



Relating the State and Voluntary Agencies in Welfare Politics: A Social Construction Approach*

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This paper aims to describe an institutional account for the varying relationship between the state and voluntary agencies in delivering social welfare services. By addressing how two traditional opponents pave a way for relational linkages in terms of social provisions, it elaborates the way of constructing and locating inter-sectoral relations in the context of welfare politics, whose fronts would be moving over time. Against the previous categorization of state-voluntary sector links, primarily focused upon instrumental utilities of the voluntary sector, this study presents an alternative relational linkage model that can be socially constructed by the interactions between state autonomy and organized voluntarism at a given historical condition. Such a historical-institutionalist approach results in four possible categories of mid-ranged institutional solutions (legitimization, mobilization, cooptation, and accommodation), all of which are moving along the variation of welfare regimes as well as historical contingencies.

Keywords: the voluntary sector, state-voluntary sector relations, social construction approach, relational linkages, and institutional adaptation

INTRODUCTION

The last three decades witnessed a rapid increase in the number of voluntary or nonprofit organizations in many countries. Peer self-help groups and community-based organizations

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mushroom, and their functions widely range from advocacy to service provider. The upsurge of the voluntary sector reflects the growth of social movements aiming for greater citizen participation in the formation and implementation of public policy and for greater decentralization of governmental functions. Despite its salient functions, however, the voluntary sector has received little attention from academic publishers and writers. Given that it has been overlooked in scholarly research, the voluntary sector is one of the least understood components of modern society and the political economy of the welfare state in particular.

The voluntary sector in the mixed form of welfare, however, began to be rediscovered by disenchantment with market solutions, which lack in attentions to socially excluded individuals and communities, and market's vulnerability to the changing economic environment in global financial markets. Another reason for growing concerns about voluntary agencies is grave skepticism about the capacity of the state to deliver public services that satisfy user expectations and diverse citizen aspirations. It is in this regard that the return to the voluntary sector since the mid-1970s coincided with both growing national and international economic pressures, and the paralleling retreat of the state from the universal coverage of welfare provision. Such a practical expectation on to what degree voluntary associations could contribute to delivering social services more effectively has moved closer to central concerns, from the periphery of most social policy agendas.

Public concerns over the voluntary sector have been diversely addressed in tune with different social and political backgrounds in which voluntarism is anchored. American and European scholars, for example, approached the functional utility of the voluntary sector from very different angles, respectively. While American social scientists viewed voluntary associations as an essential ingredient of a civil, liberal society on the theoretical basis of Tocqueville's observations in *Democracy in America*, many European scholars found it difficult to see the voluntary sector as an organizational universe of its own, thereby locating it in conjunction with state intervention (Kuhnle and Selle 1992). American scholars' research on the voluntary sector has been mostly done in the tradition of either microeconomics or organizational analysis, whereas European approaches tend to describe its macro-political mechanisms, mainly focusing on the social and political contextualization of state-voluntarism linkages. The formulation of social policy in relation to voluntary agencies, therefore, depends on how policy framers view the nature of the relationship between voluntary organizations and the state.

Nevertheless, the underlying nucleus of state-voluntary links is ground in a moving frontier of the welfare mix, which is shaped by the historical relationships shifting over time between the state and civil society, rather than a static thing (Finlayson 1990). An ahistorical or too narrow view of the sectoral relationship, without serious considerations of historical relatedness, can lead to the distorted identification of the voluntary sector, by highlighting its practical utilities rather than its historical development vis-à-vis the state. Characteristically, in

the United States during the 1980s, the instrumental belief that voluntary agencies are simply substitutes for government service provision spawned a miscalculation of the ability of charities to compensate for cutbacks in public budgets for social service delivery (Murray 1982). In this sense, a macro-sociological and historical perspective on state-voluntary sector relations is necessarily required for comprehensive scholarly analyses for not only locating the voluntary sector in the context of the welfare mix, but also preparing sensible prescriptions of social policy in dealing with voluntary agencies (Horowitz 1999).

Some previous literature relevant to the state-society studies demonstrates that the dominant paradigm for explaining the sectoral relationship has been one of competition, whereupon the state and voluntary associations vie for dominance. It is assumed that the relationship between the two sectors is a zero-sum game in the sense that an expansion of voluntary associations took place in line with the retrenchment of welfare states. This view seems to find support in the writings of both conservative American sociologists such as Berger and Neuhaus (1977) and social policy analysts on the left, such as Donnison (1984). However, it is, more recently, argued that even countries with more state-centered traditions are trying to utilize voluntary organizations in new ways to improve the effectiveness of public services (Ringen et al. 2011). An increasing number of scholars suggest that partnership rather than conflict characterizes the relationship between the two sectors in many countries, though the partnerships were not necessarily of the same type (Evans 1996; Salamon 1995). The effective governance ends in welfare provisions via cooperation between the state and non-state sectors, denying the strict sectorization to some extent. Sectoral boundaries, indeed, are far from constant, but are becoming increasingly blurred and differently constructed (or destructed) by societal interactions.

A missing link in analyzing state-voluntary links lies in lack of theoretical accounts for how to construct a patterned set of welfare relations between the state and voluntary agencies, which can be ranging from competition to collaboration. Such a particular pattern of sectoral relations attains a 'middle-ranged' outgrowth of institutionalizing the two ways aimed for the social construction of mutual recognition: (i) how the voluntary sector responds to state intervention and promotes social changes; and (ii) how the state creates and adapts its institutional devices for regulating voluntary forces. In discovering sectoral boundaries, this paper advances historical institutionalist approach as a main tool to delve into historical formations and evolution of state-voluntary relations, which have been, hitherto, overlooked in social policy studies (Kim 2008). In the end, it suggests that a social construction approach, based on historical institutionalism, needs to be brought onto the front of the relational interpretation of the state-voluntary nexus in order to show varying degrees of its institutionalization processes.

