, having strengthened their manufacturing capacity, were catching up with developed countries, providing the world with products at lower prices and in some areas even achieving an economically competitive position. Because both industry and the state in developed countries incur high costs, such as for production and social security, developed countries are becoming unable to compete with the lower-priced products, as well as with the economic structure that produces them. Clearly, a country does not exist by itself in a laboratory but is only one of many countries of the world's economy involved in complex relationships with other nations.

The structure of developed countries cannot adequately cope with a chronic

financial crisis or with downslides in industry and finance; when an entire economic structure shows signs of weakening, depending on the industry, bankruptcy is no longer a rare phenomenon. As a consequence, maintenance of full employment—a pillar of the welfare state—is becoming more difficult to achieve. This not only causes increased unemployment but also places a burden on social insurance. When the performance and thus the profits of business enterprises do not improve and the wages of workers do not increase, the income from social insurance premiums does not grow either. Moreover, because unemployed people cannot afford their insurance premiums, it is necessary to pay them unemployment insurance and, depending on the circumstances, provide them with public assistance; this increases government expenditures for social security.

At the same time, businesses must keep their costs low to compete with cheap products arriving from developing countries; this means that the burden of half the social insurance premiums and corporate welfare, which have so far been carried by the business sector, have reached their limit. Even if the state attempts to increase social insurance premiums to maintain the social security system, business enterprises are no longer able to respond to such measures. Under these circumstances, practitioners are beginning to argue for a “lean government,” from which the superfluous flesh has been culled but which is firm and whose framework is well defined, rather than the alternative of “big government or small government,” which is politically debated in regard to the appropriateness of state intervention in the economic structure.

Initially, it was thought that the welfare state was capable of solving the problems of national life. But developments in the world economy have made it more difficult to manage the welfare state using only one country’s logic. In this sense, it is suggested that “a welfare state system in one country” has collapsed. As early as the 1950s, Swedish economist G. Myrdal (1960) asserted that the concept of “a welfare world,” rather than a welfare state, was necessary, voicing the criticism that a welfare state tended to concern itself only with the domestic situation. In the 1990s, even issues such as whether a state could maintain its own welfare system or how it could be maintained came to be affected to a significant degree by developments across the globe. Thus the idea of a welfare world has become less an absurd suggestion than an analytic viewpoint.<sup>2</sup>

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<sup>2</sup> So far I have taken up arguments related to the economic structure from among welfare state theories. In recent years, however, citizenship theories related to the legal structure and typological theories that make an international comparison with regard to the establishment and development of the welfare state have also been on the increase. For citizenship theories, see Ito (1996); for typological theories, see Okazawa and Miyamoto (1997).

### 3. From a Welfare State Theory to a Welfare Society Theory

#### 3.1. Theories on a Welfare Society in Japan

In looking back over the development of the welfare state, one sees that an incontrovertible reality has existed, although not without the element of a political slogan. In this process idealism faded as it became increasingly difficult to defend the welfare state given the “failure of government” to remedy the “failure of the market.” In contrast, Robson (1976) has overcome this difficulty by bringing the welfare state and the welfare society into the same arena and introducing the welfare society as a kind of ideal model. He explained the relationship between the two concepts as follows: “The welfare state is what Parliament has decreed and the government does. The welfare society is what people do, feel and think about matters which bear on the general welfare” (p. i). “Some of our most serious difficulties are due to the fact that we are trying to be a welfare state without a welfare society” (p. 3). “Only a democratic welfare society makes it possible to establish and maintain a true welfare state. Therefore, we must not only look at the services and functions of public bodies but also take into account the attitudes, opinions and behavior of the people themselves” (p. xxiv).

Here, it is assumed, Robson argued, that a welfare society created by people is a prerequisite for the promotion of a welfare state comprising various institutions; he emphasized the implicit relationship of the “welfare state/welfare society.” Moreover, a sense of community is a prerequisite to mobilizing people for a welfare society: “It is this which is at present lacking, and until we can acquire it, a welfare society will not exist and the welfare state will have built its elaborate structure on sand” (p. 111). In comparing Japan and the United Kingdom, Robson pointed out that three conditions existing in Japan were favorable to the advancement of a welfare society: (1) the absence of racial problems, (2) successful labor-management relations, and (3) the absence of a hierarchical system (pp. xvii–xix). His emphasis of these points acknowledged that social problems caused by a class society, labor-management clashes, and immigration from the former colonies were hindering the promotion of a welfare society in his own country. “We [Britain] cannot have a genuine welfare state without a welfare society as its counterpart; ...each is complementary to the other; and ...so far we have achieved only a limited success in building a welfare state because there are so many elements in our society and our policies which are in conflict with that aim” (pp. 215–16).

