

Prosperity and welfare dimensions in change: an analysis on the basis of 43 countries

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Prosperity and welfare dimensions in change An analysis on the basis of 43 countries

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1. Performance criteria for comparing societies in change¹

Overview

In the world division of labour Germany occupies a privileged place: This can be seen on the basis of the result, in summary by the standard of living, measured as average income. The privileged position in the standard of living can only be maintained if Germany still takes a high proportion of qualified labour in the world division of labour. In the long run it may only be distributed what has been produced before, production and distribution have to be considered in connection with each other. And both are rooted in the interests and values of society and in its institutions.

Due to the peaceful revolution of 1989 Germany had the chance to reverse the division of a nation into two states as a result of World War II through a transfer of institutions. The embedding of entire Germany in a European and transatlantic coordination mechanism is, on the one hand, a favourable way to make the capacity useful for the overall development, but on the other hand to democratically limit it, too.

The re-unification of Germany means a decline in the average standard of living from the perspective of the old Federal Republic and at the same time a material improvement for the newly-formed German states.

These special conditions in Germany should not let us forget, however, that the discussion on competitiveness had already begun before 1989. But from that time period on the globalisation of trade and competition has experienced a new boost, since now the "Second World" was becoming a stronger competitor on the world market.

As a counter-strategy to the globalisation of competition, regional trading blocs in Europe, North America, and East Asia have been initiated. The European single market, enlarged in 1993, has progressed furthest concerning integration.

In this context, I hold the view that the competition is by far the most dynamic force behind social development. As already Bornschier (1996) has advocated, the competitiveness of states is embedded in their social structure and institutions, and some of the conditions and factors shall be elaborated on (see chapter 3). The education system as a whole can be seen as a pre-condition of innovation and competitiveness. The various countries also differ in the logic of their educational regimes. When measuring the innovative capacity of countries we distinguish between investments in research and development as input and its resulting output.

¹ The following article summarizes the most important results of the study "Holtmann, Dieter: Dieter Holtmann The wealth and welfare of nations in change. Prosperity versus environmental sustainability, Innovation versus social security, equality of participation versus womenfriendliness and migrant-friendliness, social integration versus autonomy in international comparison. Aachen 2017: Shaker Publishing Company ". The detailed tables with source information cannot be documented here for reasons of space.

My theoretical approach is to expand the "three worlds of welfare capitalism" by Esping-Andersen (1990) by the "familistic" model of welfare state protection at a rather low level, the group of post-socialist countries that are in a process of differentiation, and the productivist welfare regimes of East Asia that are eager to have success on the world market. The different welfare regimes are according to my model anchored in different political regimes and production regimes, with which different modernisation paths can be distinguished (see chapter 2). The social security systems in the status-preserving version of the Bismarck tradition and in the universalistic Beveridge tradition with a high level of security (as they have in Scandinavia) and a low level of security (as in the economically liberal countries) are analysed using the concept of welfare regimes according to Esping-Andersen (1990), which distinguishes three different logics of welfare production in the triangle of the state, market, and family. Within the Bismarck tradition I distinguish the versions with a high level of security (as in Germany and other continental European countries) and with a low one (as in the Southern European countries). Furthermore, I consider the group of post-socialist countries of Eastern Europe which are in a process of differentiation. As a sixth group of countries I examine the productivist welfare regime of East Asia which aims at the economic advancement through export success on the world market. In addition, as emerging markets all BRICS countries are considered due to their growing importance.

The global financial crisis starting in 2008 and the euro crisis since 2011 are the current challenges for the development of prosperity and welfare in different countries and welfare regimes (see chapter 4): the bursting of the housing bubble in the US resulted in a worldwide credit and banking crisis due to the global marketing of the credit securitization. Most involved and therefore also particularly affected by the banking crisis were the United States, Great Britain, Iceland and Ireland. The credit crisis was followed by a major recession in which the growth model of the Baltic countries which was based on credits, financed in foreign currency, suffered the deepest crash. In the Great Recession export-oriented nations such as Germany also crashed heavily, however because of their strength in exports they recovered particularly fast with the global recovery, too. Because of the necessary bank bailouts due to the world financial crisis and the necessary stimulus programs due to the great recession the national debt strongly increased in many nations. Ireland, Iceland and finally Spain were especially affected by the large banking crises. Given the poor competitiveness of Greece and Portugal in the Great Recession they had to deal with deep economic crises. The disclosure of the amount of the Greek national debt was the starting point of the following crisis of the euro, which revealed some weaknesses in the design of the euro zone.

Concerning social security I distinguish between the provision by investing in education and the follow-up care by social services (see chapter 5.1). In particular through investment in education one can improve the population's

capability to autonomy in the sense of actually realising formally free choices (see chapter 5.2).

The prosperity of a country (see chapter 6.1) may be pursued institutionally in different ways. It is one of the characteristic differences of societies, whether the gross inequality is kept low on the basis of community values such as in Japan, or a low net inequality is achieved by welfare state redistribution as in Sweden, or whether the economic dynamics are accomplished by an economic liberalism that accepts inequalities in the distribution, such as in the USA. Equality of participation in income and education will be discussed in chapter 6.4.

The economic coping with the global financial crisis developed differently in the various countries and welfare regimes (see chapter 6.2): the familistic countries of Southern Europe have stagnated at best in the context of the world financial crisis and therefore stayed behind in the level of prosperity compared to the other countries, while the productivist East Asian countries, especially South Korea, as well as China belong to the economic winners in the context of the world financial crisis.

The other side of prosperity, the environmental burden, as well as the regeneration efforts will be examined in chapter 6.3.

The changes in production are not well understood without the changes in reproduction, since employment and private housekeeping are closely intertwined (see chapter 7). Since the division of labour in production and reproduction is highly structured by gender, gender relations play a major role in the range of variation of the different societies. Germany is in particular compared with the prototypes USA, Sweden and Japan: the United States are understood here as a prototype of individualistic and economically liberal modernisation; Sweden as a prototype of an individualist modernisation with the welfare state as safety net; Japan finally is here characterised as a prototype of conservative modernisation, while Germany ranks in this framework rather in a medium zone. The womenfriendliness of countries is compared on the basis of the participation in politics, labour market, and education system.

In the population structure significant changes take place and simultaneously the forms of life are changing, One aspect of change are migration processes. Therefore, the migrant-friendliness of countries and welfare regimes is compared in the dimensions of openness towards migration and the participation of the migrants admitted (see chapter 8.1). Given the differentiation of life forms, the societies are compared in order to determine how well the social integration – into the labour market (“having”), in supporting networks (“loving”) and in the civil society (“being”) – succeeded (see chapter 8.2).

In summary, the performance of the various societies and welfare regimes will be compared on the basis of the quality criteria, established in advance in chapter 1 (see chapter 9).

Concepts of welfare and quality of life

Welfare includes, on the one hand, the individual quality of life, and on the other hand, the public infrastructure.

While the *individual quality of life* was formerly conceived in the Swedish model of welfare research precisely in terms of resources, meanwhile a broader understanding has been proposed, see for example “Having, loving, being: An alternative to the Swedish model of welfare research” by Allardt (reprinted in Walnut/Sen 1993). A relevant accentuation was proposed by Sen, Nobel laureate in economics: You must have capabilities (competences and capacities), to actually realise opportunities of freedom of choice (see Sen 1993: Capability and Well-Being).

In international comparisons, since Esping-Andersen 1990 the *public welfare* is mostly conceived, in emphasising the importance of institutional development paths, in the form of different welfare regimes that contain different welfare goals and levels of public assistance. As ideal types, a distinction is made between a encompassing social democratic-egalitarian Scandinavian welfare regime, a status-conserving continental welfare regime, and an economically liberal welfare regime with need-tested poor relief.

For the international comparison of welfare and quality of life, the United Nations create an annual “Human Development Report”, in which all nations of the world are compared with respect to human resources, productivity, equality, sustainability, and capability. However, due to the multitude of nations observed, many subtle differentiations in the developed countries are not considered.

To capture the *subjective* evaluation of welfare and quality of life, the concept of general life satisfaction and satisfaction with specific areas of life has been developed, which are collected with the help of the methods of empirical social research.

On the issue of performance of welfare regimes

How societies organise and institutionalise welfare, expresses its fundamental values about living together in a desirable way. To emphasise that societies follow certain sociopolitical programs for certain periods of time, in the following the concept of *welfare regimes* (see Esping-Andersen 1990) is used. In order to compare the performance of societies in terms of welfare, criteria of social welfare are developed on the basis of a discussion of socio-philosophical "moral values" (see Goodin et al. 1999). In the following the performance of 43 countries with respect to the selected criteria will be discussed.

Performance criteria for the comparison of living conditions

Goodin et al. (1999) and Merkel (2001) have each worked out criteria by which they want to assess the performance of welfare regimes. Goodin et al. (1999) suggest six moral values without ranking, Merkel five criteria of distributive justice, the numbering expresses his priority (see Table 1-1).

To illustrate potential goal conflicts, I have proposed four polarities in each case between two societally (or socially) desirable goals which are displayed in a star diagram (see Figure 1-1). The goals were all formulated positively, e. g. the antithesis to universalism is the recognition of particularities, which is why a simple equal treatment between groups with different preconditions is not appropriate.

Table 1- 1: Moral values and criteria of social welfare

Goodin et al. (1999): 6 moral values	Merkel (2001): 5 goals of distributive justice
Promoting economic efficiency	4b) Activation through the welfare state
Reducing poverty	1) Preventing poverty
Promoting social equality	5) Reducing the income and wealth spread
Promoting social integration and avoiding social exclusion	3) Inclusion in the labour market
Promoting social stability	4a) Social security by the welfare state
Promoting autonomy	2) Education and training

That there are trade-offs, does not mean that it would be impossible to achieve the goals simultaneously. E. g. the amount of consumption is constantly creating a similar amount of garbage, but one can also develop strategies to reduce or avoid the environmental burdens or to work on it with the help of technology.

Prosperity and growth as well as environmental sustainability

Goodin et al. notice themselves that "economic efficiency" is rather "morally agnostic" (ibid.: 15). In its footnote 5 (26) they refer to "material well-being" as the actual welfare goal. Accordingly, we would start from the goal of the material well-being which is shortly measured by the economists as the gross national product per capita. We want to add the goal of economic growth

because the tension just consists between quantitative growth on the one hand and environmental sustainability on the other hand.

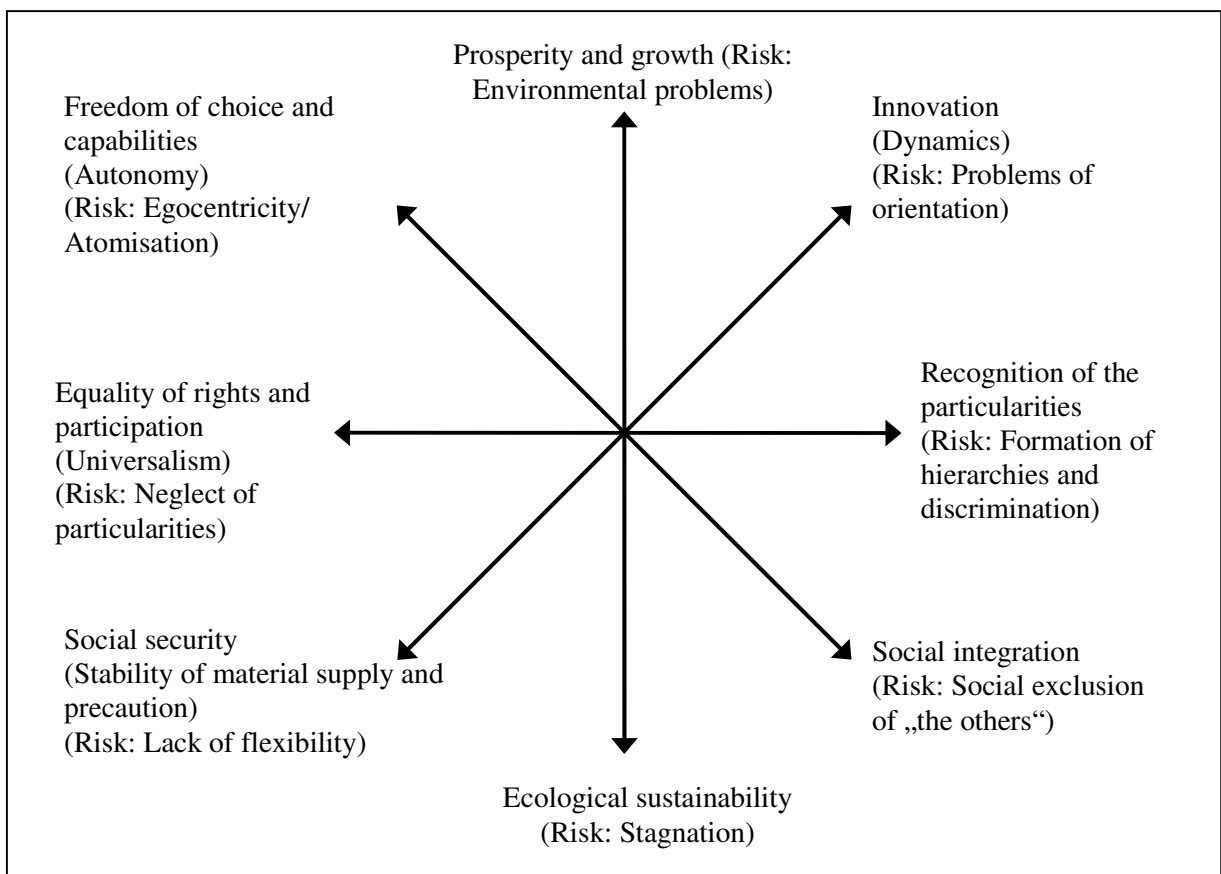
Innovation and social security (Stability of material supply and precaution)

Due to permanent new challenges, innovation is also an important criterion, since the relative wealth is based on the relative productivity compared to others. Therefore investments in research and development play a crucial role.

While the aspect of innovation is missing in the discussions of Goodin et al. and Merkel, they refer to the opposite pole, the social stability. The social security systems provide a stabilisation of income in case of illness, unemployment, old age, etc.

Figure 1-1: Socially desirable goals and criteria for welfare

(Projection of eight moral values in a two-dimensional representation)



Modell: Dieter Holtmann

Innovation and social security (Stability of material supply and precaution)

Due to permanent new challenges, innovation is also an important criterion, since the relative wealth is based on the relative productivity compared to others. Therefore investments in research and development play a crucial role.

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Recognition of particularities as well as equality of rights and participation

Goodin et al. and also Merkel formulate the avoidance or reduction of poverty as an independent goal, which is on the other hand implicitly included in the goal of equality. Poverty is understood as relative poverty, namely relative to the average citizen.

The antithesis to universalism of equal rights and participation is the recognition of the particularities, which is why a simple equality of treatment between groups with different preconditions is not appropriate. The recognition of the particularities is not addressed by these authors, but plays an important role in the current discussions about the recognition of different cultures, orientations and lifestyles.

Social integration as well as freedom of choice and capabilities (autonomy)

Goodin et al. define the boundaries of the kinship as those for which one has to take care of. The concept of support networks seems suitable because it resumes family, friends, neighbours, etc.

Merkel considers the inclusion with respect to the labour market as an important means of social integration. Unemployment on the other hand affects self-esteem and the ability to act.

To the permanent integration into family networks one could view autonomy as an opposite pole. Freedom of choice can be better realised if one had the appropriate capabilities (Sen 1993) that would enable citizens to actually seize the opportunities of formal freedom of choice.

Investments in human capital are central, since they enable individuals to better understand and deal with problems. This capacity to act has a preventive effect on potential hazards.

I consider these eight goals all as remarkable. Given the multidimensional nature of the problems I would renounce a prioritisation between these goals, since decisions should be made in due consideration of the context.

In the following chapters, the performance of 43 countries and – in summary – the different welfare regimes with regard to these eight socially desirable goals or welfare criteria is examined empirically:

Welfare regimes

Social democratic: Sweden, Norway, Finland, Denmark

Conservative: Germany, Austria, Netherlands, Belgium, France, Luxembourg, Switzerland

Economically liberal: USA, Canada, Australia, New Zealand, UK, Ireland

Familistic: Greece, Italy, Spain, Portugal, Malta, Cyprus

Post-socialist: Russia; Bulgaria, Romania, Slovenia, Czech Republic, Slovakia, Hungary, Poland, Estonia, Latvia, Lithuania; Croatia, Serbia

Productivist: Japan, South Korea

Special cases:

Turkey: Turkey is of interest as a candidate of the EU, amongst others. Due to the lower socio-economic level of development, Turkey is examined as a special case.

South Africa: South Africa as a growing emerging nation now counts as a part of the extended "BRICS" group. The residual welfare regime necessitates informal networks for social security (informal security regime).

Brazil: Brazil has a residual welfare regime with a very large informal sector (hence informal security regime).

China: China has the extraordinary combination of an ideologically communist government and a dynamic capitalist development.

India: In India the social security systems contain many programs only partially implemented. There is a very large informal sector (hence informal security regime).

2. Different paths of modernisation (Political regimes, production regimes and welfare regimes)

2.1 Modernisation as a point of reference for the comparison of social structures

The functionalist interpretation of modernisation theory (Talcott Parsons and others) emphasised that for instance the education and training systems contribute to the integration of society and increase the efficiency and competitiveness and evaluates modernisation positively as progress.

The approach with the emphasis on the ambivalence of modernity (e.g. Zygmunt Bauman 1992) elaborates the ambivalence or even polyvalence of modernisation- process and assumes that "barbarism" is possible even in the modern age (see also Miller / Soeffner 1996).

Below, the term "modernisation" is meant without judgmental progress aspect: In the process of modernisation not only productive, but also the destructive forces can act "on a larger scale." Below I will formulate performance criteria generally more ambivalent: If one chooses e.g. growth as a progress indicator, one should look at the back side of environmental problems as a criterion too.

Stefan Hradil (1996) has proposed the concept of modernisation as a benchmark for the analysis of social structures. Hradil distinguishes as ideal types pre-modern agrarian society, the modern industrial society and the modern post-industrial (knowledge and service) society and formulates for each core statements about observations, which would be expected from the perspective of a general theory of modernisation that he confronts in his analysis with the actual empirical observations.

In my opinion it is a good approach, first to formulate the criteria according to which the probation – here of the modernisation theory – should be assessed. But I suggest to distinguish, building on Esping-Andersen's theory of the three worlds of welfare capitalism, different modernisation paths, and I want to complement the three development paths of Esping-Andersen by three further paths what I want to justify now.

2.2 Political regimes, production regimes and welfare regimes

Soskice has proposed to differentiate production regime, which should characterise the types of coordination of business (see e.g. B. Soskice 1999). The uncoordinated (in my formulation: economically liberal) market economies with the US as example contrasts with the coordinated, which Soskice subdivides into the nationally coordinated with negotiations between the tops of the employers' and workers' organisations with Sweden as an example and sectorally coordinated production regimes with Germany as an example, where the social partners negotiate at sector level. Another form of coordination can be

found in Japan, where a ministry is responsible for coordinating the basic technology policy of enterprise groups. I would differentiate, as a further production regime, the state socialist or state capitalist, in which the planned economy or market economy is organized by the ruling party. Kitschelt et al. (1999) already pointed out that typical production regimes correspond to specific party systems and certain types of class compromise.

Using the class alliances approach, which e. g. is used by Esping-Andersen, I would suggest for these three structurings the following causal order: The paths of development of class alliances structure the development of the production regimes, and the development of political regimes and production regimes in turn structure the development of welfare regimes (see Table 2.1). The table is structured by the two polarities of guiding principles in the two diagonals. Economic freedom of enterprise versus security through state supply and autonomously acting individuals versus social security by belonging to the family or clan.

Through a successful alliance with the middle classes the Social-Democracy won hegemonic influence in Sweden and reached, after the Second World War, the expansion of the universalistic welfare state with a high level of social security.

In the immigration culture of the United States there were so many cultural cleavages that the trade union movement was not as strong to avert the hegemony of the bourgeois parties. With the individualistic attitude that everyone has to take its own responsibility to use the development opportunities, and trusting in the efficiency of the market, the welfare was conceived as a residual: Only after a strict means test welfare benefits should be granted.

In the Federal Republic of Germany the Bismarckian social assurance system had laid the early foundation, that the social security systems preserve the status achieved in the employment system. After the Second World War the social market economy was expanded under Christian Democratic influence, which was complemented by social democratic influences. Since the employers' and workers' organisations were both strong, neither the employer nor the employee side could enforce a radical policy option, which is why more likely intermediate solutions prevail, in the occupational welfare regime e.g. an intermediate level of social protection.

