

EU social policy studies in China*

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Abstract

Over last twenty years, Chinese scholars have paid growing attention to the topics of European social policy and European welfare states. These researches have been motivated less by the learning of the Europe than to learn from Europe for the sake of China's reform. The intrinsic inward-looking drive on the part of Chinese researchers is attributable to distinctively different research approaches between the counterparts in China and in Europe. The paper discussed the main issues discussed by the Chinese researchers on European social policy during past twenty years while casting some lights on the most recent developments as well.

Introduction

In China, three groups of scholars engaged themselves in studying the social policies of the EU and its member states: one group takes European Community studies as profession, another group consists of country specialists, and the third group is made of social policies researchers. Roughly estimated, papers and monographs written and published in Chinese on the topics related to EU social policies may very well amount to more than a thousand. The more comprehensive ones were mainly produced in the 20 years since China adopted reform and opening-door policies in the late 1970s.

Unlike research subjects in other fields, European Social Policy Studies is multi-disciplinary, and can be approached from the perspectives of political science, economics, sociology, history, demography, studies of finance, legal studies as well as philosophy. Although Chinese scholars from different disciplines yield a wide field of vision while paying close attention to social policies, their research results show rather loosened connections.

Based on the features mentioned above, it is undoubtedly a very demanding task for Chinese scholars to summarize the situation of social

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policies in the EU and its member states. In view of this, I shall summarize the related research results in China with the aid of a cognitive framework. This framework is by no means complicated. It first answers one question: what do social policies do? Then, it shall further reply, what makes the social policies of the EU and its member states special? This is a job of putting related studies into different categories. In this way, we hope that the results can be sorted out more smoothly, while simplification can be avoided.

What is involved in the contents of the study of social policies?

As mentioned above, the research on social policies covers a broad scope; however, its borderlines are often left blurred. This arises from the fact that contemporary social policies are composed of the extensions of both political and economic elements (Polanyi 1957). In other words, the social policies are created to meet social demands and through interactions between political and economic forces. Therefore, issues in the social policy arena inevitably attract attention from economists, political scientists, as well as legislators and other researchers. Together they dissect social problems, and make social policies suitable to the economic and political conditions.

Because of the reasons mentioned above, we sometimes feel it hard to distinguish economic policies from social policies. For example, employment policy is undoubtedly closely connected with social policy, but it has long been taken as an essential part of economic policy. This is because the labor force is an indispensable element in economic studies, and the mission for social policy is to resolve social problems created by the market failure. There are long-term issues, such as the phenomena of the old-aged and the handicapped, people have no more chance of getting back into the market; there are also short-term issues, such as the unemployed and sick, who may return to the labor market. In this respect, social policy studies give rise to a subject linked with economics studies: rational social policies enhance the ability of laboring people, making them more competitive in the labor market. Irrational social policies will dampen people's initiative to produce, making them evade work, or escape from the open labor market, which is the so-called phenomenon of "moral hazard."

There is also a blurred borderline between social policy studies and studies of politics as there are close connections between political power and the society. Political powers are differently shaped and function differently in different societies. Some governments interfere with their societies directly, others indirectly, and still others intermingle direct with indirect interventions. Therefore, the domain of social policy studies should not only include social policies itself, but also the nature of a political regime and the structure of the corresponding society.

Although the domain of social policy studies is vastly stretched, there are some clues that can help us deepen our understanding. The clues mainly cover three major aspects: social demand, mechanisms and forms to meet these demands, and actors who undertake social responsibilities.

The study on social demand

Social policy research originated from the recognition of and the need to respond to social needs, and such recognition has been evolved over times following the changes of the mode of production mode and social structure. The constant changes of the modes of production, social structure and social contingencies provide inexhaustible sources to our efforts in understanding the society. Of course, the changes of social needs among different nations are by no means a simple process of heading towards homogeneity. The difference in development stages as well as in politics and cultures makes heterogeneity of social needs an inexorable reality.

Except for some brilliant expositions and clear stratifications made by sociologists, quantitative research has focused on the degree of social needs and the exposition of the rationality of such needs. Owing to the variant levels of social development and social conditions, the performance of social policies and the criterion of judging the rationality of different social policies in different societies are also different. Accompanied by discussions on common social risks and variant social needs that are brought about by the economic development, this discussion outside the economic field has continued until present.