Then, how were welfare society theories treated in Japanese society which, according to Robson, has more advantages than British society? From a political viewpoint, the Japanese advocated transition to a welfare society in two stages. The first stage, from the end of the 1970s through the first half of the 1980s (Hori

1981), was endorsed mainly by the Liberal Democratic Party and the Economic Planning Agency. It aimed to achieve a welfare society by strengthening self-help mechanisms—the family, which is a latent welfare asset, mutual assistance at the local community level, corporate welfare, etc.—after having ascertained the limitations of the Western welfare state. According to this theory, governmental policy would be the ultimate complement to welfare society during this period, which gave prominence to the element of selectivity in order to minimize the intervention of the state and to limit assistance to those in real need. Here, particular emphasis was placed on the unique role of the Japanese family, which, unlike its Western counterpart, is committed to the support of aged parents and the strengthening of the family base. But even then this theory was criticized as merely a way for the government to extricate itself from the fiscal crisis by making public responsibility ambiguous and placing an excessive burden on the Japanese population. Too, the relative decline in the family's support function, on which great expectations had been placed, gradually became obvious. Nevertheless, since 1975, as local reformist governments have reconsidered the merits of welfare society, various elements of stage-one theory, such as the importance of the family, community care and home care, which had just begun, and Japanese-style labor-management relations, which reportedly had given rise to the notion of the superiority of Japanese society (Japan as Number One), came to be advocated under the rubric of a welfare society (cf. Fukutake 1984).

The second-stage advocacy of welfare society took place in the 1990s, when “the theory of participatory welfare society” was put forward by the Economic Planning Agency and the Ministry of Health and Welfare (Economic Planning Agency 1993). In this stage, volunteers and nonprofit organizations from diverse fields were considered to be the backbone of society when it was impossible to rely on families and communities alone. At the same time, however, the recipients of services, such as the elderly and the disabled, were themselves expected to participate in social programs. Supporting the theory indirectly were the women's action groups, which played a central role in providing welfare services with the participation of citizens, that had begun to appear in various parts of the country since the mid-1980s, and workers' collectives, as well as the acceleration of NPO activities with the Great Hanshin Earthquake—said to be an important turning point in the second stage. The enactment of the Law for the Promotion of Specific Nonprofit Activities in 1998 was one consequence of this work. The welfare society theory set forth here is generally in line with welfare pluralism, which asserts that diverse actors should be involved in the provision of welfare services. But in reality, the main feature of “participation” referred to in the “participatory welfare society” advocated by government organizations is the provision of labor; such involvement does not extend to participation in decision

making or in the development of plans. Compared to the first stage of welfare society advocacy, where importance was attached to the utilization of all capacities of action groups other than those belonging to the state, the second stage is a realistic argument focused on the promotion and development of actors in the limited area of providing service. Moreover, whereas the first stage in some ways rejected the welfare state, the welfare state and the welfare society are expected to complement each other in the second stage.

### **3.2. Incentives and Mobilization for a Welfare Society**

The dual-stage development of the welfare society theory in Japan can be broadly summarized as encompassing the period from the strengthening of the family base to the passage of the NPO law. Then, why is attention focused on the activities of NPOs rather than on state implementation? On a social level, welfare society theory emerged from questions about why central and local governments existed at the core of the system, i.e., the second component of the welfare state identified earlier. This means that government intervention in economic affairs, which had been blamed on “market failure,” came to be regarded as the result of “government failure,” i.e., the welfare state had come to a dead end. The government was ineffective for three reasons: (1) direct provision of services by the government, which has no competitor, tends to be inefficient and costly; (2) it tends to produce excessive demand by users and lead to an excessive cost burden unless payment of the equivalent is required; and (3) government regulations tend to limit choices (Hoshino 1988). In contrast, NPOs are concerned with social change caused by social movements that are not everyday phenomena and the concurrent achievement of objectives through the maintenance of everyday activities. NPOs meet public objectives while providing people with choices and while simultaneously competing with other organizations. Thus they engage in routine activities while filling the gaps in service provided by government and business enterprises. Accordingly, NPOs may be termed a self-help/mutual-help social movement whose mission is the creation of a new public space (Melicci 1989).<sup>3</sup> In terms of theoretical sociology, they have emerged in response to a challenge that is both

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<sup>3</sup> Needless to say, since NPOs are not almighty organizations, they will face diverse organizational problems in the future. Moreover, there will be various types of NPOs, ranging from those engaged in activities resembling those of large corporations, following the path of “Not for Profit” or “No Distribution of Profit” (not meaning that they do not engage in commercial activities), to those that offer only volunteer activities of a local mutual assistance type; they will all experience ups and downs. Naturally, a case scenario where “failure of solidarity” becomes conspicuous following “market failure” and “government failure” can be expected, but from a different viewpoint it can be said that the history of sociology itself has been a history of ascertaining the “failure of solidarity.”



old and new: to reconstruct a middle group that links the state with its people, replacing a local and kinship community (Fujimura 1999). Robson attributed Japan's proximity to a welfare society, compared to the United Kingdom, to good labor-management relations and the sense of identifying one's company as the community to which one belongs. The labor union is one type of middle group that links the state and individuals, but the changes in living standards and lifestyles that occurred in the twentieth century require the pursuit of functions that cannot be achieved through labor unions, as anticipated by Robson. Together with the change in people's attitudes toward solidarity, linkages with NPOs have come to be sought as a way out of this problem.