In examining the social construction approach to state-voluntary links, this paper proceeds in three steps. First, it starts by reviewing existing approaches to the state-voluntary mix, with

the special attention to the social construction perspective. Second, it tackles the linkage issues by demonstrating how state-voluntary relations are shaped and changed by variations of social embeddedness and institutional adaptations. Finally, it develops how the two sectors are able to adapt themselves mutually to a given social and political environment, and describe what institutional adaptations have been employed by the government sector in order to incorporate voluntary organizations into a certain form of collaboration. To this end, the autonomy of the state, the degree of organized voluntarism and interactions between them are advanced as critical variables differentiating the linkage patterns of state-voluntary relations.

UNDERSTANDING THE VOLUNTARY SECTOR

It is commonplace that the term ‘voluntary sector’ is slippery and contested due to lack of clarity associated with its concept.¹ The general understanding of the voluntary sector is that it is not for profit and not for statutory. However, this view cannot verify what the sector is or what it is not, because of the voluntary sector’s ambiguity, complexity, and diversity, as well as the ambivalence with which it is regarded. In addition, voluntary activities can move across sectors and much of such action can be blended with the features of other sectors such as the public and the private. As a result, there is no clear definition or category of the voluntary sector and no coherent theory of voluntary organization, its development, and organizational changes.

The confusing and overlapping natures of the voluntary sector may distract the direction of a research into an infertile semantic debate over the definition of the terms, which is, of course, not analytical concerns in this paper. Instead, the need to avoid such semantic traps calls for a bold approach that the key concepts of the voluntary sector can be traced from the distinctive

¹ Given the characteristics of the voluntary sector, the usages of the terms vary according to countries where they are used. The terms used in the United Kingdom and the Scandinavian countries mostly converge on the ‘voluntary sector’. The ‘voluntary’ refers to the manner in which the organizations are set up and the voluntary nature of membership or other forms of involvement such as how to collect financial supports. On the other hand, the common practice in the United States and Japan is to use the term ‘non-profit organization (NPO)’, which is suited to both American and Japanese legal circumstances because “the organizations are defined primarily in terms of their eligibility for exemption from federal income taxes on grounds that they are not principally profit-seeking” (DiMaggio and Anheier 1990; Johnson 1999: 145). The clear criterion is that profit maximization and the distribution of profit are not the primary goal of NPOs. Moreover, the definitions and usages of the term continue to be demarcated by many scholars who emphasize one aspect of the reality represented by these organizations at the expense of overlooking or downplaying other aspects. Characteristically, Kramer (1981: 1-8) rejects the term voluntary sector and non-profit sector which have been respectively used in Western Europe and in the United States, and suggests a new term ‘third sector’. The term assumes a third type of organization, with a different style of organizational behavior as compared to private business or state bureaucracy. Also, Ware (1989: 6-9) uses the term ‘intermediate organizations’ instead of the voluntary or non-profit sector. Intermediate organizations reflect some particular features of voluntary agencies: the boundaries between the state and private institutions are difficult to be drawn and intermediate organizations lie between the state and the profit-making sector. There are numerous institutions that may be described as merely semi-private or semi-public.

nature of social and cultural backgrounds in which voluntarism is formed, while simultaneously making appropriate use of the broad default definitions that are already accepted by international scholars as the characterization of the voluntary sector. For the analytic convenience, the term voluntary sector is primarily applied in this paper, except when we deal with specific cases about the United States or quote from authors who use other terms. As a broad conceptualization of the voluntary sector, we adopt its default definition developed by the Johns Hopkins Comparative Nonprofit Sector Project, which covers organizations that are formal, nonprofit distributing, constitutionally independent of the state, self-governing and benefiting from voluntarism (Salamon and Anheier 1996). Within this thick description of voluntary associations, further specific explanatory accounts are necessarily required for targeted cases which are embedded in distinctive historical and cultural milieus.

Contested definitions of voluntary agencies notwithstanding, their practical utility in lights of welfare provision is unexceptionally highlighted as being salient and effective to the extent that they rightly take over the welfare mission which the state or markets should otherwise have delivered. There are, by and large, three different approaches to identify policy utilities of the voluntary sector in relations to the state or other sectors: economic, sociological, and social construction approaches.

The Economic Approach

The economic approach to the voluntary sector does often overlook the underlying organizational rationales of voluntary associations or does it fail to investigate organizational cultures. Rather, it examines their functions and contributions to resource allocation and social welfare. This approach is presented by the American micro-economic school which views voluntary agencies either as a replacement of the twin failure of market and state, or as an institutional option to reduce transaction costs in the process of service delivery (Estelle 1990; Rose-Ackerman 1990). From the economic perspective, nonprofit organizations are considered as a more trustworthy actor because they have fewer incentives to deteriorate service qualities in order to increase profits, thereby reducing information asymmetries between producers and consumers.

Micro-economic analyses, however, have been criticized on various grounds. Regarding comparative purposes, their greatest deficiency comes from the fact that they cannot explain cross-national variations in the size and composition of the voluntary sector, due to excluding variables external to the micro-economic model, which include social, ethnic, and ideological heterogeneity. Also, this approach fails to spell out why market and state only are not able to compensate each other's shortcomings, instead of resorting to the third sector. Moreover, American sociologists criticize such an economic method, mainly by revealing its inherent limitation: it cannot deal with the effects of a wide range of institutional factors and state policies (DiMaggio and Anheier 1990). Economic models tend not to reflect the essentially

symbiotic and mutually independent nature of the government-nonprofit power relations in most countries. The economic approach, which is heavily relying on opportunity costs of rational choice and economic utilities of the voluntary sector, is not an appropriate method to describe the overall contours of the state-voluntary sector linkage that requires the existence of governmental sectors corresponding to organized movements of voluntary agencies.