Studying the mode and mechanism that meet social needs

The homogeneity and heterogeneity in social needs exist simultaneously, leading to two tendencies of its development: One is the phenomenon of the homogeneity of social policies in different countries, based on the homogeneity of social contingencies and social demands (such as industrial injuries and old age); the other is the different ways to deal with social contingencies proceeding from different government systems, different histories and cultures. Therefore, in the domain of social policy research, the issue of similarity and difference between the mode and mechanism arises, i.e., homogeneity leads to a common theme and even to similar forms, while heterogeneity creates different systems (Esping-Andersen 1990, etc.).

Social policy actors and their deeds

Social policies are the results of interactions among the social actors. In different societies, the difference in the composition of social actors leads to the difference among their interactions; hence, the social policies resulted from their mutual relations are different too. In recent years, considerable progress has been made in the Western academia in its research of social policy actors: a lot of research has been focused on government behaviors, political parties' roles, market functions, as well as local governments, social organizations, and even the role of individuals and volunteers. The research formed an all-round and multi-layered understanding of social policy decision-makers and those who implement them. The result of the research shows that when time passes, changes have taken place in the various relations and composite functions between the government and the market, the government and individuals, the government and the society, etc.

The particularity of the EU social policies

The European Union consists of welfare countries that have the most comprehensive social policy systems in the world. Nevertheless, it remains “a union of welfare states” rather than a “welfare union”. There are no such overall redistributive programs on the EU level as in each of the member states and the EU social policy has been built. Moreover, according to the principle of “subsidiarity” social policies have been created mainly to cope with the growing needs of the “Four Freedoms” supposedly provided by the Common Market. In a sense, the EU social policy provides us with an example of proceeding from specific social needs gradually developing appropriate social policies by reorganizing and bringing into play the initiative of all the social policy actors.

From the perspective of the social needs

It is doubtless that the European integration changes the contents of social needs in Europe. The flow of “Four Freedoms” (Commodity, Service, Capital and People) are altering traditional life styles in Europe and creating new phenomena and new problems, such as social protection issues of migrant workers, social dumping, women employment and equal-pay-for-equal-work, as well as social repulsion in industrial readjustment. The researchers are not the only ones who recognize that these problems should be resolved; policy-makers have been trying, from the very beginning, to find suitable policies and measures to keep the Europeans from victimized under the unrestricted laissez faire capitalism, while raising the competitive cutting edge of European products at the same time.

From the perspective of the institutions

Following the establishment and development of the common European market, new social needs kept emerging. To meet these social needs, mechanisms exceeding national boundaries are gradually formed on the level of the EU. This kind of mechanism includes three main components: cooperation and collaboration among national governments, mandatory regulations concerning the right of mobile labors and women, and the Social Fund with redistributive contents. These mechanisms are concerned with handling “issues related to community affairs,” or “issues concerned by the member states”; it does not affect the fundamental basis of the national welfare states with the social insurance programs as corner stones.

From the perspective of the actors

Being the most important social actors, European nation states are irreplaceable in making and implementing social policies. The social rights of citizens are fulfilled in the sovereign states. However, following the standardization process of the EU, some member states take the opportunity to regulate and

reform their domestic transfer payment and their social services. When identifying the qualifications to social redistribution, more emphasis is laid on employment, rather than habitation and the rights of citizens to benefit. Nevertheless, the EU and its institutions have gradually made their stand in the social regulations and social policy-making, further complicating the social solidarity framework traditionally made of national and local governments, individuals, enterprises, families and communities.

We shall see in the following paragraphs that the approaches by the Chinese scholars are distinctively different.