On the other hand, at the individual level, as an incentive for NPOs, people in modern society, unable to find fulfillment in either work or play, are finding satisfaction in domains that are neither (Fujimura 1995a). As A. Melicci observes, NPOs can be the basis for resistance to a controlled society. For people taking part in such activities, the achievement of pleasure and self-realization has become more important than the onerous task of carrying out duties or securing human rights. The welfare services provided by NPOs can give a sense of satisfaction to middle-aged women who no longer have to focus on child care.

In fact, in recent years it has been reaffirmed that the middle classes hold the key to the emergence of such NPO activities. L. M. Salamon (1993), an advocate of an NPO theory that refers to the development of NPO-type organizations as a global "associational revolution," thinks that mobilization of the many members of the middle class, which has been prompted by long-term economic growth in countries throughout the world, is the key to prosperity (p. 409). As personal income increases, accompanied by a rise in the social hierarchy, the successive fulfillment of various desires in human life becomes a certainty. But how to define happiness once happiness has been attained is an extremely difficult question. In consequence, as A. H. Maslow points out, the need for self-realization comes to be recognized as the final task after various other needs have been met. At this point the incentive for participation in volunteer and NPO activities oriented toward self-realization can be assumed to intensify (Oda 1992). Furthermore, a nationwide survey on participation in civic activities, conducted by the Economic Planning Agency in 1997, has shown that middle-income respondents represented the largest group indicating that they "participate in social activities at present" (Table 1).<sup>4</sup>

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<sup>4</sup> Analyzing the K pattern, or the relationship between participation in volunteer activities and the social hierarchy, Hiroshi Suzuki (1987) stated that the pattern was conspicuous among the group with either a high or a low sense of belonging to a class and either a high or a low income/educational level and was inconspicuous among the middle group. Although the question raised there is different from that posed in this paper, which addresses social participation by the middle class, such difference is the difference between the operational definition of the middle group and the ideological definition of the middle class. The upper class mentioned by Suzuki can be deemed to be more or less the same as the middle class referred to in this study.

Table 1 Social activities of the entire family, by gross annual income (%)

	Total	Currently participating in activities	Have participated in activities before but are not currently doing so	Have never participated in activities	No answer
Total	100.0 (842)	17.7	15.1	56.9	10.3
Less than 2 million yen	100.0 (34)	5.9	17.6	52.9	23.5
2 million yen or more but less than 3 million yen	100.0 (76)	14.5	15.8	52.6	17.1
3 million yen or more but less than 4 million yen	100.0 (97)	15.5	18.6	51.5	14.4
4 million yen or more but less than 5 million yen	100.0 (74)	12.1	10.8	66.2	10.8
5 million yen or more but less than 6 million yen	100.0 (111)	22.5	19.8	49.5	8.1
6 million yen or more but less than 8 million yen	100.0 (120)	25.8	12.5	57.5	4.2
8 million yen or more but less than 10 million yen	100.0 (116)	20.7	16.4	54.3	8.6
10 million yen or more but less than 20 million yen	100.0 (114)	19.2	15.8	57.0	7.9
20 million yen or more	100.0 (12)	25.0	16.7	58.3	—
Don't know	100.0 (68)	5.9	7.3	77.9	8.8
No answer	100.0 (20)	15.0	10.0	50.0	25.0

Source: "Civic Activities from a Citizens' Viewpoint," ed. Social Policy Bureau, Economic Planning Agency; Printing Bureau, Ministry of Finance, 1998, 72.

Notes: Actual numbers are in parentheses. Social activities include (1) Promotion of education, culture, sports; (2) Welfare services to the aged, disabled, etc.; (3) Health and medical care; (4) Preservation of the environment; (5) Prevention of crime and disasters, city planning; (6) Global exchange and cooperation; (7) Dealing with peace and human rights problems, enhancement of women's status; (8) Relief/support of disaster victims and of disaster-stricken areas; (9) Others.

There is an episode. Some organizations that provide welfare services with the participation of middle-class citizens have adopted a so-called time-saving system. Under this system, the hours consumed by service to the elderly and the disabled are registered (saved) with the NPO; instead of being paid for their work, volunteers who require care in the future can receive services for the equivalent number of hours of past services rendered (Fujimura 1995b). The proportion of participants who are interested in this benefit is not particularly high. There may be several reasons for this. For one thing, many middle-class volunteers do not expect to need this support in the future. Even though young

disabled people want to participate in volunteer activities and save hours to provide for their old age, the NPOs are not set up to fully utilize their abilities. It is also believed that there may inevitably be a hierarchical difference between service providers and service users involving citizen participation.