The Sociological Approach

Much of research on voluntary and nonprofit organizations by sociologists, just like the economic approach, has focused on particular sub-sectors rather than on the inter-sectoral relationship as a whole. The sociological approach tends to put more weight on micro-level observations such as the origins of voluntary organizations and organizational analysis covering behavioral distinctions between nonprofits and for-profits, rather than macro-level analyses that can be relationally combined with other sectors. Nevertheless, it cannot be concluded that sociological perspectives totally ignore the government-voluntary sector relationship, because they design the linkage development from micro-level organizational behavior analysis to its macro-level relations to state institutions. Characteristically, DiMaggio and Anheier (1990) attempt to explain the existence of nonprofit organizations in organizational, sectoral, and societal terms by repositioning 'nonprofit' as a dependent variable, with a significant conclusion that the origins, behavior, and functions of the voluntary sector reflect institutional factors that are chiefly mobilized by the state.

As regards institutional factors, a new sociological institutionalism puts forward that organizations are becoming more homogeneous, and bureaucratic components remain as the common organizational form (DiMaggio and Powell 1983; Meyer and Rowan 1977). Therefore, structural change in organizations seems less driven by competition or by the need for efficiency than by institutional rigidity. Institutional forms of organizational change occur as the result of 'institutional isomorphic' processes that make organizations more similar without necessarily making them more efficient. Accordingly, tracking the changing processes of institutional characteristics of the voluntary sector may help to evince the contours of the shifting patterns of its sectoral relations to the state.

In a much broader sense, a group of sociologists introduce the notion of 'public sphere' as a political space where to identify the roles of the voluntary sector within the terrain of the welfare state (Evers 1995). Wuthnow (1992), borrowing its conceptual basis from Habermas, proposes that the public sphere is built upon the connotation of a mythical arena in which citizens act independently of self-interest or state coercion, by rational rules in enlightened solidarity. The voluntary sector, possibly, remains at the centre of the public sphere, by engaging in social programs established in this middle ground between the state and market. However, we can witness that voluntary organizations are not the only mechanisms by which people can express values, nor do they obviously command more effective rationality than

other types of institution. In no country are they ever likely to control anything like a sufficient proportion of the country's resources on behalf of the state or the market, and informality and small size of the voluntary sector hamper itself to become the best guarantor of surrogates for state provision. More importantly, as Dahrendorf (2001) straightforwardly warns, voluntary associations linked to the government or its subsidies are subject to all sorts of controls and rules, and represent voluntarism only in name due to the problem of the accountability deficit. As a result, either practical or theoretical utility of the voluntary sector cannot be properly assessed without an investigation of the state's institutional intervention into civil society and its manipulation of state-voluntary relations. We, thus, need to gain further knowledge of how the state relates to the voluntary sector and constructs its relations to voluntary agencies through institutional arrangements.

The Social Construction Approach

Beyond sociological and economic approaches described above, a scholarly attempt to combine state intervention and responsive voluntary agencies culminates in a raft of middle-ranged institutional solutions, which are constructed by the intersection between macro-social processes of the welfare state and microscopic behaviors of individual actors in civil society. This approach tends to assume that an appropriate level of independence of the voluntary sector depends on the degree of its autonomy in relations with the state and associated public authorities. The notion of social constructivism in search of the *making* of state-voluntary links, thus, is necessarily tied up with historical institutionalism to demonstrate the evolution of how to incorporate sectoral relations into a particular set of institutional arrangements (Amenta 2003; Thelen and Steinmo 1992). Indeed, it contributes to enriching the understanding of how the voluntary sector responds to state intervention, and marshals its influence in order to shape state policies; simultaneously, it attempts to expand knowledge of how the state invents institutional devices designed to control voluntary forces at different historical junctures. In consequence, the social construction approach helps to reveal the underlying structure of sectoral relations embedded in a given historical condition (Nee and Ingram 1998).

The terms and structure of the social construction are determined not by an instrumental management of the voluntary sector, but by various modes of its interactions with the state (Goodin 1996; Rothstein 1998). At one extreme, the voluntary sector degenerates itself from political challenger against the state to an extended arm of the state. Increased state penetration into the affairs of the voluntary sector prompts an increasing number of voluntary associations to evolve into a 'shadow state' acting in lines with state guidelines (Wolch 1990). The voluntary sector's capacity to act independently and initiate social change is at stake as it remains as a 'para-state apparatus' controlled by public authorities and charged with major service responsibilities that otherwise should be taken by the public sector. This extreme stance that the social position of voluntary organizations is solely constructed along with state

intervention brings about unbalanced frameworks within which the countervailing value of the voluntary sector continues to be sidelined.

By contrast, 'corporatist' perspectives come to the fore as we need to see mutual penetrations between the state and voluntary agencies on a relatively equal basis. In theory, corporatism has a flexible utility of democratic governance in the sense of providing the middle ground where public authorities and societal groups sit together to reconcile their interests towards the state-society partnership for welfare provisions. The recognition of voluntary organizations as a partner participating in state decision-making becomes a political solution accompanying the notion that civil society and the state are able to grow hand in hand in a positive fashion. In this regard, the voluntary sector offers a buffer zone between the state and civil society, in which institutional designs to promote state-voluntary sector partnerships mitigate political conflicts and enhance social cohesion (Lehmbruch 1984; Marshall 1963).

In a nutshell, the social construction approach contributes to eliciting a middle-range emulsion between the state's macro-level structures and the voluntary sector's micro-level reactions, even if the power balance of state-voluntary relations is always shifting over time in accordance with different sets of historical contingencies (Giddens 1979; Lewis 1995). Despite the oscillation of width and intensity of the social construction, the underlying common rationale of government-voluntary sector partnerships in the mixed economy of welfare leads to *state provision via voluntarism*: the state is assumed to deliberately promote its institutional adaptations in order to mobilize and regulate voluntary welfare contributions, which result in enhancing the effectiveness of governance in societal dimensions of welfare.