In the Japanese case the bourgeois parties dominated and developed a national co-ordination of enterprise groups by a corresponding ministry. Since the companies took already care for the social security of their core workforce, the state welfare remained residual. The additional safeguards must therefore be shouldered by the families.

In Italy also clientelistic party networks are relevant, the coordination by the state was expanded after the Second World War. Again, the families are important as welfare providers.

Table 2.1 Political regimes, production regimes and welfare regimes

		←	→			
		<i>Universalist public welfare</i>		<i>Private welfare within the household or family budget</i>		
<i>Individualistic</i>	Hegemonic social democratic parties			Hegemonic bourgeois parties	<i>Individualistic</i>	
	National coordinated production regimes			Uncoordinated (economically liberal) market economies		
	Individualistic-egalitarian welfare regimes (Ex.: Sweden)			Low labour protection, but competitive tertiary education system (Ex.: USA)		
		Catholic, social democratic and economically liberal parties without hegemony		Hegemonic bourgeois-national parties		
		Sectorial coordinated production regimes		Coordination of groups of companies		
		Occupational status-conserving welfare regimes, average social security (Ex.: Germany)		Productivist welfare regimes with privatised welfare (private tertiary education system) (Ex.: Japan)		
		Hegemonic bourgeois parties; Clientelism (networks)		Patriarchal or authoritarian regimes		
		National coordination level, but weak administration		National coordination level		
		Status-conserving residual welfare regimes (Ex.: Italy)		Patriarchal welfare regimes (Ex.: Turkey)		
<i>Collectivistic</i>	Hegemonic communist parties / hegemonic state			From authoritarian regimes up to a lack of state monopoly of force	<i>Collectivistic</i>	
	National coordinated production regimes			From steering the economy by dominant clans up to a lack of coordination (tribalism)		
	Collective-egalitarian welfare regimes (Ex.: state socialism in Russia before 1991) (Ex.: state capitalism in Belarus)			From clan power over informal security regimes up to insecurity regimes		
		←	→			
		<i>Universalist public welfare</i>		<i>Private welfare within the household or family budget</i>		

In the countries where communist parties won hegemony (as in Russia, China, etc.), planned economies have been developed, in which the party leaderships put through egalitarian schemes. Meanwhile, different variants of a state-dominated capitalism have been developed in Russia and China.

Finally, theocratic regime (such as Saudi Arabia), where church and state are not segregated, make the antithesis of a model of autonomously acting individuals (such as in Sweden). Turkey is a society that is developing in the field of tension between modernisation, division of powers, separation of church and state etc. and theocratic tendencies.

Below, the Federal Republic of Germany is empirically compared only with developed societies and with the BRICS countries ².

2.3 Six ideal types of welfare regimes

As an extension of Esping-Andersen (1990) I distinguish six ideal types of welfare regimes. In addition to the social-democratic regime with prototype Sweden the economically liberal regime (Esping-Andersen: "liberal") with prototype United States and two variants of the (in the terminology of Esping-Andersen) "conservative" regime are differentiated: The continental occupational regime retains the status of employment in the social insurances, e.g. is status-conserving, prototypes are the Federal Republic of Germany or Austria. In the familistic regime of Southern Europe, in addition to the status-preserving aspects the family plays an even more important role as a safety net in view of the residual state safeguards (see Ferrera 1996, 2005).

I want to extend the term "conservative" beyond the aspect of "status-preserving" (Esping-Andersen), what in my opinion also solves some classification problems. Esping-Andersen argues with three "stratification dimensions": conservatism, liberalism, socialism. The Netherlands then have an affinity to "socialism" and Switzerland to "liberalism". On the other hand Esping-Andersen considers the triangle of welfare production through state, market and family. If one acknowledges to the gender roles the importance they deserve, then the employment of women in the Netherlands, where the merchants invented the housewife model, has in fact risen, but to a large extent as part-time work, women still take over the major part of care work in families. In this sense, the Netherlands belong to the conservative welfare regime of Continental Europe. Accordingly, Switzerland, which introduced women's suffrage in Europe the last, with its division of labour between the sexes can be assessed as part of the conservative welfare regime of Continental Europe.

Esping-Andersen rightly claims to overcome a one-dimensional approach to welfare research, but not because of the concept of "decommodification", which

² The less developed countries could be differentiated according to Gough and Wood (2004) in "Informal security regimes" (safety on the basis of personal relationships) and "Insecurity regimes" (uncertainty dominates).

as measure of the generosity of the welfare state is an improvement over the share of the GDP for social spending (the latter also depends on the scale of the problems) which e.g. could be observed after German reunification, but is still one-dimensional. But with the triangle of welfare production through state, market and family as well as with the three stratification dimensions Esping-Andersen has introduced a fruitful multidimensional concept, which is expandable. To emphasize the explanatory power of the approach, I would increasingly use the concept of the welfare logics of the regimes. As to the regimes, it is by now appropriate in view of the further development of the discussion to distinguish (at least) six welfare regimes.

While work in the social democratic regime shall be organised in solidarity and greater equality shall be pursued through government redistribution, the prior goal of the economically liberal model consists in efficiency, which shall be achieved through market competition. The conservative occupational regime with its social market economy ranks on these dimensions in between. The coordination of the economy is left to the market in the economically liberal regime, while the state intervenes more strongly by regulation in the familistic regime and coordinates as a mediator between the corporations in the social democratic regime. The occupational regime with its right to free collective bargaining ranks in between. As can be seen at the system of taxation, in Sweden the individual stands at the centre, in contrast to the South where the family comes first. While the economically liberal model is individualistic too, in the social democratic model the individuals are further supported by a social safety net. In the conservative occupational model the wages are stratified by professional and by marital status, which is similar to the southern regime type.

The model for gender roles in the more traditional parts of Southern Europe are complementary role constructions. As partial modernisation of the male-breadwinner model one can interpret the dissemination of part-time employment of women, which is even more common in the Netherlands than in Germany. In the economically liberal regime the guiding principle of "gender neutrality" dominates, the state shall not intervene in the privacy, while in the social democratic regime the state promotes the "dual-earner model" e.g. by individual taxation. As dominant values concerning social security, one finds care by family, church and the residual state in the more traditional parts of the familistic countries in Southern Europe. In the conservative occupational regime these values are complemented by charities, whereat the families are first responsible according to the subsidiarity principle. In the economically liberal regime one relies first on voluntary assistance, and a residual relied from the state is granted only after a needs- and means-test. In the social democratic regime, however, the responsibility for social security is assigned to the state. Accordingly, the central welfare institutions are the family in the more

traditional parts of the South, social assurances in the conservative occupational regime, the market in the economically liberal regime and the welfare state in the social democratic regime.

Esping-Andersen (1990, p.70) measures "conservatism" as a dimension of stratification among others through the occupational particularism as it is reflected in the number of pension schemes ("corporatism"). The conservative and the familistic countries have the strongest degree of particularism, the highest number of pension schemes is found in Italy (12), followed by France (10), Austria and Japan (both 7) and Germany (6). In social democratic Sweden there is a distinction between the private and the public sector (hence there are 2 schemes), but also the economically liberal countries Australia, New Zealand and Ireland belong to the universalist pole, there is even only one pension system. However, in the economically liberal countries the general level of social security is on average significantly lower than in the social democratic countries.

In the more traditional parts of the South, funding of social security is provided partly by contributions and partly by the family. The conservative occupational regime is funded by contributions from employers and employees. The economically liberal residual regime is partly privately funded, and partly by state. In the social democratic regime the welfare state is responsible for funding of social securities, which is realized on the basis of a high taxation of the citizens.

Esping-Andersen (1990: 70) measures (economic) "liberalism" as dimension of stratification among others by the private share of total health expenditures. With 57 %, the economically liberal USA has the highest share of private financing. At the other pole, social democratic Norway exhibits only a share of 1 % private funding. In the familistic countries health care is predominantly funded by the state, accordingly we find in Italy a private share in funding of only 12 %. The conservative countries range in the middle, Germany e. g. has a private share in funding of 20 % (according to the measurement of Esping-Andersen 1990).

Citizenship is the basis of the right to social security in the social democratic welfare regime; this also applies to the economically liberal regime, however at a significantly lower level of social security. In the conservative regime, the level of social security is stratified by employment status. In the more traditional parts of the South, the family adopts the role of safety provider. Criteria for security claims are citizenship (legal resident) in the social democratic regime and contributions in the conservative regime. In the familistic regime, need is the criterion for security entitlement, in the economically liberal regime, at first it is checked whether the needy has no own resources (means-tested). The extent of social security is encompassing in the social democratic welfare regime, whereas it is only residual in the economically liberal and in the familistic regimes.

"Socialism" as a dimension of stratification is measured by Esping-Andersen (1990, p.70) among others through the equality of benefits, indicated by the ratio of the basic benefit to the maximum possible. In this sense universalistic are the social democratic countries (Denmark 99 %, Sweden 82 %), but also the two liberal countries Australia and New Zealand (100 %). However, in Sweden and Denmark ca. 90 % of the population have access to the security system, while this is the case for only about 33 % of the population in Australia and New Zealand. The level of social security in the conservative regime ranges between the social democratic and the economically liberal. While in the social democratic welfare regime, the social security benefits are provided especially in the form of social services, the benefits in the conservative regime consist mainly in financial transfers. In the economically liberal model, there are e. g. soup kitchens as a service from the charities and only residual financial benefits by the state.

If in addition to the after-care benefits one takes into account the preventive educational institutions, so there is also the question of the key differences in the logics of the education systems. An important characteristic of the conservative welfare regime is the early selection (generally at the age of 10-12 years) in pathways with varying educational perspectives. Both the social democratic and the economically liberal welfare regime focus, in a more universalistic way, on late differentiation, which according to the results of the PISA studies results on average in significantly better performances. On the other hand in the economically liberal countries, educational opportunities are structured by the high private investments in education. In the social democratic welfare regime, this plays only a minor role, so that by these two criteria taken altogether, universalism on the educational dimension is most pronounced in the social democratic countries.

In the familistic welfare regime, social assistance is provided rather in the form of personal services. Ferrera (1996, 2005) points out that in the South, on the one hand the social insurances stand in the Bismarck tradition – that is why Esping-Andersen assigns them to the conservative type – ,but on the other hand, health care is provided by the state and thus more in line with the Beveridge tradition. According to Ferrera (2005), the role of government is generally rather weak in the South, because the family has important functions, because of the large informal economy and because of the weak administrations. Because rational administration is weakly developed, clientelism (services in exchange for party support) and patronage (preferential treatment, corruption) play a greater role in Southern Europe.

The "post-socialist countries" in Central and Eastern Europe have in common the state socialist past, insofar they are treated in the following provisionally as the fifth group of countries, however, these countries are in a process of

differentiation into various subgroups. The Eastern European candidate countries for the EU have already removed from the state socialist welfare regime. But there are also countries like Belarus, which have maintained the authoritarian regulation by the state, even though they have adopted the right to private ownership of means of production. Therefore Korosteleva (2007) characterised Belarus as state capitalist. China is another interesting hybrid form, where a Communist Party still regulates in a political authoritarian way, but at the same time has initiated a strong economic dynamism by means of the market mechanism and promoted by many domestic entrepreneurs, which King / Szelényi (2005) characterise as "capitalism from below". In contrast, King / Szelényi see e. g. in the case of Russia a "capitalism from above" with few domestic entrepreneurs and lower dynamics. The Eastern European EU accession countries are characterised by King / Szelényi as liberal systems, in which foreign capital plays a greater role than the domestic capital and where there is some economic dynamism. The performance of these countries beyond mere economic growth will also be studied in detail below.

As sixth ideal type we distinguish the "Asian capitalism", which is characterised by Amable (2003) in particular by the predominantly private tertiary education system, while in the liberal Anglo-Saxon type the tertiary education system has high enrolment rates and is competitive. Hence, Lane (2007) characterises this type as "privatised welfare". In the context of comparative welfare research, the term "productivist" seems to me best suited to characterise this welfare logic, in which success on the world markets is aimed at through conscious technology development to promote economic rise. Concerning the "productivist" welfare regime, in the following the institutions and the performance of Japan and South Korea are analysed.

2.4 The countries or groups of countries considered

In the following models of good life are discussed in the way that the selected countries will be examined to determine, to what extent they meet socially desirable goals. These goals have been worked out as performance criteria in advance, through a discussion of moral philosophy. Germany is member of the EU, which is why all countries of the EU and prospective candidates are considered. Furthermore, in comparative welfare research the Anglo-Saxon countries (beyond Great Britain and Ireland) and the East Asian countries Japan and South Korea play a role as specific welfare models.

Table 2-2: The 43 countries considered

Country	Australia	Austria	Belgium	Brazil	Bulgaria	Canada	China
Country code	AUS	AUT	BEL	BRA	BUL	CAN	CHN
Country	Croatia	Cyprus	Czech Republic	Denmark	Estonia	Finland	France
Country code	CRO	CYP	CZ	DK	EST	FIN	FR
Country	Germany	Greece	Hungary	India	Ireland	Italy	Japan
Country code	GER	GRI	HUN	IND	IRL	ITA	JP
Country	Latvia	Lithuania	Luxembourg	Malta	Netherlands	New Zealand	Norway
Country code	LAT	LIT	LUX	MLT	NL	NZL	NOR
Country	Poland	Portugal	Romania	Russia	Serbia	Slovakia	Slovenia
Country code	POL	POR	ROM	RUS	SRB	SLK	SLV
Country	South Africa	South Korea	Spain	Sweden	Switzerland	Turkey	United Kingdom
Country code	RSA	KOR	SPA	SWE	SWI	TUR	UK
Country	United States						
Country code	USA						

As economically important nations, all BRICS countries are taken into account, though they still have so many development problems, that they are not strictly comparable with the more developed countries.

In the following, 43 countries are taken into account, which play a special role in the investigation of the social structure of the Federal Republic in international comparison and in comparative welfare research as well as in the political context of the EU and its enlargement. In Table 2-2, the selected 43 countries are listed each with its country name and with a national, well recognisable code for the following pictures.

Through region, language and culture, discourse relationships and learning processes arise, which Castles has called "families of nations". Esping-Andersen (1990) distinguishes different welfare logics, the development of which could be partially explained with the concept of "families of nations". The fertility of the idea of the distinction between different welfare logics can also be seen in the

fact that the various educational systems could be similarly classified in corresponding educational regimes. According to the different logics of welfare production, most countries can be relatively clearly assigned to one of the different welfare regimes:

Social democratic: Sweden, Norway, Finland, Denmark

Conservative: Germany, Austria, Netherlands, Belgium, France, Luxembourg, Switzerland

The *Netherlands* are classified by Esping-Andersen (1990) as "social democratic", but the cluster analysis of Esping-Andersen's data by Obinger / Wagschal (1998) places the Netherlands in immediate proximity to Germany. The analysis of Ostner (1995) and our own analysis suggest an allocation of the Netherlands to the conservative welfare logic: If in the triangle of welfare production - state / market / family – one takes greater account of the family, one remarks for example, that women in the Netherlands work mainly in part-time and, therefore, women have a relatively small share in the volume of paid employment, i.e. women reversely are more involved in the production of welfare in the family context.

Switzerland exhibits in particular conservative elements, which can be seen e.g. in the gender roles, on the other hand by its function in the international financial system also liberal and finally some social democratic elements, because in the political model of consociational democracy the major parties are all involved in the government. However, according to our analyses of the institutions, by now the conservative welfare logic dominates on the whole.

Also in *Luxembourg* in addition to the status-conserving elements, one finds some liberal elements because of its function as an important investment place in the international financial system. But according to our analyses of the institutions, the conservative welfare logic dominates by far.

Economically liberal: USA, Canada, Australia, New Zealand, UK, Ireland

Ireland has the additional characteristic of being influenced by the Catholic church. With regard to gender roles, Ireland is therefore more conservative than the other liberal countries. However, the economically liberal welfare logic dominates.

Familistic: Greece, Italy Spain, Portugal, Malta, Cyprus

Post socialist: Russia; Bulgaria, Romania, Slovenia, Czech Republic, Slovakia, Hungary, Poland, Estonia, Latvia, Lithuania; Croatia, Serbia

In this preliminary grouping due to the common state socialist past, Russia tends to be a border case, because in some developments (for example in the poverty rate) Russia falls behind the other Eastern European countries.

Productivist: Japan, South Korea

Japan: Japan is a mixed-type having both conservative and economically liberal characteristics. Amable (2003) characterises this as "Asian capitalism", where the welfare is in so far privatised, that the tertiary education system is financed privately in comparatively high degree. The welfare logic can be characterised as "productivist", because the economic rise shall be achieved through conscious technology promotion with successes on the world market.

Special cases:

Turkey: Turkey is i. a. as a candidate of the EU of particular interest. Due to the lower socio-economic development level, Turkey is examined as a special case.

South Africa: As a growing emerging market, South Africa is by now counted to the enlarged "BRICS" group. The residual welfare regime makes informal networks for social security necessary ("informal security regime").

Brazil: Brazil has a residual welfare regime with a very large informal sector (hence also: "informal security regime").

China: China exhibits the unusual combination of an ideologically communist government and a dynamic capitalist development.

India: In India, in the social security systems so far much is only programme, with a lack of implementation. There is a very large informal sector (hence also: "informal security regime").

2.5 Different paths of modernisation

According to my analyses, it is advisable not to claim a single path of modernisation towards growth, participation and inclusion. The different logics of welfare production, in which the fundamental values of the various societies are reflected and which lead to differing institutional development paths of societies, are probably the most fruitful approach to distinguish different social "worlds". Besides the three "worlds" of Esping-Andersen – as ideal types: the social democratic, the economically liberal and the conservative welfare regime – one should, as established in Section 2.3, distinguish the "familistic" welfare regime of Southern Europe and – because of the common state socialist past – the group of post socialist countries, which are however in a process of differentiation. Furthermore, the productivist welfare regime of East Asia is considered, which strives for economic advancement through export successes on the world market.

It will now be shown, in particular in terms of income inequality and poverty, that the basic logics of these six welfare regimes differ significantly.

- *Social democratic*: In the Scandinavian welfare states the norm of equal social rights dominates. Therefore, the social security systems are formed in a universalistic way, the systems are not stratified by the status in the employment system. Persons are taxed as individuals, the encompassing benefits can only be financed in nearly full employment – of men and women. The income inequality and the poverty rates are kept low, since by activating educational and labour market policies provision is made preventively to combat poverty and through fiscal redistribution gross income inequality is reduced.
- *Economically liberal*: In the economically liberal states greater emphasis is laid on the market mechanism and on a general competitive orientation. The relatively dynamic development of business and employment opportunities are the basis of the comparatively high prosperity of the liberal regime. Because equality is interpreted in the dominant guiding principle as equal opportunities, the individual is primarily responsible for his social security and welfare support will be only provided after a strict means test. Therefore, in this development path one can find rather great income inequality and high poverty rates.
- *Status-conserving*: In the status-conserving or conservative welfare states, subtle differences in social security are made, but at a medium security level. Therefore, both the income inequality and the poverty rates tend to be in the middle range. The formation of this welfare regime is based on the core values of social security – the protection against risks –, on the stability of life courses and the integration into the community, often realized in clubs and in the associations of civil society.
- *Familistic*: The less prosperous countries of Southern Europe are on the one hand rather status-conserving, but on the other hand, they use less wealth for social security. Instead, they complement the familiar responsibility for care only by a residual welfare state. Inequality and poverty rates tend rather towards the high levels of the economically liberal countries. If as guiding concept, the family is conceived as the primary producer of welfare and gives the responsibility for reproductive and care work to the family, there should be also strong financial support for the family, but this is hardly the case in the residual welfare state. As a result, in the familistic welfare regime, the birth rates are the lowest.
- *Post socialist*: The post socialist countries run rather fast through the current modernisation processes. Starting from an egalitarian tradition, social inequalities have widened in the transformation processes.

According to my observations, the group of post-socialist countries forms no uniform welfare system, but rather the post-socialist countries with

their common egalitarian past differentiate into diverging paths with regard to inequality. From the post socialist countries, e.g. Slovenia and the Czech Republic exhibit a low level of inequality. In Poland one finds an average level of inequality. By now, Russia has a high level of inequality, similar to the USA.

The EU enlargement should help to support the catch-up process in welfare levels in the accession countries.

- *Productivist*: Japan has developed the model of an economically strong rise compared to many other countries, by successes on the world market through a systematic promotion of research and development. This model is now successfully performed by South Korea, too.

3. Societies' capacity for innovation in an empirical comparison

Capacity for innovation as a socially desirable goal

Innovations describe new developments, inventions or ideas, which help to improve the quality of life. From the perspective of macroeconomics innovation systems are important to produce new knowledge and technologies that can be utilized to stimulate economic growth. Innovation thus is the foundation for future prosperity.