Moreover, feminists have criticized the gender bias with regard to NPO participants who provide welfare services. The division of labor by sex, a phenomenon ridiculed as “men work in the heart of the city, women participate in social activities in the suburbs” or “men work overtime, women work part-time and participate in social activities,” exists latently in some NPO activities. Ironically, in some cases wives’ involvement in NPO activities can adversely affect their own self-realization by against business activities and their continued participation is possible only through the monetary support of their husbands’ corporations. For instance, some female volunteers say that they “engage in NPO activities as professional housewives.” Presumably, the stability of the financial base and lifestyle of the modern middle-class family makes such gendered division of labor possible. It is due to the existence of the middle class that the formation of a welfare society is supported by activities oriented toward self-realization. Indeed, this can be seen as the formation of a “welfare society by the middle classes.”

## **4. The Welfare State and the Middle Classes**

### **4.1. Transformation of the Welfare State**

Robson (1976) raised, if inconspicuously, the question, for whom is the welfare state intended? In his view, the middle class was the principal beneficiary of the welfare state. “With the extension in the scope of social services to include the middle classes, the redistribution element tended to diminish,” he wrote. “The policy of extending the social services to cover the entire nation came from the Labour Party although it may have led in some spheres to the middle classes benefiting to a greater extent than the working classes” (pp. 18–21).

There is a deep-seated image that the welfare state is driven by assistance to low-income groups and the prevention of poverty. In developed countries, however, the core of the welfare-oriented institutions that have achieved affluence in society has tended to be social insurance, such as medical insurance and pension insurance. With social insurance and the existence of multiple systems, as presently in Japan, horizontal redistribution within a particular class tends to predominate instead of vertical redistribution between the rich and the poor. If the amount of the benefit is primarily determined according to the amount of the premiums contributed under the annuity insurance system, etc., it

is possible that—depending on the method for calculating the government contribution—substantial funding is used for the middle class, which has been able to pay higher premiums.

In Japan, this policy applies not only to social insurance but also to social services. To cite one example, the standard fee for day nurseries is based on the ability to pay. Because the payment amount varies accordingly, fair treatment referred to as “9-6-4” (ku ro yon) or “10-5-3-1” (to go san pin) cannot be expected because the method for determining income before tax, which is a prerequisite to ascertaining the ability to pay, is unclear. Even where a substantial income is derived through self-employment, etc., the level of collection of day nursery fees can be set quite low depending on the manner of tax declaration. Moreover, in some cases a payment reduction system is established under which a local government bears a part of the costly day nursery fees set by the central government, and the degree of reduction is necessarily higher for the middle class. This is because the poverty-level/low-income group cannot enjoy the benefits of reduction due to its essentially low day nursery fees (Figure 1) (Hori 1987). Thus, the social welfare system that is based on the ability-to-pay principle and is meant to play a role in income redistribution has been transformed through paternalistic intervention by local governments. Such universal expansionary tendencies in the day nursery policy may have been strengthened in part by the idea of “children as equals (equal treatment for children at least).” Also, sometimes the administration provides subsidies or offices for NPO

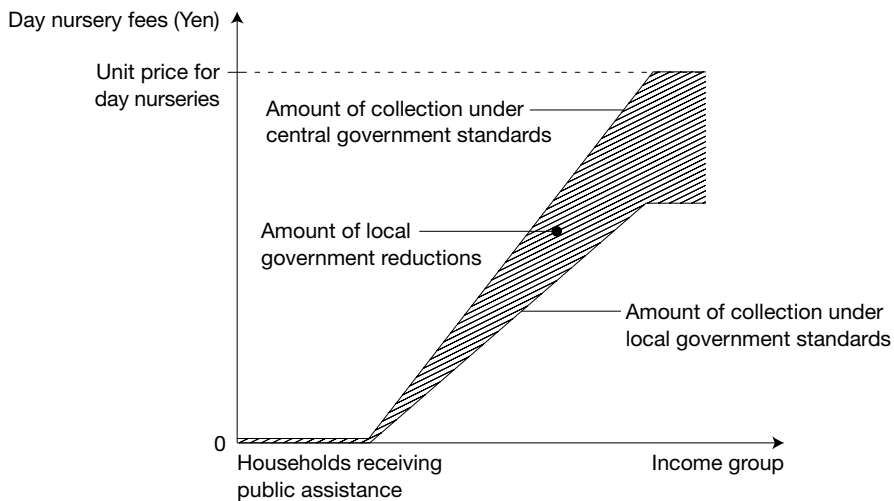


Figure 1 Model of the relationship between standard day nursery fees and income groups

activities. Since the people who use the services of the organization concerned are often from the middle class, which is capable of paying for such services itself, it may be said that this system subsidizes the middle class (Takechi 1993). In criticisms of such practices, mention is sometimes made of “the welfare state for the middle class” or “middle-class colonization of the welfare state.”