INCORPORATING THE VOLUNTARY SECTOR INTO THE WELFARE POLITICS

While the voluntary sector is the point of departure, the voluntary sector cannot be properly understood without a better understanding of its relations to the state. The relationship between the state and voluntary associations has grown out of different political, social and cultural contexts. Such relations, then, account for organizational, ideological and service-delivery structures of the voluntary sector in modern welfare states. Accordingly, debates over possible scenarios regarding this sectoral relationship necessarily involve a considerable degree of complexities of the macro-micro link between the state and civil society (Münch and Smelser 1987). Indeed, a study of state-voluntary relations is also a study that comments on the more general question of the state and civil society, along with the political economy of the welfare state (Deakin 2001).

However, it is not easy to trace theoretical or empirical observations on the voluntary sector in classical volumes of social policy or sociological welfare studies. Esping-Andersen (1990) failed to include voluntary resources for welfare provision as one of the internal dimensions for

measuring distinctive features, such as the nature of state intervention, the stratification of income inequality, and the process of de-commodification. Although he admitted the importance of voluntarism in his later work (Esping-Andersen 1999: 35), his predetermined typology of the three welfare regimes has no room to include any critical attempts for locating voluntary agencies in the welfare politics, thereby losing the analytical censor of dynamic changes in state-voluntary sector relations. Korpi's power resources theory (1978), based upon the working class in welfare capitalism, might be able to provide a possible frame through which the collective action of voluntary agencies would be interpreted as a new catalyst to assemble social forces for welfare reforms. But, his explanatory coverage, mainly, captures old social movements, which are usually fitted in labor unions, rather than the voluntary sector or other civil society organizations. Likewise, T. H. Marshall (1963) makes out the realization of 'social rights' as the ultimate destination of state-civil society relations out of civil rights and political rights, but passes over a clear indication of voluntary contributions in welfare institutions.

The existing literature on the East Asian welfare model also lacks discussions about the relationship between the voluntary sector and the state. By advancing the Confucian culture as a prominent theme of East Asian social policy, many scholars emphasize the role of a "traditional, Confucian, extended family" as the fundamental positive sources of low public expenditure and household economy welfare states (Jones 1993: 214; Jacobs 2000). Such a reification of the Confucian welfare state on the basis of the informal sector, however, results in downplaying welfare contributions of other social sectors and sidelining the variations of welfare systems across East Asian countries under the rosy rationale of the positive 'welfare Orientalism' (White and Goodman 1998). Nevertheless, scholarly efforts to reveal the secrecy of the East Asian welfare regimes have, hitherto, remained under some limited tasks of either defining East Asia's state welfare in a new term of 'productive welfare' which is distinctive from the Western welfare state or comparing the East Asian model with other developing zones of Africa, Latin America, and Eastern Europe (Gough 2004; Haggard and Kaufman 2008). Indeed, little discussion of state-voluntary sector relations in East Asia has found its way into print, despite the fact that the growing influence of civil society in this region inevitably tends to change the landscape of its relations to the state and reinforce the positional power of voluntary agencies when they meet the state (Kim 2008).

Accordingly, locating voluntary agencies into welfare politics requires some new approaches to deal with the controversial linkage of the state and voluntary associations. Overall, there would be the two distinctions on state-voluntary links: the 'functionalist' perspective, which favors such linkages, and the 'liberationist' perspective, which argues for fewer linkages. It is fairly notable that it is quality and not necessarily quantity of linkages that determines the ramifications – whether positive or negative. In many cases, state-voluntary relationships have commonly been thought of as competitive or conflictive, and government

has been looked upon as a body which has actively infringed upon the autonomy of voluntary organizations. However, Salamon and Anheier (1996: 43)'s data on voluntary associations in seven countries challenge the 'conflict theories' and thus "lend credence to an alternative theory that sees government and the non-profit sector as potential partners and allies". Alongside the positive notion of government-voluntary sector partnerships, it can be also argued that the establishment of such rapprochement must be based on a strategic vision of the voluntary mission and how best it can be realized by non-voluntary forces, particularly public authorities. Indeed, it is vital to remember that many voluntary organizations continue to insist on strict autonomy, whereas many governments remain determined to repress and control voluntary operations. In consequence, all types of the state-voluntary nexus include a gear-changing complexity of the social construction, which range from productive positivism to coercive negativism.

Such debates over a particular set of linkage between the state and voluntary agencies have been placed at the centre of how to promote service provision via the voluntary sector. By tracking the historical development of relationships between the British government and the Charity Organization Society in the late nineteenth and early twentieth centuries, Lewis (1995) concludes that the provision of welfare in Britain has always been mixed by the combination of voluntary forces and statutory agencies, even if the balance of power between the two sectors had been consistently challenged and changed. Such a sectoral linkage is also endorsed by Webb and Webb (1912: 225-35)'s earlier work, which shows that a conceptualization of the government-voluntary linkage had been shifted from the relationship as separate spheres to one as active interactions that they describe as the idea of the 'extension ladder' of the public sector. The overriding notion of these scholarly accounts for state-voluntary relations in the early stages of modern state-building is mostly confined to how the state mobilized voluntary welfare associations as a shadow state agency operating on behalf of the state.

Further development of the welfare politics in the changing boundaries between the two sectors is elicited by the twofold elaborations in postwar welfare states. First, initiatives of the sectoral relationship have been increasingly taken by non-state actors, rather than the state itself. According to Deakin (1995)'s research on state-voluntary partnerships, it is a gross oversimplification to portray the evolution of the voluntary sector over the postwar period as being merely a consequence of the retreat of the state. Other variables such as changing values and external factors – for instance, democratization, economic crisis, or collective forces of the voluntary sector – are as influential as the growth and subsequent shrinkage of the state's sphere of action. Second, contemporary discussions of the state-voluntary welfare mix in Western democracies are stretched out to take in such a new societal issue as participation and active citizenship (Hirst 1997). The creation of centralized voluntary associations, which emphasize solidarity among voluntary organizations and independence from the state, facilitates the process of politicization and its associated social movements. In doing so, the

voluntary sector, despite its internal disruptions and limits, can provide community involvement, client focus, local empowerment, and avenues for democratic engagements in propelling welfare provisions as the realization of social citizenship. The recent weights of linkage analyses, thus, concentrate on community-based voluntary associations providing relevant welfare services and sustaining social capital.²

All in all, a consistent theme in the government's stance towards the voluntary sector would be identified with the fact that the linkage effort has always existed in order to utilize voluntary welfare provision in reducing the costs of government provision in a changing social and political environment. The voluntary sector, in turn, has been expanding its sphere of influence vis-à-vis the state by not only mobilizing organized power for participatory involvements but also being incorporated into the state's governance institutions.