Innovations provide an opportunity to undertake particularly qualified productions and services in the world division of labour and thereby gain competitive advantage. A high standard of living is in general based on an advantageous position in the world division of labour, which can only be secured over time, if accompanied by a high level of educational and professional qualifications and a high degree of innovation in the products.

Selection of indicators

The expenditures for research and development are the most important input for the innovative capacity of a country. High expenditures on research and development indicate a high level of research with the latest technological equipment. This creates favourable conditions for new insights and innovative results. In 2012 in the EU28 55 % of the expenditures on research and development were financed by business enterprises and 33% by the government (10% were financed from abroad). Therefore, in the following the private expenditures (in detail: the expenditure of business enterprises) and public spending (in detail: government expenditures) for research and development are used as indicators for the input of innovation.

The spread of modern information and communication technology within the population, here specifically the internet users per 100 inhabitants, is considered as a further performance criterion for innovation systems. The utilisation rates show the extent to which a population is capable to participate in technological innovations. The internet as a "data highway" is something like an intervening variable in the innovation process. On the one hand, the spread of the internet is already a result of investments in research and development, on the other hand, the internet favours the dissemination of innovation processes.

Patents are a measurable result of the effectiveness of an innovation system, since they protect in particular the economical exploitation of the new findings. To include only the economically most important patents, we use the triadic patents as indicator. Triadic patents only consider inventions that are simultaneously protected at the three main patent offices – the European Patent Office for Europe, the Japanese Patent Office in Japan and the United States Patent and Trademark Office in the United States. Thus, only the patents that represent a particularly high economic value are counted.

To obtain a summary index for innovation, on the one hand, both standardised expenditures indicators are combined into one sub-index for the input. On the other hand, the standardised indicators of usage of the internet and the patents are combined into one sub-index for the output. On the basis of the two standardised partial indices the total index for the innovative ability is formed, which gives the same weight to the input and the output.

The capacity for innovation across countries

Concerning public investment (government financed) in research and development as a percentage of GDP, the social-democratic countries Sweden, Denmark and Finland (places 3-5) are part of the top performers. The conservative countries Austria with the first place and Germany with the sixth place as well as South Korea with the second place complete the top group. As part of the GDP the post-socialist countries Bulgaria, Romania and Turkey invest least in research and development.

As for private investments in research and development (business enterprise expenditures) the "productivist" countries South Korea and Japan are at the top, in doing so the large companies are coordinated by the state. The ideas about the responsibility of private enterprises and government vary between national cultures. Japan ranges on the second place in private investments, but ranks on the 20th place in public investments. The social democratic countries Finland, Sweden and Denmark are also at the forefront. The conservative countries Switzerland and Austria complete the top group. Germany reaches the 10th place. The post-socialist countries Latvia and Romania as well as India and Cyprus range at the very end.

Concerning the internet users per 100 inhabitants, the social democratic countries Norway, Denmark, Sweden and Finland are at the forefront. The conservative countries Luxembourg and the Netherlands complete the top group. Germany (with 86 users per 100) reaches the 12th rank. The usage of the internet is the least common in the post-socialist countries Bulgaria, Romania and Serbia as well as in Turkey, China, South Africa and finally India, where only 18 out of 100 inhabitants use the internet.

Considering the economic exploitation of innovations through patents in recent decades Japan performed best, which owes its rise after the Second World War in particular to the focus on the development of technology and export efficiency on the world market, with a separate ministry responsible for the coordination of the innovation politics of the large enterprises. Japan has declined somewhat in recent years, so that now Switzerland is at the top. Germany has improved slightly and is now in the top group along with Austria as well as Sweden and Denmark and also South Korea. These are also the countries which invest relatively most in research and development. Concerning the important patents (per million inhabitants), Brazil and India are still at the very end.

Concerning the input index of innovation (with the same weight of the standardised values of the public and the private spending on research and development) the productivist countries Korea and Japan are at the top, in which the business enterprises engage strongly in research and development. Besides the social democratic countries Sweden, Finland and Denmark the conservative countries Austria and Germany complete the top group. The post-socialist countries Latvia and Romania as well as Cyprus rank at the very end.

Considering the output index of innovation (with the same weight of the standardised values for internet usage and important patents) Switzerland and Japan are at the top because of their successful patent policy. The social democratic countries Denmark and Sweden score well, too. Germany, on the 6th place, also belongs to the top group. India ranges by far at the very end.

If we combine the standardised sub-indices of the two input and the two output indicators of equal weight into a summary index, the productivist countries Korea and Japan as well as the social democratic countries Sweden, Denmark and Finland as well as the conservative countries Switzerland, Austria and Germany reach the highest values. Germany also scores well with the 8th place. The capacity for innovation is least developed in the post-socialist countries Romania, Bulgaria and Serbia as well as in the emerging markets of South Africa and India in particular.

The development of public investments in research and development

According to the Innovation Union Scoreboard 2015 of the European Commission, the public expenditures on research and development as a percentage of GDP in the EU28 have increased by an average of 1,9 percent from 2006 to 2013, despite the financial crisis. From the leaders Denmark and South Korea have the strongest growth with an average of 5 percent each, but these investments have also increased with an average of 3,5 percent disproportionately high in Germany.

In the final group (Romania, Bulgaria and Turkey) the growth in Bulgaria was negative with an average of -4,3 percent, these public investments for research and development have been reduced in the financial crisis.

Looking at the development in each year more precisely, the data for the OECD show that the proportion of public expenditures on research and development decreases after 2009, however, as in the EU28, in 2013 it lies a little above the level of 2007. The growth of public investments in research and development has therefore been affected by the financial crisis.

The development of private investments in research and development

Private expenditures on research and development as a portion of the GDP rose in the EU28 from 2006 to 2013 on average by 1,9 percent according to the Innovation Scoreboard 2015. In the top group (South Korea, Japan, Finland and Sweden) these investments have risen on average by 15 percent in South Korea from 2006 to 2013 according to the OECD, which is exceptionally strong. The increase in Germany was slightly above the EU28 average score (1,9) with an average of 2,1 percent.

In the final group (Latvia, India, Romania and Cyprus) those investments have been reduced in Cyprus by an average of 3,5 percent, in Romania by an average of 5,6 percent and in Latvia by an average of 9,0 percent from 2006 to 2013. Latvia also had the biggest economic slump after the financial crisis.

Looking at the development in each year more precisely, the data for the OECD show that private investments in research and development have fallen from 2008 to 2009 and from 2009 to 2010. Until 2013, however, these investments have increased above the level of 2006 as in the EU28. Private investments in research and development have been quite impaired due to the financial crisis.

The development of the number of internet users

The number of internet users (per 100 inhabitants) has grown from year to year in the period from 2005 to 2014 according to the World Bank.

In the leading group (Norway, Denmark, Luxembourg, the Netherlands, Sweden and Finland) the increases diminish in this period, starting from 95% of users the

saturation point seems gradually to be approached. In Germany with 86% of internet users there is still room for improvement.

In the final group Turkey improved from 16% to 51% in the period from 2005 to 2014, China from 9% to 49%, South Africa from 8% to 49% and finally India from 2% to 18%. This means that the differences in the average level of technological development are still enormous. In the development of internet use there does not seem to be such a striking effect of the financial crisis. The technological modernisation process is relatively uniform, but on different levels.

The development of the number of important patents

Looking at the period from 2006 to 2013, Switzerland has overtaken Japan at the top (see OECD). By now Germany displaced Sweden on the third place. Denmark improved to the fifth place. South Korea's development was the most dynamic. Concerning the *triadic* patents Korea has now reached the sixth place, concerning *all* patents South Korea would be ahead of Japan at the top.

The final group (India, Brazil, Romania, Turkey and Greece) has a large backlog and develops only slowly.

Altogether in the development of important patents there is no great effect of the financial crisis.

The development of innovative capacity in total

The public investments in research and development as a share of GDP have declined after 2009 according to the OECD, in 2013 however, the investments in the OECD and also in the EU28 are above the level of 2006. The growth of public investments in research and development has suffered a setback because of the financial crisis.

The private expenditures on research and development as a share of GDP have declined a little from 2008 to 2009 and from 2009 to 2010 according to the OECD. Although private investments in research and development have increased until 2013 again somewhat above the level of 2008, growth was adversely affected by the financial crisis.

The impact of the financial crisis on the number of internet users is relatively low. The development is more like a general technological modernisation, although some countries - such as India - develop rather slowly on average.

In the development of important patents, the effects of the financial crisis are rather small. The technology policy of South Korea and Japan lead to a high competitiveness of the productivist welfare regime.

In Germany public expenditures on research and development as a share of GDP rose on average by 3,5 percent from 2006 to 2013, which is more than in the EU28 (1,9%). The growth in private investments for research and development was on average 2,1 percent from 2006 to 2013, which is slightly above the EU28- average of 1,9%. Concerning the number of internet users (per 100 inhabitants), Germany reached 86%, so that there is still room for improvement to Norway and Denmark, which are about 95%. In the number of important patents in relation to the population, Germany has now reached the third place behind Switzerland and Japan. With its innovative capacity Germany achieved the best place of all performance criteria, namely place 8.

4. The global financial crisis and the Euro crisis as current challenges

From the regular economic crises two are outstanding: the world economic crisis starting in 1929 and the global financial crisis starting in 2008. In December 1930 Keynes proposed that the state closes the demand gap by making meaningful investments in the future as a response to the economic crisis, which was a result of an exaggerated monetary expansion in the USA, reflected in a stock boom and bust. However, the governments all responded with protectionism.

The question arises what the causes of the current crisis might be, which by its magnitude is the second global financial crisis. The US-American Law on the Regulation of Banks (Glass-Steagall Act), which was introduced in 1933 in response to the world financial and world economic crisis (1929-1933), was abolished under the Clinton administration under the pressure of the banks. After the bursting of the Dotcom bubble in March 2000 the US Federal Reserve favoured with the policy of low-interest rates the subsequent real estate bubble. The US Federal Reserve counted the stimulation of the economy to its tasks, but not yet the containment of “asset inflation”. Through the securitisation of mixtures of mortgage loans the risks were distributed by the American banks to the entire world. After the political mistake of not protecting the investment bank Lehman Brothers from insolvency in September 2008, the panic-like chain reaction in the global financial system began. The second global economic crisis did not emerge because the governments saved the banks and coordinated with Keynesian economic stimulus packages. Without further regulation, however, the large volume of rent-seeking capital still carries risks.

Systematically, one can distinguish as main causes of the global financial crisis:

1. *Politics:*

- a) Household debt in the USA: American policy has promoted the purchase of property on credit – under the framework of extremely low interest rates –, which initially generated a housing price boom, which then led to the crash of the housing prices when the speculative bubble burst, and to overindebtedness of households and to the collapse of consumption.
- b) Government debt of the USA: US military intervention also has the economic aspect that the US governments are indebted to the rest of the world.
- c) The unequal distribution of wealth leads to a large volume of rent-seeking capital.

2. *Economy:*

Through financial innovations, the rest of the world was involved in the risks and ultimately the financing of American lending, with the intransparent financial products sold with a bonus system. (A real estate crisis was not only to be found in the USA, but there was, e. g. also a real estate boom and bust in Spain.)

What is to be done?

Joseph E. Stiglitz suggests – in addition to “Keynesian” economic stimulus packages – to focus on regulation, because of the policy and market failures: „The design of regulatory structures and systems has to take into account

- a) asymmetries of information – the regulator often is at an informational disadvantage relative to the regulated;
- b) moral hazard – there are often problems in ensuring that the regulator’s behavior is consistent with social welfare, e.g. that he is not captured by those whom he is supposed to be regulating; and
- c) human fallibility – mistakes are inevitable, and one needs to minimize the costs of such mistakes. Well-designed regulations take into account the limitations of implementation and enforcement. While no regulatory system is perfect, economies with well-designed regulations can perform far better than those with inadequate regulation. Regulations can both enhance markets and protect those who might otherwise suffer in unregulated markets.” (Joseph E. Stiglitz, April 2009)

After all, the American government and the European, Chinese, etc. governments coped much better with this global financial crisis than with the first.

From the global financial crisis to the great recession and to the state debt crises

The bursting of the real estate price bubble in the USA led to a global credit and banking crisis due to the global trading of credit securitisations. The USA, Great Britain, Iceland and Ireland were the most heavily involved and were particularly affected by the banking crisis (see also Farnsworth/Irving 2012).

The major recession following the credit crisis led to a sharp decline in exports in Germany, China, Finland and Sweden (see also Farnsworth/Irving 2012). Germany and China, however, balanced this out by stimulating the internal market. Sweden and Finland had already learned during the previous Scandinavian financial crisis how to handle such a situation.

Because of the necessary bank rescues (“too big to fail”) due to the global financial crisis and the necessary economic stimulus programmes due to the big recession, many nations have been hit by government debts. Due to the large banking crises, Ireland, Iceland and finally Spain were especially concerned. Because of the low competitiveness in the big recession, particularly Greece and Portugal were strongly hit as well. The debt of Greece was the starting for the next Euro crisis, which revealed some weaknesses in the construction of the Euro-zone.

The Euro crisis

The bank rescues and the economic stimulus programmes have led to an increase in the government debts, which acted as a stress test for the European monetary union, which had not yet been fully secured in the institutions. In a monetary union of heterogeneous economies, political and economic institutions are needed to deal with various “shocks”.

Eichengreen (2010) compares the Euro crisis after realising the real extent of the Greek government debt with the crisis of confidence following the fall of the Lehman Brothers in the USA in the autumn of 2008.

When dealing with the Euro crisis, the connections between the banking, sovereign debt and growth crisis must always be taken into consideration (see Jay C. Shambough, “The Euro's Three Crises”), that is why the solution is so lengthy. Shambough discusses the interweaving of (1) banking crisis that led to the (2) sovereign debt crisis, which in turn led to a (3) growth crisis. As in a “vicious circle” (spiraling downwards) the falling prices of the assets again weaken the bank balances, etc. Conversely, the economic crisis weakened the indebted states, the weakening of the states leads to a depreciation of the assets of the banks in the form of government bonds, the weakened banks will limit the

lending of credits and thereby undermine the growth. Because of this interdependence of the problems, measures, which improve a problematic situation, but at the same time worsen another problem situation, are suboptimal. Shambough therefore recommends an integrated package of measures, which is sketched as follows:

Governments in deficit countries should reduce taxes on labour (instead of wage reductions) and increase consumption. At the same time, surplus countries like Germany should strengthen consumption in order to promote growth.

The ECB should also reduce the long-term interest rates. A higher nominal GDP growth would facilitate the sustainability of the debts.

The ECB could strengthen its policies with the aim of lower long-term bond yields.

The banks could be recapitalised via EFSF funds to reduce the interdependence of the sovereign debt crisis and of the banking crisis.

Surplus countries such as Germany could fiscally expand, which, by stronger growth, would be beneficial for all.

This package would strengthen the growth of the Euro-zone through fiscal policies, bank recapitalisation and monetary policies. The previous limitation on the reduction of government expenditure in the crisis countries leads to sub-optimal results. Regulation and monitoring of the banks are needed across the Euro-zone. Furthermore, a common low-risk Euro-zone loan, in contrast to riskier bonds with higher yields, would reduce the interdependence of sovereign debt crisis and banking crisis. – A monetary union must be completed by a finance union (not a fiscal union), according to these arguments from Shambough (2012).

The big line for the EU as a political project would be a common “Marshall Plan” for the “crisis countries”, a European brainstorming of the most fruitful investments in these countries and the most favourable possibilities for implementation.

The increased public debt creates pressure, which in some societies is passed on to the social security systems. On the other hand, social security systems are automatic stabilisers in the economic crises. There are also other good reasons to develop systems for the promotion and maintenance of “human capital”.

The effects of the financial crisis can be well investigated in terms of the performance with regard to the socially desirable goals, which we consider: prosperity; environmental sustainability; innovation; social protection by social spending in the case of risk events as well as precautionary by means of

investments in education; recognition of peculiarities (friendliness towards women and friendliness towards migrants); equality of participation; social integration; autonomy (freedom of choice and capabilities).

5. Education and social security as well as capability to autonomy

In the following we will discuss the extent to which the various states that emphasise, on the basis of the raised budget, more for the aftercare protection of the welfare state in case of the occurrence of risks, such as unemployment, or more strongly on prevention by investing in education and training (see chapter 5.1).

However, the investments in education are not only precautionary in order to better cope with occurring problems, but also the basis to make formal freedom of choice to factual freedom of choice by empowering the people to choose the way of life which to appreciate they have good reasons. In addition to the objective empowerment and capability of autonomy, which can be operationalised by education competencies and certificates, in the operationalisation of autonomy we also consider the population's subjective evaluation of the freedom to choose one's own way of life (see chapter 5.2)

5.1 Education and aftercare social security in the different countries and welfare regimes

Social Security: Prevention through education and safety net in case of risk as socially desirable goals

A key task of the welfare state is to safeguard the individual actors against risks as illness, unemployment, invalidity, etc. The welfare state provides in these cases at least a subsistence level, in the conservative logic also for the maintenance of living standards. Such failures arise, for instance, as a result of loss of income due to unemployment. Thus, the own life plans can be pursued continuously and are secured against important life risks. So as stability of the material supply we mean that a minimum supply by the state or other institutions will also be ensured when a person cannot take care of themselves from their own resources.

The desired goal to stabilise life plans against risk can be achieved in two different ways. The aftercare welfare state strives to compensate for the material loss if a particular risk, e.g. unemployment has already occurred. The preventive welfare state, however, intends not to let that happen; it tries to minimise the likelihood of the occurrence of risks by prophylactic measures such as education and training. According to the mission statement of the activating welfare state citizens should not only be the passive recipients of transfer payments, but should be enabled to acquire the skills, through which they can protect

themselves against risks. To succeed with such a strategy of “promoting and demanding” the state must, however, provide a supportive public infrastructure.

Selection of indicators

Both aspects of the welfare state – the material supply in case of need as well as the active prevention – shall be represented by appropriate indicators. The social spending of the welfare state as a percentage of GDP is thereby an indication of the size of income replacement rates after the occurrence of risk events. If one were to consider also the private spending for health, liberal countries would have high expenditures in the aggregate, but these are very unevenly distributed. This is less adequate for the partial explanation of income poverty. Public and private spending on education show how strongly the society invests in risk prevention. This indicator is adequate to partially explain educational poverty. A good example is South Korea which has set its focus clearly on education, but with a high private share.

Out of the two standardised indicators an average value is finally calculated which is in turn standardised, so the scales of the performance are comparable through the whole book. This is the overall index for social security.

Comparison between the countries

In social spending (as a share of GDP) the social democratic countries Finland, Denmark and Sweden as well as the conservative countries France, Belgium and Austria reach the top. Until 1990 social spending of West Germany ranged at an intermediate level among the countries, as a result of German unification the need for social expenditures has risen, so that Germany is now to be found on place 9. At the lower end of the ranking one finds the emerging markets Turkey, South Korea, South Africa and at the very end China and India whose social spending is still very rudimentary.

Concerning the precautionary public and private spending on education (as a share of GDP) at the top we find the social democratic countries Denmark, Sweden and Finland as well as Cyprus and Malta (which have specialised themselves as tax havens) and Great Britain. In these countries about 7 to 9 % of GDP are spent on education. In Germany this share is significantly lower with 5,5 % (rank 24 of 43). The end of the ranking is formed by China and India as well as Romania, which provide the least resources for the education of their population.

On the whole, social security is best developed in the social democratic countries Denmark, Finland and Sweden as well as in the conservative states Belgium and France according to the overall index. Germany is ranked on place 15 because it reaches place 9 in the aftercare of the welfare state, but only place

24 in terms of prevention through education. At the very end of the ranking we find Turkey and Romania as well as China and India.

On the development of social expenditures

In the economic crisis of 2009 the domestic product slumped in almost all countries. Unemployment has increased in 2009. Because of these two developments social spending increased as a share of GDP. According to Eurostat 2016, in the EU27 the share of social expenditures in GDP increased on average from 26,1 % in 2005 to 28,8 % in the crisis of 2009, and was reduced to 28,6 % in 2012. According to OECD 2016, in the OECD the share of social expenditures in GDP rose on average from 19,4 % in 2005 to 21,9 % in the crisis of 2009, and was reduced to 21,6 % in 2014.

In the crisis year 2009 the proportion of social expenditure in GDP (see Eurostat 2016) rose in the EU27 by 10,8 % compared to the previous year. Significantly disproportionately is the increase of unemployment and the necessary social spending in the economically liberal Baltic States: +39,2 % in Latvia, +32,1 % in Lithuania, 27,9 % in Estonia. In Ireland, which was strongly hit by the crisis, too, we find an increase of 18,9 %. By contrast, in Poland with its orientation on the domestic market, there is an increase of only 5,2 %.