This shift to preferential treatment of the middle class over the poverty-level/low-income group has developed through the expansion of coverage under the social service system to all people in the name of universalization of the welfare state. It also demonstrates that the nature of social issues has changed: problems centering around poverty have given way to problems that affect all groups in society—the adverse effects of old age, family difficulties, and concerns of the disabled—the resolution of which is available to all citizens via social security and social services. N. Gilbert (1983), an American social policy expert, stated: “The welfare state has lost sight of its original self-limitations and has become a more ambitious, conceited and incredibly costly affair. It has become a paternalistic state promising to tackle and solve all problems, that is, promising to make human life problem free” (p. 190). In other words, the welfare state has changed course, shouldering a burden that essentially cannot be borne, under the principle of universalism. Gilbert cited the participation of women in the labor market, the instability of family relations, as reflected in the high divorce rate, and a growing and increasingly isolated elderly population as some of the reasons for the expansion of social service coverage in the United States to include the middle class. Having been picked up by the system, the middle class has come to secure a position of an existence that must be protected against a decline in life chances, just as the poor, “not as a result of a decline in their economic status but by becoming part of the ‘people-at-risk’ group” (p. 75).

#### **4.2. A Structure Friendly to the Middle Class**

The tendency of the welfare state to be more middle-class-oriented, expansion of the client base, higher standards, and the dawning of an era of low economic growth and global mega-competition—all of these factors have stretched the limits of management based only on state policy and has inevitably created the need for providers from the general economic market to enter the welfare system. This need has become more urgent given that social security reforms introduced as countermeasures to the fiscal crisis since the 1980s have had comparatively severe effects on the poverty/low-income group and relatively mild effects on the middle class. Figure 2 shows the process of such change using an ideal model. In the diamond-shaped hierarchical structure, the welfare state that started as a system oriented to the poverty-level/low-income group has

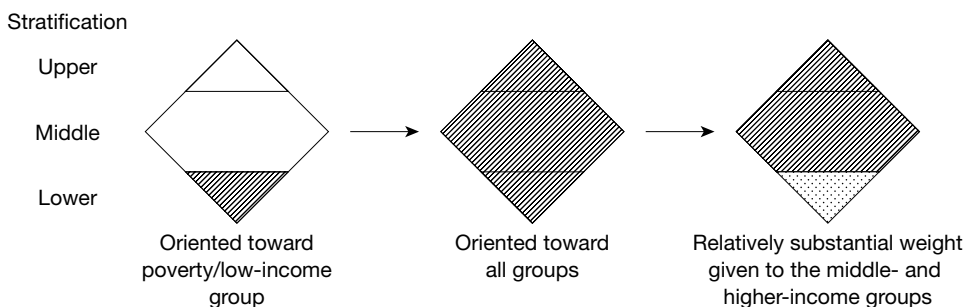


Figure 2 Ideal model of the major groups covered in the welfare state

gradually expanded its coverage to all income groups including the middle class. It may be assumed, however, that, as the stalemate within the welfare state has become obvious, the middle class has come to be more amply covered than the poverty-level/low-income group, due in part to elections and different degrees of political influence (Yamaguchi 1989).<sup>5</sup> This situation is reminiscent of something R. M. Titmuss (1963) once said: The welfare state “does not give assistance to those who are in the greatest need but gives most to those who hardly need the welfare state.”

Gilbert (1983), on the other hand, addresses the situational advantages of the middle class. Compared with low-income groups, the middle class has greater access to information on the variety of welfare services available. Moreover, because bureaucrats and social workers on the provider side are often from the middle class, the shared culture and style of communication can indirectly favor middle-class people. In addition, based on the findings of a survey of the elderly in the Tokyo metropolitan wards (1996), it has been confirmed that although basic services (medical care, welfare) appear to be equally available, in fact, there is a gap in their availability due to hierarchical factors (Table 2). With respect to the relationship between one’s perception of “living conditions” and information sources and advisers on medical care/welfare, those who considered themselves to be well off had experts on medical care or welfare within their personal network of acquaintances and relatives, those who considered their living conditions to be ordinary sought the services of public agencies, and those who considered themselves to be badly off relied on public caretakers such as district welfare commissioners. “None in particular” also accounted for a high percentage of the badly off. A similar tendency was observable in the “asset score” (Hiraoka 1998, 9). Under the present structure, then, the middle class has

<sup>5</sup> It may be that the difficulty of management of the welfare state in the second half of the 1990s is entering its fourth stage when treatment of the middle or upper class has to be less generous.