CATEGORIZING THE STATE-VOLUNTARISM LINKAGE

Many scholars in search of state-voluntary linkages in the social policy context have devised a model or typology by which their varying contours can be properly measured and predicted (Brinkerhoff and Brinkerhoff 2002). While voluntary associations recognize that they cannot insulate their members or clients from external political systems due to their innate weaknesses such as insufficient manpower, financial shortage, and the lack of expertise, the state, on its part, is aware of the needs and activities of voluntary organizations in the sense that the latter has significant contributions to overall service delivery and often state policies as well.³ Beyond minimal efforts, both government and voluntary organizations can benefit, in a variety of contexts, from a more deliberate pursuit of cooperative relationships. Such a mutual gain is more likely to lead to a blurring of the boundaries between the two sectors, thereby expanding

² The functions of voluntary agencies in the context of the welfare mix tend to be best known for undertaking one or other of these two main forms of activity: the delivery of basic services to people in need, and organizing policy advocacy and public campaigns for change (Kendall 2003). Furthermore, voluntary agencies as service providers or advocacy groups take respectively different contents of welfare missions: while the former contains welfare provisions based on community development, self-help, and paternalistic familism at the local level, the latter represents organized voluntarism such as policy renovation, the empowerment of grass-root movements, and other politically-motivated associations at both local and national levels.

³ According to Salamon (1995: 44-48), voluntary failure, alongside the twin failure of the state and markets, responds to the question of why the voluntary sector relates itself to the state over time in the face of the state penetration into the sphere of voluntarism. The tenets of voluntary failure present the inherent limitations of the voluntary sector as the main causes for its restrained position which leads to collaborate with the state in order to overcome its own resource deficits. From this perspective, the voluntary sector is characterized as inherently fragmented, variable at the local level, devoid of hierarchical authority, amateurish with the lack of professionals, and capable of being readily mobilized for urgent implementation of national policy the state initiates. The 'loose and baggy' nature of the voluntary sector, thus, brings about resource inadequacy, creating the difficulties in fostering self-reliance, and hence calling for the government support (Kendall and Knapp 1995). As a rule, voluntary failure comes to derive cooperative relationships between voluntary organizations and the state in addressing public welfare problems by exchanging the government's financial support in return for voluntary activities as service providers.

the number and range of quasi-public organizations. Therefore, it may be seemingly impossible or useless to classify the changing relationship between the two sectors into several fixed types that are artificially preset. Nevertheless, categorizing state-voluntary relations is still meaningful for the reason that systematic efforts for taxonomy and modeling provide a handy tool for quick comparisons between different welfare regimes, the selection of preferred types, and the invention of programs and projects accordingly. The categorization, indeed, is designed to assist governments, voluntary organizations, and other practitioners, when they need to identify and promote the most productive state-voluntary sector relationship under a specific model of contextualization. By and large, the linkage model can be carved up by two broad but conflicting patterns: 'instrumental' and 'relational.'

Instrumental Linkages

The first pattern is deeply anchored in the economic efficiency of the nonprofit sector, with the particular reference to its functional or instrumental utilities in terms of service provision. By relying on different strands of welfare contributions that the voluntary sector can provide, Young (2001) divides the changing sectoral relations into three sub-clusters: voluntary agencies as self-governing supplements in parallel with the state, ones as complements to the state in a close partnership, or ones as an adversarial challenger. In supplementary model, nonprofits are seen as fulfilling the demand for public goods left unsatisfied by government. In complementary model, nonprofits are regarded as partners to government, helping to carry out the delivery of public goods, which is largely financed by government. In the adversarial model, nonprofits prod government to make changes in social policy and to hold itself accountable to the public. This formulation of classification seems to utilize and duplicate Kramer (1981: 234)'s earlier classic taxonomy that categorized the service provider role of voluntary agencies as primary, complements, and supplements.

In a more comprehensive respect, Gidron and other collaborators develop an alternative state-voluntary typology with the following four models: government dominant, third sector dominant, a dual system, and collaborative model (Gidron et al. 1992). In the government-dominant model, government plays the primary role in both financing and delivery of social services, whereas the third-sector-dominant model, by contrast, places the voluntary sector in the key role of financing and administering social and health services. The dual system sets government and the third sector alike to finance and deliver welfare services, but the two sectors work separately or parallel to each other. For example, the third sector might supplement government services by using its own funds to fill a specific service niche not covered by government. In the fourth model, the third sector and government work together rather than separately. The authors' final conclusion is that the collaborative model is much more common and desirable than many policy-makers or critics of the welfare state believe. However, this typological formulation does not differ fundamentally from the previous works

of instrumental linkages because it does not present any possible and substantive ways of *how* the state and voluntary agencies construct (or destruct) a particular set of interactive relations.

This sort of instrumental approach, entrenched in the practical fabric of the voluntary sector, may contribute to galvanizing the normative nature of voluntarism as an alternative source of service providers, thereby securing voluntary associations as a secondary replacement of the public welfare. Nevertheless, such a functional social policy categorization encounters difficulties in locating actual paths of causal relations between the state's welfare policies and voluntary responsiveness. With no serious consideration of historical and relational contexts, any accounts for state-voluntary links can be easily entrapped into the web of instrumentality, which views voluntarism only as a means of service provision, lacking in the processes of the construction of sectoral linkages.