The increase in social spending is due to rising unemployment and cannot be equated with an increasing generosity, this would require the replacement rates (or the extent of de-commodification). According to OECD data the share of social spending decreases with declining unemployment from 21,9 % of GDP in the crisis of 2009 to 21,6 % in 2014. The standards of the welfare states are still under pressure due to the general financial consolidation course after the global financial crisis.

On the development of educational spending

Since the GDP slumped during the crisis of 2009 in almost all countries, the proportion of (absolute relative stable) educational spending rises in 2009.

In the EU27 the proportion of educational spending increases from 5,4 % of the GDP in 2005 to 5,7 % in 2009. In absolute numbers, there tends to be a general slight increase in educational spending. The investment in education as well as in research and development are options to react to the economic crisis, in so far educational spending is under less pressure.

From 2008 to the year of crisis 2009 educational spending rose slightly at current prices in the EU27. In the EU27, expenditures on education as a share of GDP rose by 0,4 percentage. A positive example is Denmark whose expenditures on education increased despite the crisis both in absolute terms and by 0,8 percentage of GDP.

In the OECD-countries educational spending as a share of GDP increased from 2008 to the year of crisis 2009 on average from ca. 4,9 percentage to ca. 5,2

percentage, which is likely to be due to the fall in GDP, since absolute expenditures on education cannot be changed so quickly. From 2010 to 2012/2013 this share remained constant at about 5,2 percent according to OECD 2016.

On the development of educational and social spending altogether

On the whole, social spending rose in the crisis only due to the increasing unemployment, but afterwards was reduced again. The generosity of the welfare state (measured by the replacement rates) is still under pressure because of the widespread consolidation course.

Expenditures on education are generally increased rather steadily because investments in education as well as in research and development are meaningful answers to increase flexibility among the difficult conditions of the global financial crisis.

In Denmark the development of educational and social issues is particularly balanced. South Korea definitely focuses on an economic rise on the world market by investing in education as well as in research and development, which is already reflected by the success of South Korea on the global market. Germany has steadily increased its educational spending starting from too low a level, however, as share of GDP the educational spending is still below the EU27 average and also below the OECD average.

Educational and welfare regimes

If one compares the aftercare aspect of social spending and the aspect of prevention by investments in education, Germany belongs to the countries that are primarily focused on aftercare.

Denmark is the country that is the most balanced in belonging to the top both in preventive educational spending as well as in aftercare social spending, which is why it is also by far at the top in the overall index of social security. All social-democratic countries of Scandinavia are above the international average both in terms of prevention by education as well as in aftercare social spending.

The most striking profile with a clear focus on prevention by investing in education, research and development can be found in productivist South Korea, which on the other hand, ranges at the end concerning the aftercare social spending. The economically liberal countries USA and Canada are above the international average in the prevention by educational investments, but below average in the aftercare social spending.

The prototype of the onesided focus on the aftercare social spending is Italy which uses its resources particularly in the form of pensions. Also the familistic

countries Greece, Spain and Portugal are above the international average in aftercare social spending, but below the average in the prevention by educational investments.

The familistic countries Cyprus and Malta are special cases because these island nations have specialised themselves as tax havens. Although Malta has no conspicuous nominal tax rate, but refunds a high proportion of taxes to foreign investors at their request, with the result of a very low real tax rate. Cyprus has specialised in the management of money capital. The activities of these countries are founded upon very large investments in the educational system.

Among the countries that are below the international average both in the prevention by educational investments as well as in the aftercare social spending we find the Russia, Romania and Bulgaria. Slovenia, as an exception among the post-socialist countries, is already above the international average for social protection. The emerging markets of India and China as well as Turkey are clearly below the international average both in terms of prevention by educational investments as well as in aftercare social spending.

In contrast to South Korea, which focuses clearly on prevention by investments in education, research and development, Japan is a more traditional country that focuses more on aftercare social spending. Germany also belongs to these traditional countries, since it ranks on place 9 in aftercare social spending, but ranges only on place 24 in the forward-looking investments in education.

Hence there is partial evidence for the distinction of four *educational and welfare regimes* (see table 5-1.).

Table 5-1: Educational and welfare regimes

Pronounced prevention through education	Activating society (focus on capability and prevention)	Developed educational and welfare state
Little prevention through education	Underdeveloped educational and welfare state	Traditional (passive) welfare state
	Little aftercare social spending	Pronounced aftercare social spending

Model: Dieter Holtmann

Social-democratic countries, in particular Denmark, rely on prevention through education, but also provides a well-developed social safety net for the case of risk events. The economically liberal US and in particular the productivist South Korea focus on prevention by investments in education and leave the protection against risks to private responsibility. Familistic countries such as Italy set their

priority on aftercare social spending and neglect the prevention through investments in education. Less developed countries such as India and China as well as Turkey also invest primarily in infrastructure, but neither sufficiently in aftercare social spending nor in prevention through educational investments. The post-socialist countries are mostly still in catching-up process of development and, with the exception of Slovenia, still range below the international average in terms of prevention by educational investments.

5.2 Autonomy as the capability to self-determined action in the different countries and welfare regimes

Autonomy as socially desirable goal

In the centre of the normative theory of Nobel laureate Amartya Sen stands the concept of freedom. According to Sen (2002) it is too one-sided to define the quality of life of individuals and entire societies only on the basis of their material wealth, as was practiced for long, e. g. in the poverty and wealth reporting. Instead it is more adequate to assess the individual life circumstances and the overall social development with the criterion of realisation of life chances. By realisation of life chances Sen understands the capacity of people to lead a self-determined life, i. e. to pursue the way of life that they have good reasons to appreciate. This implies that people should get the capability to recognise their own way of life, to judge and select between alternative ways of life deliberately and with good reasons. To achieve this, on the one hand the individual potential of people need to be developed, e. g. by access to educational institutions, on the other hand also limitations to actions and lack of freedom must be removed. To have the possibility to lead a self-determined life depends not only on the intellectual ability, but also on the external conditions.

Also the comparison of countries and welfare regimes can be based on the concept of capacities of life chances: “The success of a society according to this view is primarily to be evaluated by how big the substantial freedoms realised by its members are” (see Sen 2002: 30). Of course it is complicated to set up an empirical measurement model for substantive freedoms, because for this many and very different aspects must be taken into account: education, income, political and civil liberties, working conditions, a secure habitat, etc. All these aspects play a role, when assessing the autonomy of a person. The following analysis particularly concentrates on the educational opportunities and basic capabilities as well as the subjective evaluation of freedom of choice by the people of different countries and welfare regimes. While these features do not form sufficient criteria for autonomy, they are, however, necessary prerequisites for autonomy.

Selection of indicators

Although the chances of realising self-fulfilment must not be reduced only to educational chances, cognitive resources are of course a key prerequisite for the real freedoms that an actor enjoys. As indicators for the objective conditions for autonomy, we therefore consider the expenditures on education, tertiary educational attainment (*certificates*) as well as the educational abilities acquired in the school system (average and peak of the *competences* according to PISA). The problems of income poverty and income inequality as well as educational poverty are discussed separately in the chapter on social equality (see section 6.9). Furthermore, we consider the subjective assessment (by the society members) of the freedom of choice concerning the way of life.

The investment in education systems (as a percentage of GDP) may be regarded as an indicator of the willingness of a society to invest in the education of people and to enable them to self-determined action. Public and private expenditures on education are considered together, since educational processes, in our opinion, are always beneficial for the chances of realising self-fulfilment – regardless of the financial source.

The results of the educational investments are shown by two aspects: on the one hand, we measure the percentage of the population, which has tertiary qualifications (*certificates*). This segment of the population is likely to have particularly good chances of realising self-fulfilment, because with tertiary education, individuals not only acquire skills and knowledge to a high degree, but at the same time, they have also increasing chances of achieving a skilled job and an above average income on the labour market, that is, they achieve economic autonomy, too.

On the other hand, we use as indicators the competence measurements according to PISA (*competences*). For this, we firstly take into account the average reading ability of 15 year old pupils. Through international studies coordinated by the OECD, comparative data on the performance of the education systems were obtained in very good quality. The scale used here from the PISA 2015 represents the reading literacy, understood as the ability to understand written texts, to use and to reflect on them in order to achieve one's goals, to develop one's knowledge and potential as well as to participate in society (see Prenzel et al. 2004: 20). The PISA tasks were not aimed at a school-based curriculum, instead everyday reading situations as well as the targeted application of reading skills in different contexts were focused on. Secondly, we consider the proportion of pupils with reading literacy at level 5 or above, to assess the “peak” in reading literacy (PISA 2015).

Out of these four indicators, we form the additive index of “objective autonomy” in the sense of conditions for the actual use of the formal “freedom of choice”.

In order to determine the degree of freedom of choice, we consider as a further aspect, the subjective assessment of the freedom of choice, by the society members: “In this country, are you satisfied or dissatisfied with your freedom to choose what you do with your life?” (Gallup 2015).

Out of the index for “objective autonomy” and the indicator for “subjective autonomy”, we then form the overall index for autonomy with the same weight for the “objective” and the “subjective” autonomy. Altogether, the investments in education as well as the educational certificates and educational competences are used as indicators for the population’s capability through education as objective conditions for autonomy and the subjective assessment of the freedom of choice by the respondents in the various countries as “subjective autonomy”.

Autonomy in country comparison

The willingness to invest in education is most pronounced in the social democratic countries Denmark, Sweden and Finland, as well as in the UK and in Cyprus and Malta, which spend about 7-9 % of its GDP for education. Germany invests a total of 5,5 % of its GDP in education and is therefore only on place 24. At the end of the ranking one finds China and India as well as Romania.

The highest population share with tertiary education is to be found in the economically liberal countries Canada and the USA, in the productivist countries Japan and South Korea as well as in Russia and Luxembourg. Germany ranks on place 27: only 27,1 % of Germans have a tertiary education qualification. The share of tertiary graduations is particularly low in the post-socialist countries Romania and Serbia, in Italy and in Turkey, in the emerging markets of Brazil and South Africa as well as in China.

The highest average reading competency is to be found in the productivist welfare regime of East Asia with its competitive education systems. Canada ranks at the top of the 43 countries considered, which is mainly due to the good integration of migrants. Finland ranks slightly behind Canada on place 2, probably because of its integrated school system with individual support, but also because of its low share of migrants, since children with a migration background are significantly worse off in Finland than the other children. With 509 points the German 15-year-olds rank by now above the OECD average (493 points in 2015). In the comparison of the states considered here, Germany has now improved to place 8. The worst average reading performances are to be found in Romania, Bulgaria and Turkey, and at the very end in Brazil.

Considering the top performers (with reading competency level 5 or above) the productivist welfare regime of East Asia ranks at the top with the highest mean share of such pupils. The economically liberal countries Canada and New

Zealand reach the first and third place at the “PISA top”, probably because of the good integration of migrants and their effective school systems. Finland also has an effective school system and reaches the second place, but the pupils with immigration background in Finland are much worse off than the other pupils; the share of these pupils is so small that this weakness has not so much weight. With 11,7 % of pupils with high reading competency Germany has improved strongly from place 14 in 2012 to place 7 (of 40 countries) in 2015. The smallest shares with higher reading competency are to be found in the post-socialist countries Romania and Serbia as well as at the very end in Turkey and in Brazil.

When the four indicators are combined to an index for the objective prerequisites for autonomy, Canada is at the forefront of capabilities through educational investments and educational outcomes in the form of certificates and competencies. This is certainly due to the good integration of pupils with a migration background into the school system. Finland ranks second in objective capabilities for autonomy, but in Finland the competencies of pupils with a migration background and the other pupils are very different; this has no weight for the average, because there are only a few migrants in Finland. The productivist South Korea reaches third place with its competitive education system. Germany is in the midfield with place 17 of 43 countries. On the other hand, Romania and Turkey as well as the emerging markets of Brazil, India and China rank at the very end (with no PISA evaluations for India and China for the country as a whole).

Considering the subjective assessment of the degree of freedom of choice (% satisfied with freedom to choose), the socio-democratic countries Norway, Sweden, Denmark and Finland, the economically liberal countries Australia and New Zealand as well as the conservative country Switzerland rank at the top. But with 90 % satisfaction Germany on place 12 also still belongs to the top group. Extremely low is the satisfaction in the crisis country Greece with 39 % of the population, which is the lowest value of all countries considered. Moreover, satisfaction with the freedom to choose is also comparatively very low in the post-socialist countries Serbia, Lithuania and Croatia as well as in Turkey.

If the “objective autonomy”, i. e. the sub-index to the objective prerequisites for the capability to autonomy on the basis of educational investments and educational results, and the “subjective autonomy”, i. e. the subjective assessment of the freedom to choose of the populations in the various countries, are combined with equal weight in an overall index, the economically liberal countries Canada and New Zealand as well as the social democratic countries Finland, Norway, Sweden and Denmark rank at the top. With place 13 among 43 countries, Germany by now belongs to the first third. Objective and subjective autonomy altogether are very poorly pronounced in Serbia, in Turkey and especially in the crisis country Greece.

On the development of the expenditures on education

Predominantly, there is continuous rise in both absolute expenditures on education and in their proportion of GDP.

According to Eurostat, the share of education expenditures of the front runner Denmark rose from 7,4 % in 2005 to 7,8 % in 2009. In Germany, the increase from 5,1 % in 2005 to 5,3 % in 2009 took place at a lower level.

In the OECD countries, educational expenditures as a proportion of GDP rose from 2008 to the crisis year of 2009 on average from ca. 4,9 % to ca. 5,2 %, which should be in particular due to the fall in GDP, as the absolute expenditures on education cannot be changed so quickly. From 2010 to 2012/2013, this share remained constant at about 5,2 percent, according to OECD 2016.

On the development of tertiary education

In the EU27 the share of the population (from 25 to 64 years) with tertiary qualifications has risen steadily from 22,5 % in 2005 to 29,3 % in 2014. In Germany the share rose from 24,6 % in 2005 to 27,1 % in 2014.

In the OECD the share of the population (from 25 to 64 years) with tertiary qualifications rose from 26 % in 2005 to 34 % in 2014. In Canada, the leading country, the increase from 46 % in 2005 to 54 % in 2014 took place at the highest level. South Korea shows a particularly strong increase in the share of people with tertiary education degrees from 32 % in 2005 to 45 % in 2014, which fits into the systematic rise of South Korea through investments in education, research and development.

On the development of the mean reading competency

Canada is at the forefront in average reading competency. Already since 2000 Canada belongs to the top, even if in the meantime it lost some performance points. This should be due to the fact that Canada is very successful at integrating children with a migration background into the school system.

Finland, with its universalistic educational system, belongs to the top of the development of average reading competency from 2000 to 2015, even though it lost some performance points between 2000 and 2012, according to the PISA studies. In Finland, pupils with a migration background are significantly worse off than the rest, but this has not so much weight for the average, since there are only a few pupils with a migration background in Finland.

The high priority of education in East Asia is demonstrated by the very good performance of Japan and South Korea. The productivist welfare regime is at the

top of the welfare regimes in terms of average reading competency. Compared to 2000, however, both countries lost some performance points by 2015.

Germany has reacted to the below-average performance of the divided school system in 2000 with reforms, which point from a three-tiered into a two-tiered system and seek to compensate for disadvantages, in particular through additional language courses. As a result, both the “social inheritance” of the educational success rate and the average performance has been increased by 2015, with improvements of the disadvantaged and constant accomplishments of the more privileged.

On the development of the share of PISA top reading performers

Canada, which is the front runner in this criterion in 2015, increased the share of pupils with high reading competency (level 5 or higher) from 12,8 % in 2009 to 14,0 % in 2015. In Finland (place 2) the share of the top readers fell a little from 14,5 % in 2009 to 13,7 % in 2015.

Germany has improved its share of top readers from 7,6 % in 2009 to 11,7 % in 2015. This means that Germany ranks on place 7 in 2015, in particular because it responded to the “PISA shock” of 2000 with stronger support for disadvantaged pupils.

The competitive productivist welfare regime ranks at the top of the welfare regimes in the average share of top reading performers in 2015, with South Korea reaching place 4 and Japan place 11 among 40 countries.

On the development of subjective autonomy

In the subjective assessment of the degree of freedom of choice, the social democratic welfare regime ranks always at the top from 2007 to 2014, according to the Gallup data. From a population share of 94 % with subjective autonomy, this share drops slightly to 92 % in the crisis year of 2009, but is recovering again to 94 % by 2014. Since 2010, Norway has always been at the top with 95-96 %.

The economically liberal and conservative welfare regimes fell from a level of subjective autonomy of 88-89 % before the crisis to 87 % in the crisis year 2009, but recovered to a share of 89-90 % by 2014, which agreed with the extent of their freedom of choice.

The extent of subjective autonomy is much lower in the other three welfare regimes. In the familistic welfare regime the population share with subjective autonomy declined from 76 % in 2007 to 69 % in the crisis year of 2009, but rose somewhat on average to 70 % by 2014. The extent of subjective autonomy in the productivist welfare regime decreased from 71 % in 2007 to 64 % in the crisis year of 2009, but recovered to 69 % by 2014. The average level of

subjective autonomy in the post-socialist country group decreased from 66 % in 2007 to 60 % in the crisis year of 2009, but rose again to 68 % by 2014.

As a single country, Greece is the most affected by the crises. In Greece the subjective autonomy fell from 58 % in 2007 to 44 % in the crisis year 2009; after a recovery to 53 % in 2011, however, with the euro crisis the subjective autonomy fell sharply back to 37 % in 2014. The latter is the lowest subjective assessment of the population among all 43 countries considered.

Objective versus subjective autonomy

If one confronts the objective and subjective autonomy ($r = 0,62$), the economically liberal countries Canada and New Zealand as well as the social democratic countries Finland, Norway, Sweden and Denmark are at the forefront. These countries rank at the top in both objective and subjective autonomy; they all have successful educational systems and are very positively evaluated by the population regarding freedom of choice.

The total autonomy in Serbia and Turkey as well as in the crisis country Greece is particularly poor. In the latter case, the assessment of freedom of choice by the population is the worst among all countries. In productivist South Korea the objective skills are very strongly developed because of the competitive educational system, but the population's assessment of freedom of choice ranges below the average. Conversely, e. g. in Malta, objective skills range below the average, but the subjective autonomy of the population in Malta with its growing standard of living belongs to the first third of the countries considered. In Germany, the results go into the same direction, only somewhat more favourably: with respect to the objective preconditions for freedom of choice, Germany ranges only in the middle with place 17, but in the subjective assessments of freedom of choice by the population, Germany is performing well with place 12, so that with place 13 in the overall index of objective and subjective autonomy it now belongs to the first third of the 43 countries considered.

6. Prosperity after the global financial crisis, prosperity versus ecological sustainability, equality of participation

Economic prosperity and economic growth are seen as worthwhile targets almost anywhere in the world. The social-democratic, the economically liberal and the conservative welfare regimes are, on a world scale, with regard to the level of prosperity on a very similar level at the top of welfare regimes (see chapter 6.1).

In the context of the global financial crisis, the familistic countries of Southern Europe have stagnated, and have thus staid behind compared to other countries, while the productivist countries of East Asia, especially South Korea, as well as China are among the most successful economic climbers in the context of the world financial crisis. The speculative business that led to the world financial crisis has thrown back the countries involved, while the emerging economies with their normal business models have at the same time relatively risen (see chapter 6.2).

If the development of prosperity is designed with respect to ecological sustainability, the damages caused by economic growth can be minimized and the utility of prosperity can be increased. Humanity consumes more resources than nature can regenerate. Already today, a description of the climatic change is alarming. The consequences are manifold and serious. Obviously, the goal of establishing material prosperity at a high level collides in part with the claim of being ecologically sustainable. The wealthy states thus have a dual political need to attach greater weight to ecology. In the coming decades, they have to find exemplary ways to produce their prosperity through a reduced use of natural resources. If one compares the countries, the highest environmental impacts also take place from the wealthy countries (see chapter 6.3).

The formal rights of freedom, which characterize democratic societies, in reality cannot be used by all citizens to the same amount; the exercise of civil and political freedom is linked to prerequisites and capabilities. Social rights, which guarantee a basic material supply, make possible a civil society that offers everyone the opportunity to participate. An adequate distribution of prosperity is intended to provide each actor with the material prerequisites so that he can participate in the social interactions as an equal participant. An exact equilibrium of material goods is not necessary for this, but inequality must not be so great that it prevents the possibility of equal participation in social interactions for some citizens (see chapter 6.4).