Table 2 Information sources and advisers on medical care/welfare (MA), living conditions, and asset score

Information sources and advisers	(%)												
	Family/relative	Caretaker/welfare commissioner	Doctor among acquaintances/relatives	Family doctor	Nurse, etc., among acquaintances	Person with experience among acquaintances/friends	Knowledgeable person among acquaintances/friends	Counter in hospital/ward office	Private operator	Private volunteer organization	Others	None in particular	Average number of replies chosen
Living conditions													
Badly off (68)	42.6	20.6	4.4	20.6	2.9	10.3	5.9	33.8	2.9	—	—	20.6	1.44
Ordinary (335)	69.3	13.1	12.5	34.6	5.4	9.0	9.3	37.6	4.2	2.4	0.3	5.4	1.98
Well off (127)	65.4	11.8	18.9	42.5	4.7	11.8	10.2	23.6	5.5	3.1	—	4.7	1.98
Asset score													
0–2 (109)	54.1	17.4	3.7	21.1	0.9	5.5	2.8	35.8	0.9	0.9	—	14.7	1.44
3–5 (150)	65.3	11.3	8.0	36.7	6.0	14.7	10.7	36.7	2.7	2.7	—	0.7	1.97
6–9 (143)	66.4	11.2	14.7	34.3	4.9	7.7	12.6	32.2	0.7	0.7	—	6.3	1.86
8–10 (128)	71.9	16.4	25.0	44.5	7.0	10.2	8.6	30.5	4.7	4.7	—	3.1	2.27

Source: Hiraoka (1998, 9).

Note: Actual numbers are in parentheses.

greater access to expert services.

In other words, the situation of an “affluent society,” based on the desire affirmation principle, differs substantially from the image of a welfare state where the main assistance is provided by the high-minded to the needy (Hoshino 1989). In one sense, it is natural that welfare policies should be directed to the middle class, because the middle class itself expands as a group in an “affluent society.” Accordingly, as long as the welfare state designates “the people” as the object of its policy, it will necessarily become entangled in the augmentation of policy, expansion of the scope of coverage, and a rise in the level of service delivery. Needless to say, one can argue that, based on the merit principle, as in the private insurance business, since the middle class bears a great burden, it should receive generous benefits. Thus, given a welfare policy based on the ability-to-pay principle and the objective of redistribution, a way of thinking rooted in the benefit principle tends to be adopted. If the population of the poverty-level/low-income group is larger than that of the middle class group, more money may be spent on the low-income group as a whole, even though a reverse case scenario may occur at the individual level. In fact, however, in developed countries that enjoy a high standard of living, the middle class has a larger population than the

poverty-level/low-income group and thus is the primary beneficiary of the state's welfare policy. The result is that, despite its image, the welfare state is compelled structurally to adopt policies "for the middle class rather than for the poverty-level/low-income group."

## **5. The Middle Class under the Name of "the Nationals"**

### **5.1. Equalization as an Inverse Vector**

The reason why B. Anderson (1983) once referred to the state as an "imaginary community" is that "the state as an image" provided the identity that people sought in modern society, where kinship and local communities disintegrated. The concept that has supported the image of the state, and that the state has supported in return, is that of "the nationals." The fact that the concept of the nationals developed in step with the development of the welfare state throughout the twentieth century represents, as things have turned out, expansion of the scope of coverage under a system of a guaranteed livelihood based on this concept. In this process, individual institutions extended their coverage to nationals generally through various routes such as "from soldiers to nationals," "from workers to nationals," and "from the poverty group to nationals," depending on the differences in the guarantee system and the individual states. If the categories are selected in a different way, the change would also represent the process of expansion to unconsciously include "the middle class" based on changes in the hierarchical structure in developed countries. So it may also be said that the welfare state stands at a crossroads at the beginning of the twenty-first century in part because of this expansionary policy.

Yet the idea of setting objectives based on the concept of "the nationals," put forth at the end of the twentieth century, has led to the external neglect of people other than a country's nationals (Hoshino 1994) and internal neglect of the existence of classes. Regarding the former issue, J. Kristeva (1988) characterized the national state as "a world where only those organized as nationals can enjoy rights" and raised the possibility that non-nationals and stateless people excluded from this world may be placed in a position where they have no rights at all. "Are people that are not nationals human beings? Do they have a right to enjoy human rights?" (pp. 187–88). With regard to the enjoyment of human rights, the word "equality," which originally referred to enlargement of the life opportunities of the poverty-level/low-income group as a whole, has come—since the system was established—to include the middle class. Equalization has also acted as an inverse vector. Thus, the change in the policy under which the weight of groups targeted



has been shifted to include all nationals internally, while limiting the target to nationals externally, has led to a situation described by T. H. Marshall (1963) as follows: “Citizenship which once promoted social equality has come to provide a base of equality on which inequality can be built” and “has itself become the builder of justified social inequality.” This phenomenon has been based on the idea of “universality of the question” along the lines that “everybody gets old, anybody can become disabled.”