Relational Linkages

In comparison with American scholars' reliance on the instrumental aspect of state-voluntary linkages, many European scholars make efforts to elaborate the interactive mechanism laying behind sectoral relations which they consider especially important in, what they label, a 'relational perspective' (Bauer 1990; Kuhnle and Selle 1992: 26-31; Seibel 1990). The first dimension relates to how to measure the closeness of voluntary agencies to the state with respect to scope, frequency and easiness of communications and interactions. Political culture and social systems play an intermediate role in determining how great the ideological distance between the two sectors can be and maintaining the voluntary sector's proximity to the state in either near and integrated forms or distant and separated modes. The second dimension, reversely, involves the independence of voluntary organizations from the state, and hence they may be either autonomous or dependent in terms of financing and organizational control. Whether the foundation of social structure is market-oriented or state-dominated marks out the general profile of state intervention and the resulting dependency of the voluntary sector. Accordingly, combining the two dimensions creates the four variances of relational linkages: integrated dependence, separate dependence, integrated autonomy, and separate autonomy. They all represent varying degrees of the sectoral interaction and its impacts on the relationship formation, which may fill the gaps left by the functionalist approach that assumes voluntary organizations as a surrogate of social service providers.

However, this relational linkage is bound to face two methodological drawbacks in categorizing state-voluntary relations. First, its unawareness of historical consideration may retard us to explore the transformation of sectoral relations, which can be often reshuffled and merged over time in accordance with the shifting power balances between the two sectors. Historical contingencies need to be considered a critical factor to provide socio-political landscapes for such a transformation or reformulation. Second, the lack of historical explanations errs in giving an accurate account for how the state and voluntary agencies would

construct an institutional solution as a final outgrowth of their interactions. Tracing a historical path of institutional arrangements, indeed, presents a sequential evolution of middle-ranged clarifications which result in constructing a specific pattern of state-voluntary links. In response to these weak points, we move on to the next section in search of a sensible underpinning for combining historical and institutional factors within the purview of the relational perspective.

INSTITUTIONALIZING THE MOVING FRONTIERS: STATE AUTONOMY, VOLUNTARY CHALLENGES, AND INSTITUTIONAL ADAPTATIONS

As discussed earlier, locating the state-voluntary linkage in welfare politics entails a nuanced interpretation of its middle-ranged relations intersecting between state autonomy, voluntary reactions, and institutional arrangements that are socially constructed by the two sectors (Kim 2010; Seibel 1990). Categorizing such relational linkages, in the end, comes up with different sets of institutional adaptations embedded in social and historical settings. In this regard, understanding social embeddedness and historical contingencies is the first-order condition required to characterize and institutionalize the moving frontiers of state-voluntary sector relations. Neither government nor the voluntary sector can escape from what is imposed on each of them in lines with institutional apparatuses and national foundations of politics, all of which have evolved in national history with endorsement by ideological justifications (Mahoney and Rueschemeyer 2003). Accordingly, the sectoral linkage does not necessarily follow the instrumental logic of economic superiority in terms of quality and efficiency in providing welfare services.

Voluntary organizations provide a broad span of organizational behavior allowing for efficient provision of public goods, strategic filters absorbing the pressure of social and political tensions, and reformative challenge against the state's social policies. Whatever the function of the voluntary sector may be, it is shaped by the structure of its social embeddedness in a given social and historical condition. It makes sense to assume that the state-voluntary linkage is shaped by the embeddedness structure which, at the same time, steers institutional designs by which the mission of voluntary associations, in turn, is determined in accordance with historical contingencies (Granovetter 1985). Under this historical-institutional framework, we are then able to further extend our discussion to the practical applications, with the instrumental notion that there is a variety of policy options for the use of the voluntary sector as a tool of government actions: subsidiaries, vouchers, contracting, supplements, complements, and collaboration (Salamon 2002).

The structure of social embeddedness, which is the foundation for different linkage patterns, is constituted and articulated by the distinctive mixture between degrees of state

autonomy and degrees of organized voluntarism. State autonomy is referred to as the unimpeded governance of state authorities in the terrain of social policy: to what degree the state is capable to intervene into and control organizational patterns of the voluntary sector, and hence how autonomous the state is in shielding itself from organized challenges from social forces. The magnitude of state intervention is differentiated along a continuum from failed states with a marginalized function of governance to strong states with a high level of social engineering (in either democratic or authoritarian ways). Organized voluntarism is referred to as collective forces of voluntary agencies by mobilizing social movements or delivering their politicized voices to government via organized channels. Likewise, the magnitude of organized voluntarism is differentiated along a continuum from decentralized to a nation-wide collective scope of voluntary actions. On the one hand, small community-based groups tend to play an intermediate and subsidiary role as service providers, which are done on behalf of the state by statutory tools of governance. Peak associations at national level, on the other, intend to play a role in marshalling organized voluntarism in order to coordinate or reverse government social policies. Accordingly, the restricted interaction of small organizations results in relatively strong autonomy of the state, but the active involvement of peak associations can make state autonomy becoming weaker. Thus, varieties of the social embeddedness generate different patterns of government- voluntary linkages that also shape different modes of institutional adaptations under a changing social and historical environment.

As a result, it is worthwhile to note that middle-ranged categories of state-voluntary sector relations culminate into institutional adaptations as a logical corollary of sectoral interactions. Along with varying juxtapositions of state autonomy and organized voluntarism, state-voluntary relations can be grouped into four distinctive institutional arrangements as shown in figure 1: ‘legitimization,’ ‘mobilization,’ ‘cooptation,’ and ‘accommodation’. All four categories of institutional arrangements are entrenched by historical contingencies affecting the

Figure 1. Two Value Differentiation of State-Voluntary Sector Links

		Organized Voluntarism	
		Low	High
State Autonomy	Low	Legitimization	Accommodation
	High	Mobilization	Cooptation

Source : Kim (2008: 824).

profiles and density of interactions between the two sectors. Whereas each arrangement does not necessarily preclude all the patterns in the other ones, a particular character featuring each pattern of institutional settings is much more salient than others in terms of its foundational fundamentals. Also, the degree of these two values, which forks respectively into two levels of 'high' and 'low', needs to be taken as a relative term within which one value can be relationally assessed when it is jointly intersected with that of the other.