6.1 Prosperity and growth: a comparison of countries and welfare regimes

Prosperity as a socially desirable goal

Economic prosperity and economic growth are seen as a worthwhile goal by the political authorities almost anywhere in the world, and not rarely, policy measures are tailored to the extent that they are beneficial to these goals. However, as for example Amartya Sen (2002, p. 25) argues, a good economic performance has no intrinsic moral value.

The maximisation of the economic performance of a country is therefore not an end in itself, but only becomes a desirable goal through the derived values. These moral values, which are associated with economic prosperity, include, for example, a better supply of the citizens with public and private goods, and thus a higher material living standard, a weakening of conflicts about distribution, a

declining number of unemployed persons, and, last but not least, also an improvement of subjective well-being. The migration streams of this world process mainly towards higher prosperity and greater freedom.

However, economic indicators, such as gross domestic product (GDP) per capita, show only the average level of material well-being that is determined with respect to all individuals. It is desirable from a normative perspective to live in a society where people are doing well on average; however, the distribution of material wealth to individual actors or to certain population groups is not taken into account in such an aggregate value. From our point of view, therefore, it seems appropriate to regard the level of prosperity and growth on the one hand and, on the other hand, also to take into account how the prosperity is distributed among the population, when assessing the qualities of societies.

Selection of indicators

Gross domestic product (GDP) is a measure of the economic performance of an economy. GDP is the total value of all goods and services produced within one year and within a national economy for final consumption. For a country comparison, it is first necessary to make GDP relative to the population, and second, to consider the different price levels in the individual countries. The GDP is accordingly reported per capita and adjusted for purchasing power and inflation differences on the basis of Purchasing Power Parity (PPP)³. The indicator represents the economic strength or the average material prosperity of a country. In addition to prosperity, the average growth rate of GDP is reported as a percentage of GDP over the period from 2006 to 2016 (status: October 2016).⁴ The growth rate measures the change in GDP compared to the previous year.

The standard of living in country comparison

The international comparison shows that the greatest *economic prosperity* is to be found in the financial centre and city state of Luxembourg, which, however, is hardly comparable with state areas. With some distance, on the next rank one finds the economy of Ireland, which has well recovered from the financial crisis, and social democratic Norway.

³ For the determination of the purchasing power parity, it is calculated how many units of each national currency are necessary to buy a particular representative basket of goods that an actor could receive for one US dollar in the USA.

⁴ The average growth rate for each country is calculated by the tenth root from the ratio of GDP 2016 to GDP 2006.

The contrasts between the richest and the poorest countries in our selection are very strong. With place 9 Germany belongs to the first third of the countries and thus ranks slightly behind the Netherlands and Sweden. The economic disparities between the old and new federal states in Germany have not yet been completely overcome.

The rise of the productivist South Korea is one of the strongest in the context of the global financial crisis and has now reached the level of prosperity directly behind Japan.

Among the familistic countries Malta, with its low level of real taxation on foreign direct investment, coped by far best with the financial crisis, leaving all other familistic countries behind. Greece, on the other hand, proved to be little competitive in the stress tests through the global financial crisis and the euro crisis.

The post-socialist countries are mainly placed at the end of the ranking, although there are large differences within this group, e. g. between the Czech Republic (place 23), Slovenia (place 24) and on the other hand Serbia (place 41).

Among the BRICS countries, with respect to the standard of living Russia ranks ahead of China, Brazil, South Africa and finally India. India reaches less than half of the prosperity level of China (operationalised by the GDP per capita).

The strongest *economic growth* is to be found in India and especially in China, which are developing the most dynamically. This has contributed to the weakening of the economic crisis following the global financial crisis.

Due to its orientation towards the internal market, Poland has been relatively unaffected by the economic crises and, concerning economic growth over the past decade, ranks on third place behind China and India. Estonia, Latvia and Lithuania were hit particularly hard, during the crisis year of 2009, with their growth model, which was loan-financed in foreign currencies, but they also recovered as fast by means of rigorous restructuring measures. From the six welfare regimes considered, the group of post-socialist countries has grown the most strongly during the last decade with an average of 3,5 % per year, but still lags behind the other welfare regimes in its catching-up process with respect to the standard of living.

South Korea is also pursuing its rise on the world market with success, which is why the productivist welfare regime ranks on second place with regard to economic growth over the past decade.

From the economically liberal countries, during the last decade, Ireland has risen by far the most, with an average growth of 4,0 % per year, while the economically liberal welfare regime altogether rose with an average of 2,6 % per year.

Germany has grown by an average of 2,8 % per year in the last decade, by which it ranks on place 16. The group of conservative countries has a moderate average growth of 2,1 % per year in the last decade.

The social democratic countries have, on the average, the highest standard of living; on the other hand, prosperity has grown only moderately in the last decade by an average of 1,6 % per year. In the last decade, Sweden rose with 2,4 % per year just like the international average, but Norway, Finland and Denmark are only weak in economic growth with places 36, 39 and 40 among the 43 countries considered.

Among the familistic countries, only Malta with an average growth of 4,1 % rose more strongly than the international average during the last decade. However, during the last decade the familistic welfare regime overall scores the worst in terms of economic growth, with an average of 1,2 % per year. In the last decade, Greece, which proved to be the least competitive in the stress tests through the global financial crisis and the euro crisis, was the only one of the 43 countries considered to suffer a decline in the standard of living, namely with an average of 0,9 % per year.

In economic growth, the initial level plays a major role. It appears to be easier to get a high rate of growth from a lower initial level. If a country has already reached a very high welfare level, it may be more difficult to achieve the same relative growth. Due to this basis effect the growth rate is also reported only in addition to the level of prosperity. As a Western European country, Ireland is a particularly interesting case. Before the financial crisis, the country has achieved unprecedented economic growth within approximately fifteen years and has transformed itself from a low income agrarian economy on the fringe of Europe into a modern economy, which now saw itself in a central position between the economies of North America and Europe. This growth process was abruptly interrupted by the banking crisis in Ireland. In the meantime, however, Ireland has already recovered very well and is even in second place among the 43 countries considered, which is also due to the relocation of multinational companies.

On country level, there is a highly significant correlation coefficient of $r = -0,59$ (excluding the outlier Luxembourg) between the level of prosperity and the growth rate, which means that high relative growth is usually more difficult to achieve if the level of prosperity is already very high.

The change in the level of economic prosperity from 2006 to 2016 shows that, for example, Ireland has recovered very well after a setback by the Irish banking crisis and now reaches second place in the standard of living. As an international financial centre, the city state of Luxembourg ranks at the top with some distance before Ireland and Norway with its oil wealth.

Germany improved from the 14th to the 9th place in the last decade, and is thus one of the top upwardly mobile countries with respect to the standard of living.

In the global financial crisis and in the euro crisis, most countries in the south have fallen behind, Cyprus and Italy each by five places, Portugal by three places, and Greece descended most strongly in the last decade with a decline of eleven places due to its low competitiveness. On the other hand, Malta has risen by five places with its low level of real taxation of multinational corporations.

With the productivist model of economic rise by technology-driven export successes on the global markets, South Korea ascended most strongly in the last decade, namely by nine places.

In Eastern Europe there were also relatively strongly ascending countries by five places each, namely Poland with its orientation to domestic markets and Lithuania.

China, with its high growth rates in the last decade, moved from the penultimate position of the 43 countries to the 39th before Serbia, South Africa and Brazil, while India remained in the last place, despite its notable growth.

On the development of the standard of living

Luxembourg as a city state is not so well to be compared with other states. As an international financial services centre, the standard of living (GDP per capita PPP) stands at the top of the countries considered. In the crisis year 2009 the GDP fell by 6,5 %, but this was compensated again by the end of 2012. Ireland, which currently holds second place in the standard of living, has experienced a spectacular ascent and descent as well as a revival. The rise of the “Celtic tiger” ended in the financial and banking crisis with a decline of the GDP by 4,9 % each in 2008 and 2009. The strong revival culminated in extreme growth rates of 10,0 % in 2014 and 26,9 % in 2015, which is also due to the relocation of multinational companies. Norway, which is on third place, also has special conditions, since it also benefits from the natural oil wealth. In the crisis year 2009 GDP declined by 2,0 %, but the economy grew again by 3,3 % in 2012. Switzerland, which ranks on fourth place, is one of the countries that came well through the crisis. Although GDP in Switzerland fell by 2,8 % in 2009, this was more than offset by growth rates of 3,0 %, 2,9 % and 1,9 % from 2010 to 2012. As the real cause of the global financial crisis, the USA (fifth place) has emerged relatively well from the crisis with flexible economic policy. After the slump of the GDP by 2,9 % in the crisis year 2009, GDP in the USA rose already again by 3,0 %, 2,9 % and 3,3 % from 2010 to 2012.

Even in the crisis year 2009 China grew by 9,5 %, thereby contributing to the stabilisation of the global economy. In the following years 2010-2012, China also grew strongly by 11,4 %, 11,2 % and 9,3 %. India is still far behind in the average standard of living. However, in the crisis year 2009 it grew by 7,8 %

and also in 2010-2012 the growth was altogether strong with 10,0 %, 6,8 % and 5,4 %.

Since the reunification Germany ranked only at the end of the first third because of the not yet completed assimilations, but has by now advanced to the ninth place. Due to the very strong export dependency, Germany crashed strongly with 4,6 % in the crisis year 2009, but it did well with economic stimulus packages, short-term work and export successes in the recovery of the global economy with growth rates of 5,3 % and 7,7 % of the GDP in 2011 and 2012, respectively.

6.2 The development of prosperity in the different welfare regimes

The social democratic, the economically liberal, and the conservative welfare regime, which Esping-Andersen differentiates in his modern classic “The Three Worlds of World Warfare Capitalism” (1990), are at a very similar prosperity level. The social democratic welfare regime is slightly ahead, the economically liberal and the conservative a little behind it.

In this prosperity process, the USA, the actual origin of the world financial crisis, as well as the economically liberal countries on the whole, performed somewhat better than the conservative countries on average.

The productivist countries of Japan and, in particular, South Korea, belong to the most successful economic climbers in the world financial crisis and have left the familistic welfare regime behind with respect to average prosperity.

The familistic countries of Southern Europe have stagnated on average, with Greece and – due to the commitment of the Cypriot banks in Greece – eventually also Cyprus have economically fallen behind.

The post-socialist countries of Eastern Europe are on average in a moderate upward trend after the world financial crisis.

The economy of Turkey has come relatively well through the world financial crisis, but the economic perspectives of Turkey are strongly dependent on the further political developments.

The emerging markets of Brazil and South Africa are at a very similar level of prosperity and are currently rather stagnating.

Besides the productivist countries, China is one of the economic climbers in the context of the world financial crisis and pursues economically a very stable growth path. Even in the general crisis year 2009, China still grew by about 9 %, thus contributing to the stabilisation of the global economy. – India finally starts with the lowest level of prosperity among the 43 countries considered. It also

shows high growth rates, but from a very low prosperity basis. Even in the crisis year 2009 economic growth in India was still about 7 %.

Altogether, therefore, the familistic countries of Southern Europe have stagnated in the context of the world financial crisis, and thus have stayed behind with regard to the level of prosperity, while the productivist countries of East Asia, especially South Korea, and China are among the most successful economic climbers in the context of the world financial crisis.

The speculative business that led to the world financial crisis has thrown back the countries involved, while the emerging economies have comparatively risen with their normal business models.

The causes for the performance results in the economic management of the world financial crisis are manifold. In addition to basic investment in education, research and development as well as in infrastructure, competitiveness, export efficiency, gender equality and integration as well as social security systems play a role as stabilisers in addressing the challenges posed by economic crises. When the development of prosperity is designed in due consideration of environmental sustainability, the damages caused by economic growth can be minimised and the utility of prosperity can be increased.

6.3 The downside of prosperity and growth: Ecological sustainability

Ecological sustainability as a socially desirable goal

Humanity consumes more resources than nature can regenerate – even though only a small proportion of the world population participates in the economic prosperity. In 1998 the richest fifth of the world's population consumed more than two thirds of the electricity provided and they held nearly nine out of ten cars in its possession (see UNDP 1998). If it were possible to transfer the material standard of living of the Western societies all over the world, this would go many times beyond the capacities of the biosphere to regenerate and lead to an ecological crisis of global dimensions. A catch-up development for the sake of justice would be "the mother of all disasters" (see Sachs 2004).

Even today a description of the climatic change is alarming. In particular, the consumption of fossil fuels and the resulting emissions of carbon dioxide (CO₂) have become a global problem. The CO₂ content in the atmosphere has risen by 35 percent since the beginning of industrialisation, is currently on the highest level of past 650,000 years, and has increased further up to now in a still accelerating speed (see IPCC 2015). The consumption of natural resources grew steadily and with it also the overloading of the biosphere (since 2013 a stabilisation has become apparent).

The consequences of CO₂ emissions are numerous and severe. The years 1983 to 2012 were the warmest 30 years over the last 800 years and a further warming of at least 1,8°C is projected for the current century. Thus, the snowy areas and

glaciers will melt, sea levels will rise, extreme weather, rainfall, droughts and heat waves will be accumulating. Even with an immediate stop of CO₂ emissions these developments would not entirely end (see IPCC 2015).

At the UN Climate Change Conference in Paris in 2015 the Assembly decided to limit global warming to 1,5°C. However, there are no sanctions for non-compliance with the agreed points.

Apparently the goal of establishing material wealth at a high level all over the world collides partially with ecological sustainability. Sustainable development is defined as development that "meets the needs of the present without compromising the ability of future generations to be able to meet their own needs" (WCED 1987: 8). The inter-generational equity demands that natural resources are not depleted by the current generation. This distributive justice also requires that natural resources and environmental pollution are not divided asymmetrically between rich and poor countries.

The wealthy countries are thus in a double way politically in the duty to give ecology a higher weight. In the next few decades they need to find exemplary ways to significantly reduce the overuse of the natural environment and to produce their wealth by a lower use of natural resources. The wealthy countries are responsible for the highest pollution across the countries considered. There is a significant positive correlation ($r = 0,57$) between economic prosperity and CO₂ emissions for the 43 countries in our analysis, among which some of the richest economically liberal states have particularly high CO₂ emissions.

Without the transition to a "resource-light style of prosperity" (Hawken et al. 2000) the burden on future generations can be devastating, who then have to live with the problematic and potentially irreversible ecological changes. For such a transition especially three strategies are discussed:

1. The efficiency strategy seeks to increase resource productivity, thus trying to make the production of goods gradually ecologically more efficient. Efforts here are directed to the reduction of the resources required per unit of production. In our empirical country comparison an indicator of energy efficiency is taken into account.
2. A second strategy is the strategy of substitution by which one tries to replace fossil fuels by renewable energies in energy production. Compared to fossil fuels, renewable energies are less restricted and the risk to damage the natural environment is avoided. The substitution strategy, too, is taken into account in our empirical comparison with an indicator.
3. The so-called strategy of sufficiency intends to decouple quality of life from economic growth. Quality of life not only depends on the material

wealth, but is also based on various non-monetary aspects. The sufficiency strategy aims at changing lifestyles as well as consumer and leisure behaviour of people to reach the result of an environmentally sustainable as well as a meaningful and valuable life for people.

An adjacent term for sufficiency is the concept of consistency in the sense of production and consumption in accordance with the natural cycles. Our indicator of the proportion of organic agriculture in the whole agriculture stands for a “sufficient” life as well as one consistent with the natural cycles. This is an indication of the proximity of the two terms. If one takes non-renewable resources as an example of illustration: Efficiency means to use these resources (more) effectively. Substitution states that one replaces fossil resources by renewable ones. Sufficiency includes changing the way of life (production and consumption) so that the consumption of non-renewable energy is reduced or avoided. Ecological consistency states linguistically a production and consumption in accordance with the natural cycles. The extent of reduction and avoidance is not yet determined by this definition. The Research Institute of Organic Agriculture and the Federation IFOAM define organic agriculture by the four principles of health, ecology, fairness and care. The proportion of organic agriculture should be suitable as an indicator for both the general concept of sufficiency as well as for the general concept of consistency. On the basis of these measurements no country achieves a share of 20%, i.e. the respect for the principles of ecology – here for the example of agriculture – is still completely inadequate. Climate change is a definite alarm signal.

Selection of indicators

In order to detect ecological sustainability comprehensively, on the one hand indicators are reported that measure various environmental burdens, on the other hand indicators are used which quantify the extent of relief efforts being pursued by individual countries.

As an indicator of ecological burden, we first report the CO₂ emissions per capita. These emissions are considered the major cause of increasing global warming and climate change. Furthermore, the waste load per capita informs about the consumption of natural resources. Finally, we use the energy component which is generated by nuclear power. Nuclear energy not only raises again the question of technical controllability. In particular the environmental impact is further increased by the disposal of highly radioactive waste, and this for many future generations.

As an indicator of ecological discharge we first consider energy efficiency. One way to achieve an environmentally sustainable form of economy is to use energy resources more efficiently through technical innovation. This approach aims at reducing the natural resources that are required for the production of certain goods steadily. The energy efficiency is measured by the GDP (PPP) which is

achieved per unit of fossil energy consumption (World Bank 2015). A country that manages to produce its economic prosperity with the least possible consumption of fossil fuels (i. e. from the limited fossil fuels such as oil) would do well in this indicator. Unlike fossil fuels renewable energy sources have virtually no limits of supply. Sun, wind, geothermal energy and water power can be regarded as practically inexhaustible source of energy that also ecosystems with less strain than e. g. coal power plants.⁵ The substitution of fossil fuels by renewable energy sources is an effective sustainability strategy. Therefore, the proportion of total energy consumption of a country, which is currently covered by renewable energy sources, is selected as a second indicator. Third, we measure the strategy of sufficiency by the share of agriculture which is environmentally sustainable farming. This indicator represents a very basic strategy by which a precautionary prevention of environmental damage can be achieved.

Model with differentiation of levels of ecological burden and relief efforts (Dieter Holtmann)

In order to assess the extent to which a society is designed in consideration of ecological sustainability I propose to distinguish between indicators of ecological burden and indicators for the relief efforts. The aspects of the levels of burden and the relief efforts can vary logically independently and empirically they do. A partial conflict of goals then exists, more specifically, between the standard of living (e. g. in the form of consumption) and the ecological burden. To illustrate the analytical distinction between these two dimensions I propose a two-dimensional representation of the level of ecological burden vs. relief efforts. It is an empirical question to what extent individual societies respect these aspects.

Comparison of countries

As expected, the countries which comparatively have a low level of prosperity also burden the environment less. This again illustrates the conflict between the socially desirable goals of *prosperity* and *environmental sustainability*.

In particular the less developed countries India, Brazil, the post-socialist countries Latvia, Romania, Lithuania and Turkey thus have the lowest CO₂ emissions. On the other hand, the city state of Luxembourg and the

⁵ However, it is to be considered that the natural conditions in some countries can facilitate energy production from renewable energy sources. Iceland, e. g. wins by favourable natural conditions, to cover the entire demand for electricity by water power and geothermal energy. This performance would not be possible under other natural boundary conditions.

economically liberal countries Australia, USA and Canada have the highest CO₂ emissions per capita. Germany is only ranked 33rd of the 43 countries.

The less economically developed countries such as India and China as well as Brazil and poorer post-socialist countries such as Romania are also have the least amount of waste per inhabitant and thus rank at the top. On the other hand, the rich economically liberal countries Canada, USA and Australia, but also Denmark, Switzerland and the city state Luxembourg have the highest amount of waste. With the 34th place Germany belongs to the last third of 42 countries.

There is a whole series of countries that completely renounce nuclear power. After the nuclear disaster in Japan in 2011 it is one of those countries since 2014, but the further development is still open. France holds the highest nuclear share which currently covers 76,9 % of its energy needs. Slovakia and Hungary also have high nuclear energy shares, namely more than 50%. Germany with its 26th place of 43 countries ranks at the end of the midfield.

When we now sum up all these ecological burdens in a sub-index for the level of these ecological stresses, the following picture results: besides the poorer emerging countries of India, China and Brazil the ecological burden is also low in Latvia. The economically liberal countries USA, Canada and Australia with its pure focus on growth as well as the city state of Luxembourg and France (with its nuclear energy) pollute the environment comparatively the most. With the 34th place Germany belongs to the last third of the countries.

The extent to which ecological relief strategies are pursued also varies greatly between countries. The economically most efficient use of primary energy can be determined for Malta, Switzerland and Ireland. Germany (rank 14) has a relatively efficient use of primary energy, too. With considerable distance Russia can be found at the end of the ranking, which discloses a careless use of the abundant fossil energy. Russia spends about four times as much primary energy – compared to Ireland – to produce the same amount of economic prosperity.