Research in China on the social policies of the EU and its member states

Oriented towards China's domestic needs

Before the mid-1980s, China's research on Europe hardly concerned with social policy. Starting from the mid-1980s, in less than 20 years' time, China's research on the social policies in Western Europe experienced a state of relatively fast development. In the ten years after the mid-1980s, Huang Su'an's *A General Survey of the Welfare States in Western Europe* (Xi'ou fuli guojia mianmianguan) and Li Cong edited: *The Social Security System in Western Europe* (Xi'ou shehui baozhang zhidu) were representative works related to the Western European social policies. They respectively introduce the social policies in the Western European countries and in the European Community. The book edited by Yu Kaixiang, Wu Yikang *et. al.* entitled *The European Community: System, Policy and Trends* also incorporates an introduction to social policy. Among those representative works, the book by Huang Su'an is good at giving an all-round summary of various phenomena in the welfare states. The book edited by Li Cong systematically introduces the social security system, the most important aspect of social policy. Finally, the book edited by Yu Kaixiang, Wu Yikang, *et. al.* gives a fairly accurate summary of the social policy of the EC.¹

From that time on, the works and papers concerning the Western European social policies have been sharing a common feature that is oriented towards China's domestic needs. The reason why people focused on the introduction to the Western European social policy is not only that Western Europe is the birthplace of the modern welfare states and has enriched experience regards to social policy, but also that China is able to make reference from the experience. In the mid-1980s, the reform of the Chinese economic system encountered a series of thorny issues, such as employment security and the welfare provided by working units. The initial establishment of the market mechanism called for a reestablishment of social mechanisms, which increased the demand to draw

¹ Huang Su'an, *A General Survey of the Welfare States in Western Europe* (Xi'ou fuli guojia mianmianguan), Beijing, Shijie Zhishi Chubanshe, 1985; Li Cong, (ed) *The Social Security System in Western Europe* (Xi'ou shehui baozhang zhidu), Beijing, Zhongguo Shehui Kexue Chubanshe, 1989; Yu Kaixiang *et al.* *The European Community: System, Policy and Trends*, Shanghai, Fudan University Press, 1989.

on foreign experiences. Therefore, social policy, that of Western Europe in particular, being once a field neglected by researchers in the past, began to draw intensive attention. After the mid-1980s, the number of published papers and works on European social policy increased, and the perspectives diversified. The research developed from generalizing the social security system of Western society to introducing to the social policy of a single country or a single policy field. This tendency of going in depth and going to the details meets the growing demand for foreign knowledge in China. This orientation towards Domestic Demand has always been a main stream in the research. According to preliminary statistics, nearly half of Chinese papers and works on European social policy are entitled or concluded by “inspirations on China.”

The concerns of Chinese scholars

The domestic demand oriented research of the European Social Policy profoundly affects its propositions and methods, which make a Chinese scholar handle the research differently from the European scholars. For example, Chinese scholars who pay less attention to the connections of the Development of Social Demand in Europe often fell short of making specific analysis of the relation between social contingencies and social policies. The scholars also deal insufficiently with the interests of the European social policy actors and their behaviors, and even insufficiently with the interactions between the European social policy and the economic policy. It is almost certain that Chinese scholars have neither done any special investigation and examination on the issue of social dumping, nor have they done any systematic research on the issue of social inclusion and social exclusion in Europe.

Chinese scholars are interested in subjects that include introductions and analyses of key countries and key policy fields. For instance, some papers focus on family issues and poverty issues;² others put emphasis on areas such as old age pension, health care insurance, employment insurance and family subsidies.³ It is certain that the topics that remain to attract the greatest interest are the European social security system and the reform of the system, since China not only needs to learn from the poverty relief measures and the issuing of old age pension etc., but to learn how to set up and reform the systems. Interest in the system drew attention from researchers to different patterns of welfare states. Right at this time, the concept of different types of welfare states raised by Gosta Esping-Andersen was noticed by some Chinese scholars. Before that, though there were a few translated documents on the differences of the social security systems in Europe and America, the documents did not arouse sufficient attention. By the 1990s, there were theoretical discussions that took place in China on Social Security and even on the entire Social Policy, particularly the

² See for example, Zhang Shipeng, “The family social welfare policy and struggle against poverty in the Western European countries,” 1995, No. 3.

³ Yang Yiyong, “The social security policy in the EC,” *Development of Chinese Human Resources* (Zhongguo Renli ziyuan Kaifa), 1995, No. 1.

discussions on issues about patterns of welfare, though they took place in fairly small circles.⁴

One of the main reasons that the efforts of categorizing Welfare did not arouse wide attention is that of the scattering and disorder of the academic market in China. The Domestic Demand Orientation may lead to an increase in the quantity of research. During the period, papers and books on European social policies and social security increased remarkably. Both issues are related to a wide range of EU issues, covering unemployment security, women employment, old age security and medical insurance, etc. Although the subjects are not in accordance with those of the European scholars, and their methods differ, the subjects contributed to enhance the knowledge of the Chinese people on the EU's Social Policy.