In modern society, such thinking is supported by the perception that all nationals, including members of the middle class, cannot avoid life’s problems or accidents; underlying this perception is the fact that it has become difficult for the problems of poverty and low income to be quantitatively prominent in an affluent society. In Japan, too, the concept of “the nationals” as it exists in law, etc., and relates to social welfare has had the effect of originally targeting the poverty-level/low-income group for various services and then extending this assistance to the middle class, based on the notion of equality. Marshall emphasizes the unintended result produced in this way by the two faces of equalization in developed countries.<sup>6</sup>

## 5.2. The Welfare State as a Cultural Apparatus

What has supported such an unintended result? There are several answers to this question, and the truth is probably found in a mixture of all of them. But for the sake of argument, can’t we tentatively assume that this unintended result occurred because a kind of cultural apparatus has been in operation? The concept of a “cultural apparatus” was introduced by C. W. Mills (1963; Okumura 1997), who asserted that most of our experiences are indirect, rather than direct, experiences transmitted through something, and that the framework by which we interpret these experiences is not our own but one that has been transmitted to us by someone else. It is the transmitter of the indirect experience or the author of the framework for interpretation that Mills called a “cultural apparatus”: i.e., “the cultural apparatus is the lens of mankind through which men see” (p. 323). This concept has gradually come to be used to explain irresistible tendencies, though not a physical apparatus, that give meaning to people’s actions, experiences, or perceptions and induce, channel, or reproduce them in a certain way (Ishita 1998).

A grandiose example of such cultural apparatus was developed by M. Weber. In *Protestant Ethic and the Spirit of Capitalism*, he mentions an episode in which those who wished to be certain that they were on the side of those chosen under

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<sup>6</sup> In this regard, see Ito (1996), chapter 5.

predestination dedicated themselves to their occupation (vocation) in a spirit of diligence and thrift to prove themselves and thus contributed to the rise of modern capitalism. This incident is an illustration of the effective functioning of a cultural apparatus that defined people's actions and perception. If we apply it to the cultural apparatus within a welfare state, isn't it possible to hypothesize that the welfare state is, in fact, a function of this scenario? Of course, the focus of analysis of the welfare state is its fiscal problems and its function as an economic system from the viewpoint of personal security, but if the development of the welfare state provides a certain model for people's actions and perceptions, it will be sociologically meaningful to examine it from a cultural perspective.

The creation of the welfare state firmly instilled the idea that a new institution in society would prevent people from facing an impossible existence or an overwhelmingly difficult life. Those who benefited the most from this system were in the poverty-level/low-income group. Therefore, initially most middle-class people did not intend to rely on the "welfare state as a safety net" or anticipate that their life would descend to this level. Rather, as B. Ehrenreich (1989) pointed out, they tried to avoid becoming users of the system by seeking a more specialized, higher-level job to raise their standard of living and to increase the range of their lifestyle choices, while investing in the education of their children to maintain their social position. In some respects the welfare state, having been established as a safety net for poverty-level/low-income citizens to be avoided by the middle class, pushed the middle class—which was developing a competitive society based on the performance principle—into a socially overheated situation.

But the cultural apparatus represented by the welfare state has not been allowed to remain a mere safety net. Change is demanded by a society whose main challenges stem from aging and family-related problems. Owing to this shift in social issues, members of the middle class are also confronted with difficulties in life and need to avail themselves of the benefits of welfare policies. A change in the perception of middle-class people who are required to use the safety net that they once tried to avoid has been facilitated by the adoption of "the nationals" concept, which should be the justification for the inverse vector, and by the recognition that present problems relate to children, who should be equals, and aging, a process that everyone must face as it concerns the existence of humankind. What made this possible was the social impression that poverty had disappeared, while many people's standard of living rose and the poverty issue declined in importance.<sup>7</sup> If poverty had disappeared, the welfare state must

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<sup>7</sup> "Rediscovery of Poverty" in the United States demonstrates the fact that poverty had disappeared so completely from people's awareness that it had to be rediscovered. Ehrenreich (1989) points out the importance of the exclusion of different cultures from "the suburbs," which were formed by the middle class as poverty ostensibly disappeared (p. 53).

tackle the next set of significant problems related to livelihood—i.e., aging and family-related issues. At this juncture it became understood that dilemmas confronting the middle class were also important social concerns. This solved the problem of cognitive dissonance—that the middle class was becoming an object of the policies of the welfare state. For the middle class to use the system, the stigma had to be eliminated; what made this possible was a change in the social issues.<sup>8</sup> Yet as the middle class has become the focus of a guaranteed means of livelihood, the purpose of redistribution between income groups in the welfare state has been weakened.