Norway holds with clear distance the highest amount of energy from renewable energy sources, in particular the water power is used intensively. In the top group Norway is followed by the social democratic countries Sweden and Finland as well as Brazil, Latvia and New Zealand. Germany holds a share of energy from renewable energy sources of 13,8% and thus ranks on the 24th place of 43 countries. At the end of the ranking we find the East Asian countries South Korea and Japan as well as Russia with its abundance of fossil fuels and Luxembourg as city state.

In sustainable agriculture Austria as well as Estonia and Sweden are at the top. In Germany (rank 14) the agriculture is managed in ecological sustainability in only about 6% of the whole area. In quite a lot of countries the proportion is even close to zero, for example, in all BRICS countries that fully focus its priority on economic growth.

The sub-index *relief strategies* is led by the conservative countries Austria and Switzerland, as well as the social-democratic countries Sweden and Norway and also Latvia. Germany ranks on the 17th position. The economically liberal countries Canada and the United States as well as the growth-oriented countries of China and South Korea, South Africa and finally Russia rank at the very end. Russia does not take care of its environment probably because of its mineral wealth. It is striking that the United States ranks at the 39th place, though it would obviously have the know-how for further relief efforts.

In the overall index of environmental sustainability, which is calculated as the average of the standardised partial indices for the level of ecological burden and the ecological relief efforts, Latvia is leading because it belongs to the top in both sub-indices. Latvia is followed by Austria, Norway and Sweden due to their strong relief efforts as well as by India and Brazil because of their low ecological burdens (see also figure 6-14). Germany (place 31), with an index value of -0,39, ranks below the average of the 43 countries. The economically liberal countries USA, Canada and Australia as well as the resource-rich Russia show the worst results.

On the one hand, the USA and Canada pollute their environment most heavily; on the other hand, Russia has the least relief efforts.

Level of ecological burden and relief efforts

The juxtaposition of the level of ecological burden and the relief efforts shows that there tends to be at least four concise *ecological regimes*: prosperous countries, which have an average level of ecological burden, but pronounced environmental consciousness, which is reflected by strong relief efforts, for example, Austria as well as the social-democratic countries Sweden and Norway.

Brazil belongs to the countries with an above-average level of ecological burden, but also above-average relief efforts. Latvia is the well-balanced combination in between, since the level of ecological burden is lower than in Austria and the relief efforts are higher than in Brazil. That is why Latvia is at the forefront of all considered 43 countries in the overall index of ecological sustainability.

The economically liberal countries USA, Canada and Australia are prosperous and have a very high level of ecological burden, at the same time the relief efforts rank below average – this is the most unfavourable combination. Russia is only slightly different, since with less prosperity it also has a slightly lower level of ecological burden, but the relief efforts are also even lower than in the economically liberal countries. Finally, there are countries with below average

prosperity and level of ecological burden, but in which the ecological consciousness also ranks below average. For this China is a relevant example because this observation per capita has to be weighted by the population which in China is by far the highest. That is why every change in China would have a high impact on the overall state of ecological sustainability.

On the development of CO2 emissions

In the countries with the lowest CO2 emissions per capita – that is, in the emerging countries India and Brazil – these emissions increase from 2006 to 2013, in India from 1,02 to 1,49 and in Brazil from 1,67 to 2,26. An upward adjustment is of course undesirable. And the populous countries of India and Brazil carry weight. China, which also preponderates, is on place 21 (of 43) and has worsened from 4,49 to 6,60 in similar relation like India. The city-state of Luxembourg with the highest emissions per capita has improved from 2006 to 2013 by about 25%. The economically liberal countries USA, Australia and Canada, which carry more weight, have reduced their emissions from an unfavourably high level by about 5 to 10%. Although Germany has reduced its emissions from 2006 to 2013 by about 5%, it currently only reaches place 29 (of 43 countries). Altogether the CO2 emissions have been reduced in the OECD from 2006 to 2013 by about 10 %.

On the development of the waste pollution

India has by far the lowest waste pollution, there is no information on its development. In China the waste pollution increased (according to OECD) from 92 kg per capita in 2000 to 116 in 2009, so it ranks on place 2. In Brazil the waste pollution fell from 336 in 2000 to 295 in 2012, thus reaching place 3. At the very end we find Canada and the USA. In the US the waste pollution has decreased from 783 kg in 2000 to 725 in 2012. Canada, which produces the most waste, does not report any time series. Germany currently ranks on place 34 (of 42). In Germany the waste pollution decreased (according to Eurostat) from 642 kg in 2000 to 582 in 2007, but then increased again to 617 in 2013. In the EU27, the average waste pollution dropped from 523 kg per capita in 2000 to 481 in 2013, since the reduction is a political goal. In the OECD as a whole, the waste pollution decreased from 560 in 2000 to 522 in 2013. So there is a general trend to reduce waste pollution. Germany is no example of best practice.

On the development of the use of nuclear energy

France uses the risk technology of nuclear power by far the most. While this is historically understandable, it is nevertheless not reasonable. France reduced the nuclear share of electricity production from 78,0 % in 2002 a little to 76,9 % in 2014. Slovakia, ahead of France on the second to last place, reduced the nuclear share from 65,4 % in 2002 to 56,8 % in 2014. Hungary on the other hand, which

is on the third place from bottom, has increased the nuclear share from 36,1 % in 2002 to 53,6 % in 2014. Germany has reduced the nuclear share from 29,9 % in 2002 to 15,8 % in 2014, and ranks on place 26. Japan has reduced the nuclear share from 34,3 % in 2002 after the nuclear disaster in 2011 to 0 % in 2014, though at the moment it is unclear whether the current government is running up the nuclear capacity again. After all, 20 of the countries considered renounce entirely the risk technology nuclear power.

The nuclear disaster in Japan in March 2011 resulted only in Japan and Germany in a significant decline of nuclear energy. In Germany in the late 1990s a gradual phasing out of nuclear energy had been decided by the red-green coalition. In 2009 this decision was withdrawn by the CDU/CSU-FDP coalition and the run durations were extended. Prior to the elections in Baden-Württemberg in autumn 2011 after the nuclear disaster in Japan the CDU/CSU was threatened by severe losses of voters in favour of the Greens. The chancellor Angela Merkel changed the campaign by promising to shut down all 17 nuclear power plants in Germany by the year 2022. The increase in votes of the Greens at the expense of the CDU/CSU was not stopped nevertheless.

On the development of energy efficiency

The first aspect of the relief efforts is the issue of efficiency. The GDP of a country shall be produced with the least possible expenditure of energy. According to the World Bank the ratio of GDP per primary energy consumption is the biggest and best in Malta, Switzerland and Ireland. Malta has improved the value from 12,63 in 2006 to 17,68 in 2012. Switzerland increased the value from 14,59 in 2006 to 16,65 in 2013. Ireland increased the value from 14,41 in 2006 to 15,33 in 2013. Russia on the other hand applies its abundant energy least efficiently. Russia increased the value only slightly from 4,19 in 2006 to 4,41 in 2013. This means that Russia currently needs about four times as much primary energy per unit of GDP as Malta. Germany reaches place 14 (of 43 countries), the value of energy efficiency was improved from 9,36 in 2006 to 11,07 in 2013.

On the development of the share of renewable energy

Norway, which by far leads in renewable energies, has increased the share of renewables in gross final consumption (according to Eurostat 2015) from 58,6 % in 2004 to 69,2 % in 2013. Sweden increased this share from 38,3 % in 2004 to 52,6 % in 2013, and thus ranks on place 2. Brazil stagnated with its share of renewable energy (according to OECD 2015 for "energy supply") between 42,3 % in 2004 and 42,7 % in 2011. These three countries are at the forefront of the 43 countries considered. On the other hand, in Russia and South Korea

renewable energy is hardly used. Germany has risen the share of renewables in gross final consumption (according to Eurostat 2015) from 5,8 % in 2004 to 13,8 % in 2013 – Norway has more than five times the German share and Sweden about four times – and thus ranks on place 24 (of 43 countries). The EU28 has increased this share from 8,3 % in 2004 to 15,0 % in 2013, this being a relatively continuous course.

On the development of the share of organic agriculture

Austria has increased the proportion of organic agriculture (according to FiBL 2016) from 16,7 % in 2005 to 19,4 % in 2014 and thus clearly ranges at the top. In Austria the ecological cultivation is supported by an environmental program in the agricultural sector. The greater range of organic products also meets a growing demand. Estonia has increased this share from 7,2 % in 2005 to 16,5 % in 2014 and ranks on place 2, followed by Sweden, which has improved this share from 7,0 % in 2004 to 16,4 % in 2014 , On the other hand, the BRICS countries South Africa (about 0 %), Russia (0,1 %), Brazil (0,3 %), China (0,4 %) and India (0,4 %) currently have a very low awareness regarding ecological sustainability in agriculture. Germany has increased the proportion of organic agriculture from 4,7 % in 2005 to 6,3 % in 2014 and thus ranks on place 14 (of 43 countries).

6.4 Social equality: Income (in)equality as well as poverty in education and income in the comparison of countries and welfare regimes

Social equality as prerequisite for civil rights and as a socially desirable goal

The formal rights of citizens, which characterise democratic societies, cannot be used by all citizens to the same extent in reality; the realisation of civil and political rights is subject to conditions and capabilities. This applies even more when a positive concept of freedom is claimed. If the concept of freedom does not only mean the absence of coercion, but also includes the capacity of being able to do what one has decided voluntarily. The conditions of civil liberties and rights include personal capabilities as well as financial resources. Workers who are every day completely absorbed by the struggle for survival no longer have time to participate as active citizens in politics and community. Without resources political and civil rights have no “real” value; they remain purely formal. Without the social rights, which guarantee a basic material supply, a civil society, that offers opportunities for participation for all, cannot be made possible.

In order to guarantee the factual liberties of all citizens permanently, according to John Rawls (2003) a society must have institutions that steadily ensure fair conditions for the operations of the actors. For this it is necessary to adjust the distribution of valuable resources time and time again. If the empirical

distribution structure is not adequately regulated and adjusted, the first just social process would spontaneously increasingly slip into the unjust, no matter how free and fair the individual interactions may seem. In an unregulated free market system oligopolistic accumulations would profit, which would lead to stabilisation of unjustified inequalities and restrictions of fair chances.

Nancy Fraser (2003), too, defends a conception of justice that values equality and equal opportunities. A desirable distribution of material goods and wealth shall provide the material conditions to every actor to enable them to participate as an equal in social interaction. For that an exact uniform distribution of material goods is not needed, however, the inequality must not become so great that it prevents the chance of equal participation in social interactions for some citizens.

Selection of indicators

Poverty means that either the material conditions or the personal qualifications are missing to really take advantage of certain fundamental freedoms of society. Therefore, the right not to have to live in poverty becomes a fundamental right in affluent societies. The rate of poverty indicates the share of the population, which does not have the material conditions necessary to effectively make use of the liberty rights of a society. In general, persons were defined as poor when they lived in households that had less than 50 percent of the median income. With this indicator one does not measure *absolute* poverty, but the *relative* disadvantage in comparison to the median income. Since the EU by now works with the 60 %-threshold (risk of poverty), it is also used here. Another relevant indicator is the Gini coefficient, which measures the concentration of income. This coefficient indicates how unequally income is distributed in a population. The lower the Gini coefficient, the more egalitarian is the distribution of income; the higher the coefficient, the more the income is concentrated in the hands of few people.⁶ The coefficient is regularly used for international comparisons.

However, the use of individual liberties is equally linked to capabilities, i. e. primarily to education. In order to measure educational poverty, in turn, two indicators are applied. By the share of early school leavers one understands the proportion among the 18- to 24-year-old people who have no or only a low educational certificate⁷ and who actually do not attend a training at any kind of

⁶ A Gini index with the value of 0 expresses that every citizen and every household has exactly the same income (maximum equality); a Gini index with the value of 100 expresses that the total income is possessed by one single person or one single household (maximum inequality, see Holtmann 2009, p. 68 f.).

⁷ All certificates up to ISCED 3c level are counted as low educational attainment.

school. Because of their low formal educational attainment these young adults thus begin their careers with unfavourable conditions. The second indicator does not refer to educational certificates, but to competences that are acquired in the school system. As part of the PISA studies, international comparative data on the performance of education systems were obtained in very good quality. The target population for the PISA studies are the 15-year-old pupils of a country. The scale used here from PISA 2015 represents the reading competence, understood as the ability to understand written texts, to use and to reflect on them in order to achieve one's goals, to develop one's knowledge and potential and to participate in society (see Prenzel et al. 2004: 20). The indicator describes the percentage of 15-year-old pupils in a country that can solve even the simplest PISA tasks only with difficulties. Since this low reading performance does not fulfil the requirements of a knowledge society, these young people were defined as "risk readers" by the PISA authors.⁸

Social equality in country comparison

The comparison of countries shows that in educational poverty as well as in income poverty and inequality there is a high degree of dispersion among the countries considered.

With a small amount of 3-5 % early school leavers, the post-socialist countries Croatia and Slovenia together with Switzerland rank at the top. (The low certificate poverty is to be qualified in the case of Croatia and Switzerland, since in these countries one finds ca. 20 % pupils with poverty in reading performance in terms of PISA.) Germany with 10,1 % has already around twice as high a proportion of early school leavers, so Germany ranks on place 16 of 31 countries. In the Southern European countries Portugal, Italy, Malta and Spain as well as in the post-socialist countries Bulgaria and Romania the proportion of early school leavers ranges from 13 % to 20 % and finally in Turkey at 36 %.

The share of pupils with poor literacy ("risk readers" in the sense of PISA) is the lowest in 2015 on the average in the productivist welfare regime. In the two productivist countries Japan (with 12,9 %) and South Korea (with 13,7 %), the share of "risk readers" is comparatively low. The economically liberal countries Ireland (1st place) and Canada (3rd place) as well as Estonia (2nd place) and the social democratic Finland (4th place) are even more successful in limiting the risk of poor literacy. In Germany, there is a higher proportion with low reading competences (16,2 %), which places Germany in 11th place (from 40 countries). Germany, however, reduced this share from 22,6 % in 2000 by 6,4 percentage points. Germany has reacted relatively successfully to the PISA evaluations of 2000, especially with improvements in the support of disadvantaged pupils.

⁸ The reading performance can be divided into five levels of competency. The competency level 5 represents a high level of expertise in dealing with texts and level 1 describes only elementary reading skills. All those pupils, who reached at most proficiency level 1, were defined as "risk group".

Romania and Bulgaria as well as Turkey have about 40 % “risk readers”. Behind one finds only Brazil with about 50 % pupils with poor literacy.

If one measures the educational poverty by an equally weighted index of certificate and competence poverty, the productivist countries Japan and South Korea as well as Canada and Ireland rank at the top. Turkey and Brazil range by far at the end. Germany with place 19 among 40 countries belongs to the midfield.

The relative (income) poverty is defined as the percentage of the population which has an income below 50 % of the median income. The EU by now works with the 60 %-threshold (risk of poverty), so it is used here, too. The lowest risk of poverty (with 10-13 %) is to be found in the post-socialist countries the Czech Republic and Slovakia, in the social-democratic countries Norway, Denmark and Finland as well as in the Netherlands. Germany ranks with 16,7 % on place 18 (of 39 countries). The highest degree of relative poverty can be found in the post-socialist countries Serbia (25,4 %) and Romania (25,3 %), in the economically liberal USA (24,2 %) as well as in Turkey (23.7 %).

To study income inequality the Gini coefficient is well suited (1 = maximum concentration, 0 = minimum concentration). The most egalitarian are the social democratic countries Norway (.235), Sweden (.254) and Finland (.256), the post-socialist countries Slovenia (.250), Czech Republic (.251) and Slovakia (.261) as well as the conservative countries Belgium (.259) and the Netherlands (.262). Considering the inequality of income distribution, Germany ranks on place 18 of 43 countries with a Gini coefficient of .307. Among the developed countries the economically liberal USA is the country with the greatest income inequality (.401). The same degree of inequality is to be found in post-socialist Russia (.396). The “Communist” China exhibits even greater income inequality (.410), in particular because of the large urban-rural differences. Turkey ranges even behind (.428). The most extreme inequality can be found in the emerging nations Brazil (.550) and South Africa (.700).

If one forms a sub-index for equality of participation at income out of the standardised poverty rate and the standardised Gini coefficient, the social democratic countries Norway, Finland, Denmark and Sweden, the Netherlands, as well as the post-socialist countries Czech Republic, Slovakia and Slovenia rank at the top. Germany with place 18 among 43 countries belongs to the upper midfield. The inequality of participation at income is the largest in China, in the post-socialist countries Russia, Romania and Serbia, in the economically liberal USA and in Turkey, as well as finally in Brazil and South Africa at the very end.

In the overall index of equality of participation in education and income, the social democratic countries Norway, Finland and Denmark as well as the post-socialist countries Czech Republic and Slovenia are at the forefront. With the

18th place among 43 countries, Germany is in the upper midfield. The greatest inequality of participation in education and income is to be found in Turkey as well as particularly in the emerging markets of Brazil and South Africa.

Educational poverty versus income poverty

The relationship between educational and income poverty (indicators: “risk readers” versus (income) poverty) yields a two-dimensional view, in which the countries’ specific profiles are clearly visible: the social democratic countries Norway, Finland and Denmark show both low educational poverty and low income poverty.

The productivist countries South Korea and Japan are emphatically fighting educational poverty, but they are more likely to transfer the responsibility for income poverty to the individuals and the families. The economically liberal countries Canada, USA, Australia and New Zealand also tend in this direction. Catholic Malta, on the other hand, is not very successful in limiting educational poverty, but protects the population more from income poverty since the Socialist phase. The economic latecomers Romania and Bulgaria cannot protect their populations sufficiently either from educational poverty or from income poverty.

Investments in education for precaution as well as spending by the welfare state in the case of risk events pay off: investments in education limit the number of risk readers (partial proof: $r = -0,29$; $S = 0,07$) and favour low income poverty ($r = -0,52$; $S = 0,00$) and a good result in the overall equality of participation ($r = 0,32$; $S = 0,04$).

Expenditures of the welfare state in the case of risk events reduce income poverty ($r = -0,46$, $S = 0,00$), reduce income inequality ($r = -0,49$; $S = 0,00$) and contribute to the overall equality of participation ($r = 0,44$; $S = 0,00$).

On the development of the share of early school leavers

In the EU27 the share of early school leavers (aged 18 to 24) declined continuously from 17,6 % in 2000 via 15,8 % in 2005 to 11,0 % in 2015, according to Eurostat 2016. It is a strength of the post-socialist countries to leave behind only few with a low educational certificate. The new EU member Croatia (since July 2013 as extension to the EU28) reduced its share of early school leavers from 5,1 % in 2005 to 2,8 % in 2015 and thus ranks at the top. Slovenia as the second best has a share of 5,0 % in 2015. However, the PISA results show a more critical picture because, according to the competence measurements, Croatia with 20 % has a remarkable amount of risk readers. The Czech Republic has 22 % risk readers, although only 6 % have a low school leaving certificate.

However, in some countries of Southern Europe the problems are even greater. In Malta, the share of early school leavers was lowered from 38,9 % in 2005 to

still 19,8 % in 2015. In Spain the share of early school leavers was reduced from 30,8 % in 2005 to still 20,0 % in 2015. Finally, in Turkey this share decreased from 48,8 % in 2006 to still very high 38,3 % in 2015. So especially in Southern Europe there is a great need for action with regard to the empowerment of young people.

Germany also improved, but at a less favourable level from 13,5 % in 2005 to 10,1 % in 2015 (place 20 of 40 countries).

On the development of the share of “risk readers”

Of the post-socialist countries, which have a particularly low level of certificate poverty, Croatia, Lithuania, the Czech Republic and especially Slovakia have 20 % or more risk readers in 2015, according to PISA, which relativises the successes in limiting certificate poverty.

With 13,3 % the productivist welfare regime has the lowest mean share of risk readers. However, this share has worsened in Japan (from 9,8 % in 2012 to 12,9 % in 2015) as well as in South Korea (from 7,6 % in 2012 to 13,7 % in 2015). As a single economically liberal countries Canada (slightly improved from 10,9 % in 2012 to 10,7 % in 2015) and Ireland (slightly worsened from 9,6 % to 10,2 %) rank ahead on places 3 and 1. The social democratic welfare regime as a whole is on second place in the share of risk readers, somewhat before the economically liberal welfare regime. Finland improved slightly from 11,3 % in 2012 to 11,1 % in 2015 and ranks on fourth place.

Brazil ranks at the very end with 51 % risk readers in 2012 and 2015. But also the socio-economic latecomers Bulgaria and Romania perform very poorly with about 40 % risk readers.

Germany has improved compared to the below-average result in 2000 and ranks above the OECD average in 2012 and 2015, due to the increased support for disadvantaged pupils: the share of risk readers fell from 22,6 % in 2000 to 22,3 % in 2003, 20,0 % in 2006 and 18,5 % in 2009 to 14,5 % in 2012 and slightly increased to 16,2 % in 2015 (place 11 of 40 countries).