Another important reason why the work of categorize welfare did not arouse wide attention is that when Chinese scholars compared the Western European system with the Chinese system, they often easily discover the commonality between the two systems, but neglecting the difference between them in terms of systems, ideas, methods, etc. Take the social security system as an example: Papers discussing the commonality of the various insurance coverage and social relief plans in the EU countries far outnumber those that analyze different systems in different countries. Another reason that caused this phenomenon was that the Chinese scholars were restrained by their language ability and often focused on a single country, instead of making an in-depth system comparison among the EU member states.

In the research on Social Welfare in individual countries, Chen Xiaolu's work *The Origin and Development of the Welfare System in the UK* and Liu Yu'an's *An Analysis of the Nordic Welfare States* make detailed analyses of British social policies and the cause to the Nordic welfare states. Surprisingly, the UK and the Nordic countries represent two of the major categories of welfare systems in the world. Chen Xiaolu's work integrates the history of the British Social Policy with the idea of times typical of the UK, while Liu Yu'an combined the development of the welfare states in Northern Europe with the analyses of their social structure and social movements, which broadens the vision of the Chinese people on social policy as a main research interests. Therefore, their works are conducive to the Chinese understanding of European Social Policy. In analyzing the development of Social Welfare systems, although the results proceed more from a perspective of historical study than the study of social policy, they are much more in-depth and detailed compared to those found in the 1980s.

As regards to the study of social policy actors of the EU countries, Chinese research mainly focuses on the role played by the ruling party. In fact, the ruling parties in the majority of the EU countries had to continue, to a large extent, on implementing the social policies of their predecessors. Any major changes in the social systems would provoke pressures from various interest

⁴ "Decomposing Welfare – a discourse on welfare states studies," by Zhou Hong in *Europe (Ouzhou)*, 1997, No. 4, and "An re-understanding of 'social welfare' and 'social security' by Shang Xiaoyuan in *Social Sciences in China (Zhongguo Shehui Kexue)*, 2001, No. 3, both discussed the issue of welfare patterns, but the influences of the discussions were very limited.

groups and cannot be carried out thoroughly; therefore, usually, the current social policies are a conglomeration of ideas, propositions and interests of various factions and parties. These ideas, propositions and interests may sometimes appear in different policies, propositions, orientations, or during advocating a reduction or strengthening of specific plans. The research of Chinese scholars in this aspect is not in-depth enough. Particularly, the research on the behavior and ideas of the social actors, other than the political parties, has very much to improve.

The broadening of vision and progress in methods

It took more than a decade for Chinese scholars to introduce Western (including European, North American, and Singaporean and Hong Kong) works and concepts on social policies, but an acceptable theoretical basis of social policy research is still not established in China. One of the main reasons to this is that the researchers are not theoretically and methodologically prepared and there is a lack of association among the scholars. This is why the research of the social policy in the EU and its member states in China failed to form a mainstream viewpoint, and lingers in the introduction and explanation of phenomena.

At the turn of the new century, the chaotic situation mentioned had a prospect of change. Discussions concerning basic conception arouse. The participation of foreign scholars (mainly those from Europe) played an important role. They observed China from the perspective of traditional Western ideas on social policy, and they pointed out the gaps between China and foreign countries in research angles and conceptual applications.⁵ Some basic ideas and facts were clarified through translation, such as the role of law in the social security system, and the situation of the EC social policy, etc.⁶

During this period, a method the Chinese researchers often used was the comparison of the systems. Strictly speaking, this method does not amount to comparative study. When the systems, projects and methods of different European countries were put together and compared, new perspectives, association and new understandings would naturally be inspired. People came to see the commonality and particularity between the social policies in different European countries and they began to analyze them, and tried to find answers.⁷ This method further developed at the turn of the century. In addition to the macroscopic comparison of systems based on national states in the past,

⁵ Shang Xiaoyuan, "An re-understanding of 'social welfare' and 'social security' in *Social Sciences in China (Zhongguo Shehui Kexue)*, 2001, No. 3.