In the process of creating an “affluent society,” capitalism, which was formed with Protestantism as the parent in terms of a cultural apparatus, gave birth to the middle class as an integral member on the one hand and the welfare state as a mechanism to maintain the system on the other. If it is assumed that a series of cultural apparatuses has been formed and has functioned in a connective manner, the middle class and the welfare state may be regarded as twins born of the development of capitalism in the twentieth century. Then, the qualitative changes in social issues have joined the twins together. Speaking generally about the actual relationship that emerged in this way, perhaps the “welfare state as a safety net” was only a midway phenomenon on the way to a “welfare state of the middle class.”

## 6. Conclusion

The purpose of social security, social welfare, and ultimately the formation of the welfare state has been to ensure the social rights of those who are unable to protect civil rights and liberties themselves. Concrete steps toward this goal have included efforts to realize social solidarity and social justice, as well as the function of income redistribution. A present challenge of the welfare state is to close the gap in social services provision between the poverty-level/low-income group, which was the original object of the welfare concept, and the middle class, which has in fact become an indistinct but important beneficiary. Introduction of the welfare society can be described as an attempt by the middle class to achieve its desire for self-realization. After all, it may be that “the welfare state is in danger of tying itself in knots in an attempt to do things which are self-contradictory” (Robson 1976, 203–4). Naturally, to continue to assume that “the welfare state is intended for the poverty/low-income group” without acknowledging the facts would be self-deception on the part of the middle class

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<sup>8</sup> Another important factor was that it was possible to imagine that a person “had purchased the whole service” even though, in reality, he or she bore only a part of the cost.

in light of the present reality. It cannot be said that scholars, who are mostly from the middle class, are entirely free from this conceptual trap. As A. Gouldner (1973) once lambasted sociologists who were making a latent contribution to the total control system of the welfare state while at the same time criticizing street-level bureaucrats who were in a weak position, we, as scholars, must have accurate self-perception and self-discipline.

On the other hand, what is necessary at the present stage, after recognizing the gap between the perceived and the real, is to grasp the irreversible direction of Japan's social security policies that have been expanded to include the middle class. In Japanese society, where the number of children per family is decreasing and the elderly portion of the population is rising, the areas of child/family welfare (especially child-rearing) and welfare for the aged (especially nursing care), in which the middle class are also able to get benefits, are assuming greater importance.

Clearly, we can no longer return to policies that are limited to the poverty-level/low-income group alone. Rather, it is essential to recognize that the middle class is part of the policy objective and to ensure that the policy structure will not disadvantage the poverty-level/low-income group as well as borderline groups. It will be necessary to utilize the Nursing Care Insurance Law of 1997 and to enforce the revised Child Welfare Law of 1998 in order to cope with the irreversible expansion of the scope of welfare coverage; it remains to be seen whether these legal measures will be effective. In other welfare policy areas, however, the central object is still the poverty-level/low-income group; in many such areas institutional management corresponding to the particular situation is needed, and the logic used in formulating policies for child-rearing or for nursing care cannot be applied as it is. At present, policymakers face the difficult challenge of ensuring that multiple groups, with varying incomes, are fairly served in the name of "welfare."

The argument presented in this paper only establishes a perspective on the welfare state and welfare society and may need to be revised depending on the further definition of concepts, operational preparations, empirical examination, the differences in individual policies, etc. On the other hand, some areas probably can benefit from the viewpoints expressed here—among them, abandonment of some of the hypotheses. As the problem of ethnicity has sharply exposed the fictitiousness of the nation-state, is not the bottleneck into which the theories of the welfare state and the welfare society have fallen, acutely demanding awareness of the hierarchy embedded in the concept of "the nationals," that has been used as the basis for the expansionary process, as well as of its result?

Moreover, recognition that a shift to welfare "by the middle class, for the middle class, of the middle class" is taking place is crucial if we are to come to

terms with the welfare state/welfare society at the beginning of the twenty-first century.<sup>9</sup> There is nothing new about this view of social policy theory in the West.<sup>10</sup> Rather, the social consciousness of the Japanese, who do not like to be conspicuous as a class, preferring a different but understated lifestyle, has prevented the attainment or introduction of such perception under the name of “nationals” or “universalism.” As this paper has indicated, it is possible to transform the welfare state and welfare society into a new relationship of problems, not as objects in a fight for hegemony in ideal models, by using the concept of the middle class as a medium. Recalling that at the beginning of the twentieth century E. Bernstein assumed a rise of the middle classes in modern terms, it may be said that theories of the welfare state and welfare society have been shown to pose another question in the development of this type of civilization theory: Was the twentieth century the age of the middle class?

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<sup>9</sup> Although the context is different, see Sakashita's (1997) study addressing the relationship between the middle class and morals at the time of the formation of the modern state in the United Kingdom.

<sup>10</sup> “Social stratification,” as pointed out by Espin-Andersen in a typification of welfare states, under which the welfare state, a mechanism aiming at equality, causes hierarchical differences to be reflected in policy management and a kind of stratification to be reproduced, may be understood as its corollary (Okazawa and Miyamoto 1997).

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