On the development of relative (income) poverty

According to Eurostat 2016 (SILC) the EU27 has initially improved in the share of people at risk of poverty, that is with less than 60 % of the national median income, from 16,4 % in 2005 to 16,3 % in 2009, but after the financial crisis the risk of poverty has increased again to 17,2 % in 2014.

Although in the Czech Republic the risk of poverty, after a decline from 10,4 % in 2005 to 8,6 % in 2009, rose again to 9,7 % in 2014, it reached the best value

from all countries considered. Norway, where the risk of poverty was finally reduced from 11,4 % in 2005 to 10,9 % in 2014, ranks on the second place.

In Germany, the risk of poverty has risen steadily since 2005, namely from 12,2 % in 2005 to 16,7 % in 2014, which is no good development.

According to the OECD 2016, in the economically liberal USA the risk of poverty, after 23,8 % in 2006, ranges at 24,2 % in 2014, which is the highest poverty rate in the developed countries.

On the development of income inequality

In the EU27, income inequality (measured by the concentration coefficient of Gini) has remained roughly constant from 2005 to 2011, with a value of 30,9 % in 2014 (see Eurostat 2016, SILC).

Norway has reduced the income inequality from 28,2 % (Gini) to 23,5 %, and is now at the top. Even though Slovenia and the Czech Republic have deteriorated somewhat in recent years, they exhibit, together with Norway, the lowest income inequality.

Germany initially improved in income inequality from 30,4 % in 2007 to 28,3 % in 2012, but since then income inequality has risen again to 30,7 % in 2014 (see Eurostat 2016, SILC).

According to OECD 2016, income inequality in the United States increased to 40,1 % in 2013. In Russia income inequality is similar in size, with 39,6 %. About 2010, income inequality in China ranges at 41,0 % and finally in the countries with the greatest income inequality at 55,0 % in Brazil and at 70,0 % in South Africa.

On the development of income poverty and educational poverty altogether

The share of risk readers (as an indicator of educational poverty) remained relatively constant in the OECD average from 2000 to 2015 at around 20 %. Germany has improved continuously from an unfavourable level (22,6 %), particularly by supporting disadvantaged pupils, and with 16,2 % is now performing better than the OECD average (according to PISA 2015).

On the other hand, the share of (relative) income poverty in the EU27 rose from 16,4 % in 2005 to 17,2 % in 2014. In Germany, the (relative) poverty rate rose from 12,2 % in 2005 to 16,7 % in 2014 (see Eurostat 2016, SILC), which is not a good development.

7. The womenfriendliness of countries and welfare regimes in an empirical comparison

Appreciation of peculiarities: womenfriendliness as desirable societal goal

Compared to men, women face disadvantages in their life practice; they are affected as a group by social inequality. Social inequality refers to the systematic unequal distribution of valuable resources. Social inequality between the sexes can be reflected in the underrepresented of women compared to men on universities, in parliaments or in management positions or when receiving a lower income. Ultimately, those numbers reflect hierarchical gender relations; women have less economic independence and lower life chances.

Since a few years women have been acquiring, on average, higher levels of education than men in many countries. If one would strive for the target of strict equality, one would dislike the high ratios of women graduating from university, which in many countries range considerably over 50 %. But, as long as women are still significantly disadvantaged in many other areas of society, woman friendliness appears to us as the appropriate socially desirable goal. Therefore, high shares of women in tertiary education are evaluated positively in terms of womenfriendliness.

The mechanisms that lead to discrimination of women are often not easy to identify. Often the labelling of gender roles is accompanied by very subtle and covert forms of discrimination. The following factors are viewed as main barriers to greater success of women: the pronounced responsibility of women for children and family as well as the related less distinctive professional orientation, gender-structured labour markets with typical "women's jobs" as well as patriarchal structures in companies. There are also cultural stereotypes that associate the male gender more than the feminine gender with attributes beneficial to careers (strong leadership, rational, self-conscious, etc.).

In the following, by womenfriendliness we understand the special promotion of women in welfare regimes, in particular the alignment of their conditions of access to resources that are generally estimated as valuable. The prevention of discrimination in a society is considered as a goal, the realisation of which modern societies should strive for. Therefore, different countries and welfare regimes are compared with respect to the extent in which they realise an anti-discrimination and women-friendly society.

Selection of indicators

The degree of social discrimination against women can be assessed on several dimensions; the most important dimensions seem to be their participation in

political decision-making, their access to higher education and their participation in the labour market and wages.

Access to high social and political offices is recognised as an important step towards more equality between the sexes. Through those offices decision-making power is gained, and the potential to shape social structures. In order to measure the representation of the sexes in political offices, the share of women in the national parliaments is considered (lower or single house).

In modern societies the educational system has a status assigning function. Social positions, social ascents and descents as well as occupation and career depend relatively closely on the educational level of a person. One indicator of the educational participation of women is the share of female students in the tertiary education (ISCED 6-7) according to UNESCO. If the shares of female students are particularly high, this will be evaluated positively in terms of womenfriendliness.

Better educational qualifications of women did not lead to improving their chances in the labour market to the same degree. So there are still gender-specific labour markets, women are more often than men employed below their level of education and they are also paid less. To measure the integration into the labour market, we consider the ratio of the employment rate of women relative to that of men. So high ratio values correspond to women-friendly labour markets.

The income is a relatively good indicator to measure the living standards of people. A lower income of women implies less economic independence. As an indicator of income inequality between the sexes the average annual income of women in relation to that of men was chosen.

To get a comprehensive value, which reflects the extent of discrimination against women in all four dimensions, the four indicators have been standardised and their average value is calculated as overall index for womenfriendliness. This total value thus represents all four aspects with equal weight.

Relations between the indicators

In countries where women are better represented in the parliaments, the labour markets are more open to women. Where women participate more effectively in the educational system, they also have a greater access to employment and the pay gap is smaller. In countries where women participate better at paid work, there is also a lower pay gap of women.

Comparison between the countries

The social-democratic countries Sweden, Finland, Norway and Denmark as well as the conservative countries Belgium and the Netherlands, but also South Africa achieve the best values with shares of women in parliament of 37 % to

44 %. The women-friendly welfare regime of Scandinavia reaches the best representation of women in parliament of all welfare regimes. India, Hungary, Brazil and finally Japan range at the very end; in these countries about ten men stand against one woman in the parliament. In Germany, the proportion of women is 36,5 %, so that Germany reaches place 10 among the 43 countries considered.

In 36 of 42 countries considered the enrollment of women in tertiary institutions is now higher than that of men. In the social-democratic countries Sweden and Norway as well as in the post-socialist countries Slovenia, Slovakia and Poland women outweigh the men most strongly. These two welfare regimes also on average perform the best in the educational participation of women. On the other hand, in tertiary education women participate the least in South Korea and Japan as well as India at the very end. Germany ranks behind Switzerland and ahead of Turkey at the fifth last place out of 42 countries.

In contrast to the educational participation, women are still worse off than men in the labour market, which is illustrated by the activity rates. Relatively the highest female participation is to be found in the social-democratic countries Norway, Sweden, Denmark and Finland as well as in the economically liberal countries Canada and New Zealand. Concerning the employment rate of women the social-democratic welfare regime of Scandinavia ranks by far at the top. On the other hand, the female employment rate in India is only about 34 % of that of men, in Turkey about 41 % and in Malta 57 %. In Germany the female employment rate is about 81 % of the employment rate of men, so that Germany is on place 20 of the 43 countries considered.

The average income yields a similar picture. While the average income of women in the social democratic countries Denmark, Sweden and Norway is 103 %, 79 % and 78 % of that of men, in Catholic Malta it is only 42 %, in the Islamic influenced Turkey only 39 % and in Hindu dominated India only 24 %. In addition to the countries of the social-democratic welfare regime, which ranks by far at the top, Australia and Slovenia perform well, too. Germany reaches place 19 in the gender equality of income.

The overall ranking, composed of the four indicators with the same weight, is led by the four social-democratic countries Denmark, Sweden, Norway and Finland as well as Slovenia and Australia. The strongest disadvantage for women exists in the East Asian countries Japan and South Korea as well as in Turkey and particularly in India. Concerning womenfriendliness Germany ranks in midfield; it is due to the relatively high percentage of women in parliament that the German overall value is not less favourable than place 24 among the 43 countries considered. Comparing the four dimensions of participation, it stands out that in the more traditional societies the participation of women in the

political sphere is particularly low, with shares of approximately 10 % in the parliaments.

On the development of womenfriendliness

On the development of the share of women in parliament

Concerning the participation of women in parliament, the social-democratic countries Sweden and Finland rank continuously at the top. In 2006 the share of women in parliament was 47,3 % in Sweden and slightly declined to 43,6 % by 2015 (see World Bank 2016). In Finland the proportion of women increased from 38,0 % in 2006 to 41,5 % in 2015. The social-democratic welfare regimes clearly rank at the top of all welfare regimes, followed by the conservative welfare regime.

In Germany the proportion of women in parliament has increased from 31,6 % in 2006 to 36,5 % by 2015, so that Germany reaches place 10 out of the 43 countries.

In Confucian Japan at the very end the proportion of women in parliament stagnated from 9,4 % in 2006 to 9,5 % in 2015. The machismo of Brazil is reflected in the proportion of women in parliament, which, after 8,8 % in 2006, is 9,9 % in 2015. In Hungary the proportion of women declined from 10,4 % in 2006 to 10,1 % in 2015. Concerning gender equality India is another problematic case, the proportion of women in parliament has increased only slightly from 8,3 % in 2006 to 12,0 % in 2015. That is, eight men in parliament stand against one woman. Even in the USA the share of women has risen only from 16,3 % in 2006 to 19,4 % in 2015. That is, in the USA five men in parliament stand against one woman. While women in educational institutions on average catch on and overtake already, this development is obviously on delay in politics. So it is still justified to consider womenfriendliness as a socially desirable goal.

On the development of the share of women in tertiary education

Concerning the participation of women in tertiary education (ISCED 6-7) the social-democratic countries Sweden and Norway perform the best. In Sweden the share of women among the students (according to Unesco 2015) increased slightly from 60,6 % in 2006 to 61,0 % in 2013, which is the top of all 43 countries considered. In Norway the share of women among students rose slightly from 60,1 % in 2006 to 61,4 % in 2013. Similarly well is the performance of the post-socialist countries Slovenia, Slovakia and Poland in tertiary education.

The lowest share of women in tertiary education is to be found in Turkey, Japan and South Korea as well as, at the very end, in India. In Turkey the share of women among students has slightly increased from 43,1 % in 2006 to 45,6 % in

2013. In Japan the share of women among students has increased a little from 41,1 % in 2006 to 42,8 % in 2012. In South Korea the share of women among students has slightly increased from 37,1 % in 2006 to 40,1 % in 2013. In India the share of women among students has increased slightly from 38,7 % in 2001 to 40,0 % in 2010. However, India and South Korea still rank at the very end.

In Germany the share of women among students stagnates with 47,74 % in 2006 and 47,67 % in 2013. From the viewpoint of womenfriendliness – because women still form an overall disadvantaged group – in Germany the share of women in tertiary education ranks only on place 38 among 42 countries, so it belongs to the worst five countries.

On the development of the ratio of female to male employment rates

The social-democratic countries Norway, Sweden, Denmark and Finland rank at the top concerning the female employment quotient (see World Bank 2016). In Norway women's employment ratio increased from 85,8 % in 2006 to 89,3 % for 2014. That is, the female employment rate is 89,3 % of the male employment rate. In Sweden women's employment ratio rose from 87,1 % in 2006 to 88,7 % in 2014. In Denmark the ratio increased from 85,5 % in 2006 to 88,5 % in 2014. And in Finland female employment ratio grew from 86,8 % in 2006 to 87,0 % in 2014.

In India, women's employment ratio dropped from 42,4 % in 2006 to 33,8 % in 2014, so that India ranks at the very end. In Turkey women's employment ratio increased from 33,9 % in 2006 to 41,4 % in 2014, so that Turkey ranges on second to last place of the 43 countries considered.

In Germany female employment ratio increased from 77,2 % in 2006 to 80,9 % in 2014. That is, the female employment rate is currently about 80 % of the male employment rate. Germany thus ranks on place 20 of 43 countries, therefore in the midfield.

On the development of gender equality of income

According to the World Gender Gap Report 2014, the social-democratic countries Denmark, Sweden and Norway as well as Australia and Slovenia have the lowest gender pay gaps. In Denmark, Sweden and Norway the pay gap decreased slightly from 2006 to 2014 according to Eurostat. Slovenia is even more successful at the reduction of the pay gap, according to Eurostat. In Australia the pay gap remains rather constant from 2000 to 2013, according to the OECD.

In South Korea, which has a very high pay gap, this gap decreased only slightly from 2000 to 2014, according to the OECD. (For Turkey and India, which also

have a high pay gap, there are no time series by which one might analyse the development.)

On the whole, in the EU27 on average there is a slight drop in the pay gap from 2006 to 2014, according to Eurostat. This also holds true for Germany, according to Eurostat.

Conclusion

In the participation of women in parliament, Germany performs relatively well with place 10 among 43 countries. Concerning the employment ratio in Germany with place 20 out of 43 countries ranks in the midfield. In gender income equality, Germany reaches place 19. But concerning the share of women among students, it ranks only on place 38 of the 42 countries considered. On the overall index of womenfriendliness Germany reaches place 24 out of the 43 countries under consideration. That is, Germany ranges in the international average.

8. Migrant-friendliness as well as the social integration of the whole population

Because of the growing importance of migration, it is examined how successful the 43 countries considered are in the recognition and anti-discrimination of migrants (see chapter 9.1). In order to be able to compare the quality of life in the countries and welfare regimes considered, we use the amount of the social integration of the entire population (see chapter 9.2) as a performance criterion by means of integration into paid employment (“having”) and into the support networks (“loving”) as well as into participation in civil society (“being”).

8.1 Appreciation of peculiarities: friendliness towards migrants in different countries and welfare regimes

Appreciation of peculiarities: friendliness towards migrants as a socially desirable goal

Not only the prevention of discrimination against migrants is a general objective of liberal societies, but also – formulated positively – the economic, social and political integration of people with immigrant backgrounds. This shall be achieved by granting equal rights and equal participation opportunities, for example in the education system and on the labour market. In fact, however, in many societies, there still are obstacles and barriers preventing adequate participation of migrants in public and political life and depriving this group of people of rights and resources. For this reason we can speak also of social discrimination: a person can be a victim of discrimination because of their individual peculiarities, but especially because they are recognisable as a member of a particular social group. Victims of discrimination must have

characteristics that make them distinguishable, e. g. certain physical features such as skin colour or language. Through these perceptible differences, they become the addressees of discriminating acts, disadvantages and prejudices. The effects of such systematic discrimination can be statistically described, e. g. as the under-representation of migrants in professional management positions or in higher education. It should be undisputed that all forms of discrimination are a violation of equality and freedom rights, as laid down in the constitutions of modern democracies.

As the US-American racism research (e. g. Knowles and Prewitt 1969) showed, deprivation in one area of society spills over to other areas: the poorly educated immigrant finds on average only poorly paid work, living in ghettoised neighbourhoods in poor health conditions and passes this low social status on to his children, in the form of bad start conditions. The causes of the deprivation of migrants can be hidden in institutional structures and routines or can result from hidden or openly shown xenophobic attitudes of the majority society. Sometimes causes of a lack of integration can also be found among the migrants themselves, e. g. in the form of lack of language skills. The public discussion moves in the tension between demands for a complete cultural assimilation and claims for the appreciation of different cultural traditions and peculiarities. In the following, countries and welfare regimes now are compared with regard to what extent, firstly, they let migrants in and, secondly, they let admitted migrants participate in society.

From 2015 on there was a strong inflow of refugees. In 2015 nearly 1,3 million asylum seekers came to Europe according to OECD 2016. Because of the conflicts about 25 % of the applicants came from Syria and about 16 % came from Afghanistan.

Germany registered 440 000 asylum applications in 2015 and more than one million pre-registrations. Sweden received most of the asylum applications in relation to its population (1,6 %).

Selection of indicators

The following international comparison tries to exhibit the extent of societal discrimination against migrants by means of selected indicators.

The extent of the migrant-friendliness shall be considered in two dimensions: openness towards migration (taking in migrants) and the participation of the migrants. The degree of openness of a society for migration will be measured by two indicators: the share of migrants in the total population and the rate of naturalisation. The share of migrants alone is certainly not a measure of the quality of integration, however, for the openness of a society. Of course it is

more difficult to integrate a large number of migrants, it is therefore appropriate to examine the quality of integration in a country also against the background of the quantity of migration into this country.

With respect to the participation of the migrants we investigate, whether a society provides participation of the migrants in important areas. This will be measured here on the basis of the participation of the migrants in the employment and in the education system. The integration into the labour market is determined by the ratio of the unemployment rate of foreign-born and the unemployment rate of people born in the country. A value less than 1 indicates that the migrants even do better on the labour market. A value as of 2, on the other hand, would mean that the unemployment rate of migrants is twice as high as the unemployment rate of people born in the country.

The measurement of the integration into the education systems is based on the data from the OECD, which has been collected as part of the Programme of International Student Assessment (PISA). A migrant background is attributed to students in the PISA studies, when they migrated together with their foreign-born parents or when they are domestically born children of two foreign-born parents. As indicator for the educational integration, the mean difference of reading performance between migrant children and native children from PISA 2015 will be considered. Here, the two group-means on the reading performance scale are compared directly. The indicator shows not only the actual performance differences, but refers implicitly to future inequalities, since educational competences shape the political, economic, social and cultural opportunities for participation. The educational competences – as basic preconditions for the participation in the information society, for lifelong learning and for individual self-realisation – are crucial resources for success in life.

Friendliness towards migrants in country comparison

The classic immigrant countries Australia, New Zealand and Canada as well as the relatively small countries Switzerland and especially Luxembourg have the largest share of migrants in the total population. For a small country regional mobility is more likely to lead to migration than in a larger country. Nevertheless, it is a merit to include migrants, since, of course, the question of integration arises. In all five countries, the share of migrants is more than 20 % of the population, according to UN 2016. Countries with a very low proportion of migrants are China, where only one in every thousand is born abroad, as well as India and Brazil with less than 0,5 % of migrants. In the post-socialist countries Romania, Bulgaria and Poland there is a share of migrants of only about 1 % and in the productivist countries Japan and South Korea only about 2 %, which is also comparatively very low. In Germany the share of migrants (according to UN 2016) is 14,9 % of the population, which means that Germany now ranks on place 11 out of 43 countries.

The generosity of naturalisations is another indicator of the openness of societies for migration. Societies like Australia and New Zealand do not think in the categories of citizenship, so there is only information about foreign-born vs. native-born population. Of the classical immigrant countries with high proportions of migrants, Canada (where more than 20 % of the population are migrants) is the most open to grant citizenship (per foreign population). Sweden has strongly improved in terms of openness in recent years, from a country with a low population of migrants to a society with a slightly above-average reception of migrants (about 15 % of the population). In the process of naturalisation of applicants (or here because of the availability of the data per foreign population), Sweden by now belongs to the top (2nd place). Poland and Hungary exhibit also a lot of naturalisation, but they do not want to admit refugees. While ca. 6 % of the concerned group (foreign-population) is naturalised in Canada and Sweden, these are only about 0,7 % in the Baltic States and Austria, and only about 0,4 % in Slovakia and Japan. According to OECD 2016, in Germany about 1,4 % of the concerned group get the citizenship, so Germany ranks on place 22 out of 34 countries.

If one forms out of the two individual indicators an index of the society's openness for migrants, the following results are obtained: the classic immigration countries Australia, Canada and New Zealand as well as the relatively small countries of Luxembourg and Switzerland rank at the top with regard to openness for migrants. Sweden has caught up with this top group in the last decade. Russia admits many returnees from the former Soviet Union, which here is not considered as genuine naturalisation. The least openness for migrants is to be found in China, India and Brazil, in the productivist countries Japan and South Korea as well as in the post-socialist countries Slovakia, Lithuania, Czech Republic and Bulgaria. Germany ranks on place 22 out of 43 countries.

In the classical immigration countries Australia, New Zealand and the USA the learning processes in the context of the integration of migrants have been developing continuously for a long time, and their well-designed immigration policies – also according to local needs – lead to the fact that the unemployment rates of foreign-born and native-born largely coincide (see OECD 2016). The conservative and social democratic countries are particularly bad at integrating migrants into the labour market. In the social democratic countries Norway and Sweden the unemployment rates of foreign-born are three times higher than those for native-born, in Denmark and Finland they are about twice as high. In the conservative countries Belgium, Switzerland and Austria the unemployment rates of the foreign-born are more than twice as high as those of the native-born. In Germany, the ratio of unemployment rates from foreign-born to native-born is 1,87. Thus Germany ranges on place 24 out of 33 countries.