⁶ That is the so-called three possibilities: 1. Under conditions of an all-round liberalized market, it is impossible for the EU to become a sole actor; 2. The EU countries will reach a common agreement and coordinate with each other in making economic and social policies; 3. Under the premise of a unified European economy, the member states keep their respective pattern of social readjustment. See "A forecast of the trends of the EU social policies after Euro is launched in use," translated by Zhou Keming, in *Theoretical Trends Abroad (Guo Wai Lilun Dongtai)*, 1999, No. 12.

⁷ Zhou Hong, "Decomposing Welfare – a discourse on welfare states studies," in *Europe (Ouzhou)*, 1997, No. 4.

people proceeded further to compare specific policies and methods, and further to compare far reaching cultural origins.⁸

Let's again take the framework found at the beginning of this paper, namely, to proceed from the framework of social needs, social institutions and social actors and their ideas. By studying the research Chinese scholars have done on the social policies of EU and its member states in this period, we can see the following progress:

First of all, as regards to social needs, the subject that intrigues Chinese scholars the most is the unemployment issue in the EU countries. The dominant view in this field in China holds that analyses should focus both on the economic difficulty of Western Europe and the inflexibility of its labor market, both on the social safety network and the employment motivation.⁹ Meanwhile, Chinese scholars also extended their observations to specific issues, such as unemployed youths, retirement ahead of time, part-time job and informal employment, thus gaining further detailed understanding of the situation of social needs in the EU countries.

In the research on social actors and their ideas, there are three focuses: The first is the analysis of the relation between "social justice" and social legislation done by some historians from Nanjing.¹⁰ Another focus is the discussions around the social policy orientation between the current Neo-Left and Neo-Right in Europe based on the traditional research of political parties. The reflection on Thatcherism has extended to textual research of the Tory's position in the historical development of the welfare state, in order to clarify that social policy has been a merit of both the Left and the Right.¹¹ Attention is also drawn to the impact of globalization on the traditional social forces and influences upon the traditional political parties. What merits special mentioning here is the paper entitled "The Middle Way School in the Theories on European Social Welfare and its Influences" by Fan Tao. The paper makes an all-round sorting of the Neo-Left both as a movement and as trend of thought, and confirms that this trend of thought has exerted influences both upon the Leftists and the Rightists. It is actually a concept transcending both parties, thus giving a theoretical explanation to the mainstream system in Europe in the last half of the century.¹² At the same time, the introductions and comments on the unique objective, specific instruments (such as social

⁸ See for example: Lin Yi, "A preliminary probe into the cultural rootcause of the old age insurance in Western countries," *Financial Science* (Caijing Kexue), 2000, No. 4; Xu Xiaojun, "An international comparison of retired employees sharing the results of social development and its reference," *Collections of Economic Papers* (Shijie Jingji Wenhui), 1997, No. 3; and He Chunlei (ed) *An International comparison of Social Welfare*, *Falu Chubanshe*, 2001; etc.

⁹ Xuan Hailin *et al.*, "The crux to the high unemployment rate in the Euro area and its way out," *Research of European Integration* (*Ouzhou Yitihua Yanjiu*), 2000, No. 5.

¹⁰ Qian Chengdan, "In search for social 'justice': the issue of the gap between the rich and the poor in the UK and the evolution of welfare system in the 20th century," *Academic Journal of Seeking Truth* (Qiushi Xuekan), 1996, No. 4.

¹¹ Ding Jianding, "The relations between the Tory and the establishment of the modern social security system in the UK," reprinted in *Social Security System* (*Shehui Baozhang Zhidu*), 2001, April.

¹² Fan Tao, "The Middle-Way school in the theories of social welfare in Europe and its influences," *Journal of Nankai University* (*Nankai Daxue Xuebao*), Philosophy edition, 2000, No. 2.

foundations) of the EU social policy led to an assessment of the role the EU played as a Social Policy Actor, in promoting employment, assisting women employment, and raising the level of health.