The first possibility of institutional combinations is *legitimization*, in which the state and voluntary agencies are both too unstable and disorganized to influence the other's behaviors. Under this historical and social setting, the sectoral relationship tends to hit on the point where the state seeks to preserve its legitimate control over society even though its control is not so effective to stabilize national welfare systems. The state utilizes a minimum of state provisions, limited to a few key social groups, to maintain the state's diminishing legitimacy. In practice, this type of the relational linkage can be found in cases of 'failed states' on a rocky road of state building.

Second, combining high statism and low voluntarism crystallizes into *mobilization*. The underlying historical contingencies of this categorization contain a particular structure of social embeddedness in which state autonomy overshadows organized voluntarism. The weakening of organized voluntarism against state welfare increasingly marginalizes collective actions of voluntary agencies, and makes it possible for the state to penetrate society and achieve coercive compliance from civil society. This category identifies the state as a strong regulator whose main tasks are to muster resources from the voluntary sector and force voluntary agencies to take over the mission of service provisions on behalf of the state.

Third, *cooptation* is an institutional tactic of neutralizing or controlling over a minority by assimilating them into the established chain of governance (Cawson 1985). This pattern, more often than not, takes place in the structure of social embeddedness where the state still remains in a relatively high degree of autonomy but faces an increasing organized challenge from the voluntary sector. By incorporating selectively the limited number of influential voluntary actors, the state aims to mute social disorder and lock the selected groups under the government's controlling system. Cooptation tends to end up as political manipulation, rather than the promotion of welfare benefits, but it creates a positive effect of securing peoples' participation in the making of state policies even in an incomplete fashion.

Fourth, *accommodation* is based upon interactions between a relatively low degree of state intervention and further strengthened collective actions of organized voluntarism. Under this structure of state-voluntary relations, the state, which faces assertive challenges of advocacy voluntary groups, is supposed to deteriorate into passive acceptance of social demands for reforming public welfare schemes. The expansion of organized voluntary forces leads to the horizontal development of stronger networks that grow into peak associations at the national level (Kendall 2003: 66). The politicization of social policy issues, together with the expansion

Table 1. Welfare Regimes and Voluntary Agencies in the Developed Economies

Type of welfare state	De-commodification (Organized voluntarism)	Inequality & stratification (State autonomy)	Integrated patterns of voluntary forces
Liberal (American)	Low	High	<i>Mobilization</i>
Corporatist (Franco-German)	High	High	<i>Cooptation</i>
Social democratic (Scandinavian)	High	Low	<i>Accommodation</i>

of social welfare movements, prompts the state to accommodate deliberately voluntary demands by adapting its institutional arrangements to the changing power balances between the two sectors.

Four categories of the sectoral linkage described above can be further stretched out to enhance their theoretical and practical utilities by juxtaposing them to other classical welfare theories. For now, as a start, we focus on a workable connection between the four patterns of state-voluntary relations and Esping-Andersen’s three worlds of welfare capitalism. Despite the absence of a clear-cut articulation about the voluntary sector in his welfare triad of state, market, and family, Esping-Andersen’s welfare regimes are possibly linked to some patterns of the sectoral linkage by decoding state autonomy and organized voluntarism in accordance with alternative interpretations of de-commodification and stratification.

First, de-commodification could be translated as a logical outgrowth of organized voluntarism in the sense that de-commodification comes about “when a (welfare) service is rendered as a matter of right, and when a person can maintain a livelihood without reliance on the market” (Esping-Andersen 1990: 21-22). A loosening of the commodity status of individuals is facilitated by not only bringing social rights into labor markets where the welfare of individuals comes to depend entirely on the wages and labor contracts, but also organizing their labor power for emancipating them from market dependence. In this regard, the introduction of organized voluntarism as an expression of social rights implies a politicization of voluntary agencies claiming the modification of governments’ social policies embedded in quasi-market logics. In so doing, it results in accelerating the process of de-commodification. It can be therefore assumed that the relationship between de-commodification and organized voluntarism is shaped more likely in direct proportion. Likewise, the stratification dimension of Esping-Andersen’s models could be further tailored to the notion of state autonomy from the viewpoint of state-voluntary sector links. Stratification has been understood as a political purpose of the welfare state in terms of its societal impacts: promoting social dualisms by stigmatizing recipients of public services and legislating distinct programs for different class groups, thereby, consolidating divisions of social class and their resultant peaceful order of

social relations. Founding inequality and stratification as a social norm, thus, leads the state to enjoy highly autonomous authorities aimed to control class politics. The more welfare programs are strategically designed for purposes of stratification, the more state autonomy is further enhanced to regulate the relationship between citizenship and social class.

At new intersections of these two valuable ends, the three types of Esping-Andersen's welfare regimes are correspondingly associated with distinctive institutional patterns of incorporating voluntary agencies in their own contexts of political economy. In 'liberal' welfare regimes such as the United States, means-tested social-assistance offshoot, more often than not, generates social stigma, and involves a low degree of de-commodification that all citizens but the most desperate are compelled to participate in the labor market. In practice, as Bauer (1990) argues, the American voluntary sector has developed along its distinct political embeddedness in 'market orientation' where voluntary agencies' dependence on the market brings about the deepening of their commodification which hampers them to organize voluntarism for political actions and the state shields its autonomy from voluntary challenges by prioritizing stratification through the residual welfare coverage. The overriding governance power of the state by means of market orientation confines the role of voluntary associations to service delivery on behalf of the state, rather than policy advocacy (Katz 1986). This is equivalent to the *mobilization* of voluntary contributions for the purpose of service provision.