The social mechanism of the EU has always been an interesting topic for scholars in Shanghai and Beijing. Some scholars probed into the funding mechanisms and standards of payment, some made distinctions between Redistribution and Social Insurance, the two basic mechanisms of welfare states, some summarized the institutional development of the EU, and explained the origin of the “subsidiarity” on the level of the EU; others distinguished the various social mechanisms of the EU and its member states, and revealed the mutually contradictory and supplementary relations in the social policy issues between the EU and its members, i.e., taking advantage of the large European market to push for reform on the national welfare states level, while at same time drawing forces from the national welfare states for the restraining of the “commercialization” trend on the EU level.¹³

Meanwhile, researchers focused more on the relations between the making of social policy and the readjustment of the economic structure, putting emphasizing that the changes in Social Policy took place as a result of the changes in the economic environment and the transformation of the government’s responsibility. For instance, some scholars analyzed the proportions of general taxes to social insurance fees, and gave explanations to the division of responsibilities and rights in the EU countries by illustrating the sources of the various social policy funds, etc.¹⁴ Moreover, some papers comment on the trend of privatization within the social insurance system in the EU countries that the basic state pension system for the old aged administered by the government and the subsidiary annual pension run by private companies are supplementing and complementing each other at the same time. However, the papers keep the basic framework of the social security system in the member states unchanged.¹⁵

Conclusion

Based on the preliminary statistics of the research done by Chinese scholars on the social policies of the EU and its member states in more than twenty years, we discover that the EU countries, being the birthplace of the modern welfare states, have been receiving ever increasing attention from China, a country undergoing great social transformation. Among the several thousand kinds of descriptions and reports on the social policies in the EU countries, the majority are descriptions of what was seen and heard. In more than one hundred kinds of related studies, one-fifth are books, the rest are papers, both long and short. The 80 papers that we’ve made statistics on were published in more than 40

¹³ Zhou Hong, “‘The Third Way’ and the social model in the EU,” *Europe (Ouzhou)*, 2000, No. 5.

¹⁴ Zhong Xiaomin, “A comparative study of the sources of funding in EU social security system,” *Theories of Finance and Economy (Cai Jing Luncong)*, 2001, January.

¹⁵ Chou Yulin, “Major problems in the social security system in the EU countries and their reform,” *the Copied Materials Published in Newspapers and Journals* (Shu Bao Fuyin Ziliao) published by the People’s University, Social security volume, a feature article in 2001, No. 2.

journals, among which only three have accumulated 5 papers on the subject. They are *World Economy* (*Shijie Jingji*), *Europe* (*Ouzhou*) and *Research of International Economy and Trade* (*Guoji Jingji Maoyi Yanjiu*). The papers carried in the last journal were found in the same issue. Not only are the publications scattered, the topics, methods and perspectives of the research on the social policies of the EU and its member states were also very widely dispersed. Although great efforts were made by the People's University in collecting papers on social security and welfare states to compile *the Copied Materials Published in Newspapers and Journals* (*Shu Bao Fuyin Ziliao*), research in European social policy are submerged in the huge quantity of papers on China's social security and social welfare, and can hardly form a forum or a publication base of the related subject. Under this chaotic situation of the academic market, viewpoints and methods will inevitably enable China to gain an in-depth understanding about the social policies of the EU and its member states.

The domestic-demand-orientation has been the most outstanding characteristic of China's research in the social policies of the EU and its member states. In our statistics of the 80 kinds of papers, those clearly showing this orientation, or even entitled as "inspirations on China," "for China to learn" or "enlightening to China" take no less than 30 kinds. This guiding orientation has aroused interest in doing research on European society. However, it may possibly also have limited our vision in observing Europe.

Besides, the continuity of scholars in doing research on European social policy in China is very shaky. Few scholars engaged in the study for a long time, and many authors came from various social science studies, or various departments of the government. Restrained by their work units, they had little opportunity in exchanging views and making dialogues on issues of common interest. Among the present authors, few have had special training in doing research on social policy. Among the groups of scholars doing research on foreign issues, those engaged in studying individual countries lack dialogues with EU specialists; the same goes true with specialists of social policy and specialists of foreign affair issues. The dispersed author group is the key reason to why there is no continuity in academic research on European social policy and why the research can hardly be large, and form a mainstream.

Nevertheless, the research on European social policy in China has begun, and achieved rapid development in recent years. Research on the last of the three major systems in Europe, namely, Democratic Politics, Free Market Economy and Social Welfare, lags behind the first two. However, the Chinese people came to see the importance of the research on social welfare, and more efforts are being made. More research results that are in-depth, comprehensive, accurate, and contains real knowledge and insights are earnestly expected.

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