'Corporatist' regimes are commonly characterized by compulsory state social insurance with fairly strong entitlements (de-commodification) and the establishment of particularly privileged welfare provisions for some targeted groups such as the civil service (stratification). While the introduction of compulsory social insurance by conservative reformers such as Bismarck is the state's strategic reaction to political protests of voluntary forces, selective welfare schemes are intended to maintain social dualisms and preserve the state autonomy intact by co-opting some centralized nationwide voluntary associations and intensifying the decentralization of organized voluntarism. This corporatist tradition as such a highly advanced strategy of state governance was pursued mainly in Germany, Italy, Austria, and France, with the variations of the purview where the state and voluntary agencies discuss the scope of status-specific insurance funds. Whereas in France linkage between government and the voluntary sector is based on actors with limited scope for action under the government's control, in Germany voluntary actors have a wide scope of action, linking the vertical levels of interaction as concertational actors (Seibel 1990). The relational pattern of state-voluntary links in such corporatist regimes comes up with the form of *cooptation*, which is instrumental for rewarding the selected agencies' loyalty to the state, thereby deliberately drawing a line between these voluntary groups' exalted social status and the others who are excluded from the mainstream.

The 'social democratic' welfare regime translates into a mix of highly de-commodifying and universalistic Beveridge-type programs; all strata are incorporated under one universal

insurance system without the specification of targeted groups and de-commodification of social rights is extended to all classes in society. This formula entails a high level of organized voluntarism in the sense of the realization of social rights that the voluntary sector is clearly one of the dominant forces behind welfare reform. By contrast, the degree of state autonomy, in terms of its political seclusion from organized demands of civil society, is relatively in downturn due to its full commitment constructing a universal solidarity in favor of the welfare state, as well as its preemptive responses to the costs of welfare programs and full-employment guarantee. The state's proactive institutional efforts to accommodate organized voluntarism in a positive fashion ultimately create the enhancement of cooperative capacities for individual independence between the state and voluntary associations. This *accommodation* type has been evident in Scandinavian welfare states integrating the voluntary sector into welfare regimes that work for the realization of de-commodification and the lessening of inequality (Kuhnlé and Selle 1990). In particular, Norway demonstrates that the state's affirmative integration of voluntary organizations into the process of decision-making makes it easier to obtain social consensus on public welfare policies (Grindheim and Selle 1990). Important democratic values in Norway are taken care of by either consulting voluntary agencies as a representative of civil society, or treating voluntary demands as an alternative particular interest in opposition to the welfare state.

As a result, linking Esping-Andersen's three types of welfare regimes and voluntary agencies in the mixed economy of welfare provides us a heuristic utility for classifying the social construction of institutional adaptations to embrace voluntary forces in the context of welfare politics. Nevertheless, there are still two missing links in this intersection that we need to tackle as tasks ahead. First, this linkage of the social constructs is limited to only Western developed and democratic societies, rather than developing countries. Emerging democracies or developing economies should be the next target to be included in this formula as the forth type of welfare regimes which might be showing a mixture of liberalism and socialism in accordance with the evolution of civil society. Second, it fails to provide explanatory tools of historical changes in institutional arrangements for incorporating the voluntary sector in this nexus. While Western democracies are considered already-stabilized societies which are well fitted to a certain type of the linkage, developing countries can be seldom categorized as one specific pattern of state-voluntary linkages because frequent changes in their social and political milieus transform institutional foundations of the social construction embedded in historical contingencies.

CONCLUSION: BRANCHING PATHWAYS AND THE STRUCTURING OF ALTERNATIVES

As Townsend (1976) aptly pinpoints, social policy agendas need to be reviewed through

macro-sociological lenses, in order to provide microscopic interpretations of social policy with macroscopic contexts of social transformation. Placing state-voluntary relations into welfare politics is not a simple and mechanical process which focuses on a practical utility of the voluntary sector, but a relational and multifaceted adaptation to social changes over time in shaping distinctive patterns of sectoral relations. Indeed, state-voluntary links can be seen as a social construct between forces from below, in the form of organized voluntarism, popular constellations, and collective actions of various descriptions, and forces from above, in the form of state apparatus of control and governance. That relationship has been a shifting one, regulated by the relative strength of the competing parties and by the social embeddedness constructed by interactions between the two sectors. As a result, some different modes of mixed governance in the terrain of welfare provision are created in the meeting ground of the state and civil society. This study, in this regard, presents the four modes of institutional adaptation categorizing different syntheses of the state and voluntary agencies. Furthermore, such a relational account provides an explanatory value of understanding the changing contours of state-voluntary links, which is extended to the search for the ways of connecting three of the four institutional arrangements to Esping-Andersen's traditional classification of welfare regimes.

Regardless of positive or negative interpretations of voluntary agencies in the welfare mix, a common feature of state-voluntary sector relations can be marked as 'social provision by voluntary agencies.' This is all about how the state enhances *the effectiveness of welfare governance* in incorporating social partners for delivering social welfare services (Ringen et al. 2011: Ch. 4). As concluding remarks, three points need to be suggested in terms of welfare governance. First, it is important to remember that voluntary agencies always continue to undertake the role of service provisions, no matter how the voluntary counterpart to the state and its resultant type of the welfare mix vary in accordance with the shifting power balance between the two sectors at given historical contingencies. Accordingly, the voluntary sector is one of the best strategic targets the state can opt for as a cooperator or replacement for its welfare mission. Second, the state constitutes the welfare mix by excluding the task of service delivery from the statutory responsibilities and instead assigning it to the voluntary sector in return for providing general directions and public financing. The degree of dilemma faced by the voluntary sector due to the state's financial intervention, therefore, depends upon the degree of the state's institutional capabilities in marshalling voluntary participants in government programs. Finally, further investigations on the state's institutional adaptations and ideological social engineering, together with how to mobilize public financing, would be at the center of success or failure in state provisions via voluntarism. Precisely, the task ahead is to press on the empirical verification of this theoretical notion in comparative perspectives.

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