The classical immigration countries Australia (about 28% migrants), Canada (about 22% migrants) and New Zealand (about 23% migrants) belong to the top with regard to the reading competence of pupils with a migration background (PISA: both parents are migrants). This also applies to Ireland and Malta. In Hungary, pupils with a migration background perform also relatively well relative to the other pupils. However, in Hungary there are only about 5% migrants.

As a weakness of the social-democratic countries Finland, Sweden and Denmark emerges that young people with an immigration background are not yet sufficiently integrated in the education system in the culturally relatively homogenous societies of Scandinavia. The conservative countries of Austria, Belgium, France and Switzerland, which all have hierarchical education systems, also perform poorly in the reading competence of pupils with a migration background. With place 33 among 37 countries Japan ranges even behind.

With place 27 among 36 countries, Germany belongs only to the last third, but Germany has more strongly improved since PISA 2000 than the OECD average.

From the two individual indicators a subindex of the equality of participation can be built. The economically liberal countries Australia, Canada and New Zealand are at the forefront. At the end of the ranking one finds the four Scandinavian countries, which are only beginning to develop an immigration tradition, as well as the conservative countries Belgium, Austria and Switzerland. Germany also belongs to the last third with place 27 among 37 countries.

If the two standardized subindices of openness for and participation of migrants are combined into an overall index, this gives an overview of how well individual countries succeed in admitting and integrating migrants. In this comparison, the economically liberal, English-speaking countries Australia, Canada and New Zealand reach the top positions. These countries are classical immigration countries, which have already learned to deal with and integrate migrants for a long time and have corresponding experiences. With place 28 among 43 countries, Germany can still learn a lot from the classical immigration countries with regard to the openness for migrants and the participation of the migrants admitted. Brazil, China and India, as well as Japan, occupy the last places in migrant-friendliness, since they hardly admit migrants. The countries, that admit few migrants, in general also provide little information, so the data base is weak.

Model with distinction of openness towards migrants and participation of the migrants: migration regimes

The traditional migration countries Australia (about 28 % migrants), Canada (about 22 % migrants) and New Zealand (about 23 % migrants), which have already for a long time continuously developed the learning processes around migration, also perform well in the participation of the migrants in the educational system and on the labour market.

The social-democratic countries of Scandinavia, which are especially successful in the other socially desirable aims, were traditionally ethnically and culturally relatively homogeneous and have not yet developed enough experiences with migrants. Finland and Denmark admit few migrants and the admitted migrants are not doing well on the labour market and in the educational system. However, Sweden has been struggling for a number of years to improve its legal framework and has already admitted more migrants, so that the admission of migrants by now stands above the international average. However, the participation of the migrants in the labour market and in the educational system remains relatively poor.

In small countries such as Luxembourg and Switzerland, regional mobility leads more easily to migration than in large countries. Accordingly, Luxembourg and Switzerland admit a relatively large proportion of migrants. But in these two conservative countries the relative participation of migrants in the educational system and in the labour market lie below the international average.

Germany is somewhat stronger in the admission of migrants than in the participation of the migrants, but it ranges in both dimensions – that is, the openness towards and the relative participation of the migrants – below the international average.

On the development of the share of migrants

In the countries, which rank at the top, the share of migrants (measured by the percentage of foreign-born according to OECD 2016) has risen continuously: in the small countries Luxembourg from 35,0 % in 2004 to 45,3 % in 2014 and in Switzerland from 23,5 % in 2004 to 28,8 % in 2014. In the classical immigration countries Australia from 23,8 % in 2004 to 28,1 % in 2014, in New Zealand from 19,5 % in 2004 to 23,3 % in 2014 and in Canada from 18,4 % in 2004 to 20,1 % in 2014.

On the other hand, there are virtually no migrants in the post-socialist countries Romania, Poland and Bulgaria as well as in the East Asian countries Japan and South Korea (from 0,1 % to a maximum of 2,9 % of the population).

Germany performs well in the reception of migrants with 14,9 % migrants

(place 11 of 43 according to UN 2016) after the comprehensive reception of refugees in 2015, but less well with regard to the other three indicators.

On the development of naturalisations

Canada and Sweden are the countries which simultaneously admit many migrants and have relatively many naturalisations per concerned group. In Canada (migrant share 20,7 %), the rate of naturalisation (according to OECD 2016) was maintained at a comparatively high level of 11,5 % between 2004 and 2011, but the level then was lowered to 5,9 % in 2012 up to 2014. In Sweden (migrant share 14,3 %), the rate of naturalisation increased from 6,1 % in 2004 to 10,7 % in 2006 and, after a fall to 5,3 % in 2009, finally to 6,3 % in 2014. In this combination Canada and Sweden perform the best.

On the other hand, Slovakia, the Baltic countries with their Russian minorities as well as Japan and even Austria rarely admit naturalisations (at most 0,8 %).

In Germany, the number of naturalisations in relation to the foreign population is 1,4 %, according to OECD 2016. Thus, Germany ranks on place 22 among the 34 countries considered. In Germany, the rate of naturalisation remained relatively constant from 2004 to 2014, whereas in Austria it declined sharply from 5,5 % in 2004 to 0,7 % in 2014.

On the development of the unemployment of migrants

Among the countries, which admit many migrants, in the USA, Australia and New Zealand there are hardly any differences in the unemployment rate of foreign-born and native-born. In the USA, the ratio of the unemployment rate of the foreign-born to that of the native-born remained constant at 0,98 (2008 and 2012, respectively), i. e. was almost equal to 1, which means equal treatment. By 2015 the ratio in the USA even improved to 0,89. In Australia the ratio improved from 1,10 in 2008 to 1,01 in 2015. And in New Zealand, there was also a strong adjustment with a reduction of the ratio from 1,15 in 2008 to 1,00 in 2015.

On the other hand, the ratio in conservative Belgium deteriorated from 2,47 in 2008 to 2,86 in 2012, i. e. in the economic crisis the inequality increased, so that the unemployment rate of the foreign-born is almost three times that of the native-born. By 2015, the ratio in Belgium fell to 2,49, i. e. roughly to the initial level of 2008. In the social democratic countries Norway and Sweden, the inequality also increased in the crisis: in Norway, the ratio rose from 2,30 in 2008 to 2,52 in 2012. With the increase in migration, in Norway the quotient of the disadvantage of migrants increased again to 3,07. In Sweden, the ratio increased from 2,30 in 2008 to 2,48 in 2012. With the increase in migration, in Sweden the disadvantage of the foreign-born increased once again to 2,94 by 2015.

In Germany, the ratio of the unemployment rate of the foreign-born to that of the

native-born improved slightly from 1,84 in 2008 to 1,74 in 2012, according to OECD 2016. With the increase in migration the disadvantage of the migrants on the labour market in Germany rose to 1,87 by 2015, i. e. roughly to the level of 2008. Hence, the unemployment rate of the foreign-born is currently almost double the unemployment rate of the native-born. Therefore, Germany achieves only place 24 among 33 countries.

On the development of the difference in competencies

Of the countries, that admit many migrants, the classic immigrant countries Australia, Canada and New Zealand rank at the top with their small differences between native pupils and pupils with a migration background (at PISA: both parents are migrants) in reading competency according to PISA 2015. Canada even improved significantly between 2006 and 2015.

Particularly large differences in literacy are to be found in the social-democratic countries Finland and Sweden, where the participation of migrants is one of the weaknesses. Finland worsened by 24 points between 2006 and 2015 and Sweden by 14 points, while the OECD average improved by 8 points.

Germany improved from 2006 to 2015, the differences between pupils without and with migration background decreased by 19 points. The pupils without a migration background improved their reading competencies from 2006 to 2015 by 16 points, and the students with a migration background improved even more strongly by 35 points, by stronger support. Germany ranges on place 27 among 36 countries with regard to the differences in literacy between pupils with and without migration and thus belongs to the last third.

Conclusion

Regarding migrant-friendliness, I distinguish the openness towards the admission of migrants and the participation of the migrants. With regard to the openness to migration, Germany still ranks quite well with place 11 among 43 countries, but when it comes to naturalization, Germany ranges only on place 22 among 34 countries.

In terms of the difference between the unemployment rates of "native-born" and "foreign-born", Germany ranges on place 24 among 33 countries. Concerning the difference in the reading competences of pupils with and without a migration background, Germany lies on place 27 among 36 countries.

Overall, Germany with place 27 among 43 countries in the overall index of migrant-friendliness, can still learn from the classical immigration countries with regard to the openness for migration and the participation of migrants admitted.

8.2 The amount of social integration in different countries and welfare regimes

Social integration as a socially desirable goal

Between the actors in social systems there are various relations that are expressed in many different acts of communication and interaction. Actors who are strongly involved in these relationships and communication networks can be considered as socially integrated. Social integration then refers to the processes and mechanisms by which the various actors are involved in the social system. From a macro sociological perspective, from these countless individual interactions results the basis for social cohesion, social solidarity and stability of a society. – Emile Durkheim was one of the great theoreticians of social integration, according to his theory social integration protects against anomy.

Social integration itself can be described as a multidimensional phenomenon, in the terminology of Allardt (1993) one could distinguish between *having*, *loving*, and *being*. On the one hand, the actors can be integrated by the market into the society. By inclusion in the employment systems and the associated earnings members of the society are basically capable to participate in the consumer and leisure facilities (*having*). Secondly, social integration particularly takes place in the private or personal space, where each actor can find security and support in close kinship and friendship relations (*loving*). Thirdly, social integration also occurs in the civil society, particularly through voluntary associations such as civic associations, parties and unions. Ideally, these voluntary associations are open and inclusive, where actors with similar interests come together (*being*).

Social integration should indisputably be regarded as a socially desirable goal because of these positive individual and societal effects. For some time, however, in the discussion of social integration increasingly the problems are emphasised. By Ulrich Beck (1986) an erosion of social ties and ways of life of industrial society is stated. The lifestyles of society members who are mobile, flexible and interested in personal self-fulfilment can be increasingly determined by their own freedom of choice and decisions, according to Beck. Under these circumstances, social ties become more fragile because they lose their long-term nature. The integration benefits of civil society are in erosion, according to Robert Putnam (1995, 2001). Putnam recognises at least in the United States a loss of social cohesiveness and a decline of civic engagement, which can e. g. be seen in the decline of the number of club memberships or rarer contacts to friends or neighbours. Because of these presumed crisis tendencies concerning social cohesion of modern societies, it seems particularly relevant to analyse social integration achievements in the economic, personal and civic sphere in the countries compared.

Selection of indicators

The performance in social integration is measured by a total of seven indicators. Economic integration into the market society (*having*) is captured by the following two indicators. The employment rate is the proportion of working full- or part-time people of all persons of working age. The age range between 15 and 64 years is defined as economically capable age. The unemployment rate is the proportion of persons unemployed in relation to the total workforce. Persons count as unemployed if they do not exercise gainful employment, but are registered as seeking work. Both indicators show the degree of economic integration. The participation in the employment system is important because it determines the financial possibilities of leading a life and helps to recognition and reputation. At the same time, contacts and friendships arise beyond professional interactions. In summary, the sub-index of economic integration is formed out of the standardised employment rate and the standardised unemployment rate with equal weight, and then standardised itself.

Social integration in the narrower sense in the micro range of personal relationships is determined by the extent of personal support networks (*loving*). First, the European Quality of Life Survey (EQLS 2012) raised the proportion of respondents who can expect help in the case of depression, whether from family members, friends, neighbours, colleagues, etc. This is in our opinion an indicator of social integration in the narrow sense, namely, the integration in the field of personal relationships. As a second indicator it has been asked, which proportion of respondents in a country in case of problems has family members or friends, on whom they can count (Gallup). Since the data of Gallup fluctuate relatively strongly with the annual samples, we have robustified the latest data (2011-14) by averaging to achieve a more stable data base. Out of the two standardised indicators for the personal relationships of EQLS and Gallup the sub-index for personal integration is built with the same weight. The sub-index itself is in turn standardised.

The integration in the civil society and the participation in the formulation of socially important conditions (*being*) can be seen in the willingness of people to attend political events, to participate in socially important voluntary associations and to express their views against public officials. The participation in parties and unions are particularly important as these are prime opportunities to take part in shaping the social framework. As first indicator it was surveyed, participated as a high which proportion of respondents in a country attended in the last year a meeting of a trade union, of a political party or of a citizens' initiative (EQLS). As a second indicator it was asked which proportion of the population has contacted a public official or politician. On the one hand, in its global survey Gallup inquired which proportion of the population voiced their opinion to a public official in the past month. Since the data of Gallup fluctuates

relatively strongly with the annual samples, we robustify the latest figures (2011-13) by averaging to obtain a more stable data base. On the other hand, in the European survey EQLS the proportion of the population that contacted a politician or public official is recorded similarly. From the two surveys by Gallup and by EQLS the sub-index “contacting politicians” is formed out of the two standardised partial indicators with equal weight. This sub-index is in turn standardised. As a third indicator it was raised, which percentage of persons are members of a trade union (OECD). As a summary out of the three standardised indicators for a civil society with equal weight, the sub-index for the integration in the civil society is formed. The sub-index is in turn standardised.

Out of the three sub-indices for *having, loving, being* (Allardt 1993), an overall index is finally formed in which all three aspects – economic integration, personal integration and integration in the civil society – are incorporated with the same weight, i. e., a third each. The overall index is calculated as the arithmetic mean of the three standardised sub-indices and then in turn standardised.

Comparison of countries

In Switzerland, 80,2 % of people of working age (for comparison: 15-64) belong to the labour force (the currently unemployed are included herein). Almost as many are to be found in the social democratic countries Sweden (75,5 %) and Norway (74,8 %). These countries belong to the top group in realising the potential labour force. – On the other hand, in Serbia there are only 43 %, in South Africa only 44 % and in Turkey 50 %, in the traditional Southern European countries Greece (51 %), Italy (56 %) and Spain (58 %) we find less than 60 % of population of working age (see OECD 2016 and Eurostat 2016). – In Germany the employment rate rose from 65,8 % in 2001 to 74,0 % in 2015. Thus, Germany reaches place 7 of 43 countries, which exhausts well the employment potential.

The lowest unemployment across countries is achieved in Norway, Switzerland and South Korea; there is only about 3 % of the labour force unemployed. The highest unemployment rates according to the IMF in 2013 are to be found in Spain (27,0 %) and Greece (27,0 %), South Africa (25,7 %), Serbia (23,0 %) and Portugal (18,3 %). Unemployment thus is extremely high especially in the crisis countries of the South – particularly in Greece and Spain, but also in Portugal. In Germany the economic integration into the labour market has improved, according to the IMF 2013 from 11,2 % in 2005 via 7,6 % in 2008 to 5,7 % in 2013. Thus Germany ranks on place 9 of 42 countries.

The economic integration is by far best achieved in the affluent Switzerland and in the social democratic Norway. Meanwhile Germany, too, scores well with place 6. On the other hand, the South European crisis countries Greece and

Spain, the post-socialist countries Serbia and Croatia as well as South Africa range at the very end in the economic integration.

On the level of personal interaction in the tripartite coordinated Slovenia in 2012 it is most likely to receive support by family or friends when one is mildly depressed, which is expected by 98 % of respondents in Slovenia, according to EQLS. In addition to the other post-socialist country Poland the familistic Greece also performs well. – In the city-state of Luxembourg, according to the theory of Durkheim more anomy can be expected. According to the survey Luxembourg has also only weak support networks. The same applies to the other conservative countries France and the Netherlands as well as for Cyprus. – In Germany about 94 % expect support from family or friends in the case of a depressive state according to EQLS 2012. Consequently, Germany ranks on place 11 out of 27 countries.

Similarly, Gallup realises a regular survey in 140 countries, in which, inter alia, it is determined whether in case of problems one has relatives or friends, on whom one can count. Since the data of Gallup fluctuates relatively strongly with the annual samples we have robustified the latest data (2011-2014) by averaging. According to Gallup Ireland ranks at the top, because 97 % of respondents, according to their assessment count on the support of relatives or friends in the event of problems. – On the other hand, in India the support in case of problems is particularly low. Also in Croatia, Romania and in Turkey support in case of problems is weak. – In Germany 94% of respondents expect the support of relatives or friends in the case of problems according to Gallup. With place 9 Germany performs decently.

The personal integration through support networks is best achieved in tripartite coordinated Slovenia according to the sub-index, as well as in the Anglo-Saxon countries New Zealand and Australia, in Switzerland and in social democratic Norway. With place 11 Germany belongs to the first third. In India one can count by far the least on help in case of problems according to Gallup.

The participation in civil society is firstly partially characterised by the percentage of respondents who attended a meeting of a trade union, a political party or a citizens' initiative last year. In the social democratic countries Sweden and Denmark 20,4 % and 18,2 % participate in this sense in civil society, according to EQLS 2012, this means that the two countries clearly rank at the top. – On the other hand, in Hungary, which is in a political crisis, only about 2 % take part in such an activity. In Greece and Portugal, which are in deep economic crises, only about 3 % or about 4 % participate in such political activities. – In Germany 7,6 % of the respondents take part at least once in a political event (including community groups and trade unions). Thus, Germany ranks on place 13 out of 30 countries.

The civic participation can be secondly partially characterised by the percentage of respondents who in the past month voiced their opinion against a public official (see Gallup). Since these data from Gallup fluctuate relatively strongly with the annual samples we have robustified the actual data (2012-14) by averaging in order to achieve a more stable data base. This participation is especially strong in the social democratic countries Denmark (40 %), Sweden (30 %) and Norway (30 %) as well as in the conservative countries Austria (33 %) and Germany (31 %) according to Gallup. – This participation is least in China (6 %), Turkey (8 %) and in ten of the thirteen post-socialist countries. – In Germany currently about 31 % of respondents per month voice their opinion to a public official, according to Gallup. With place 3 Germany has improved and now belongs to the top group among the 43 countries considered.

In the European survey EQLS it is similarly asked how large a proportion of the population has contacted a politician or public official. According to this survey contacting a politician is most common in the social democratic countries Norway, Sweden and Denmark as well as in the conservative countries Luxembourg and Austria. In all twelve post-socialist countries of the survey this political participation is rather low. With place 9 in this political participation Germany now belongs to the upper midfield of the 31 countries of the survey.

If one calculates the sub-index “Contacting politicians” out of the partial indicators of Gallup and EQLS with the same weight, so especially the social democratic countries Norway, Denmark and Sweden as well as the conservative countries Luxembourg, Austria and Germany rank at the top. In all thirteen post-socialist countries this political participation ranges below the international average.

If one thirdly determines the civil society partially by the union membership, so the social democratic countries Finland (69,0 %), Sweden (67,3 %) and Denmark (66,8 %) rank at the top, according to the OECD. – The lowest union density on the other hand can be found in Estonia (5,7 %), Turkey (6,3 %), France (7,7 %), Lithuania (10,0 %) and South Korea (10,1 %). – In Germany there are 18,1 % union members, according to the OECD. Thus, Germany ranks on place 21 among 37 countries.

The integration in civil society according to the summarising sub-index is most developed in the social democratic countries Sweden, Denmark and Norway. With place 13 Germany belongs to the first third of the countries. The participation in civil society is particularly low in the majority of post-socialist countries, and especially in China, where on the one hand, the economic integration is well pronounced, but the participation of citizens is still very weakly developed.

If one now forms an overall index out of the standardised sub-indices with equal weight of the three dimensions of social integration – economic integration, personal integration and integration in the civil society – the social democratic

countries Norway, Denmark and Sweden achieve the best index values. In these social democratic countries in particular the participation in civil society is very well developed. Meanwhile, with place 6 Germany performs relatively well, too. At the end of the ranking one finds Greece, a country in crisis, and Serbia as well as at the very end India, which is only quantitatively the largest democracy.

On the development of the employment rates

There is a long-term trend to increasing employment rates, particularly because of rising female participation. In the OECD the overall employment rate rose from 65,5 % in 2000 to 66,6 % in 2008, fell during the crisis year 2009 back to 64,8 % and recovered to 65,8 % in 2014. The employment rate of women increased from 55,0 % in 2000 to 58,0 % in 2014, while the employment rate of men decreased from 76,1 % in 2000 to 73,3 % in 2014.

According to the data of the OECD the employment rate of the social democratic welfare regime ranks continuously at the top, whereat Sweden overtook Denmark in about 2014. The employment rate of the conservative welfare regime ranks stably behind on a high level, with Switzerland permanently at the forefront. The economically liberal welfare regime has a similarly high level of employment as the conservative, but was more affected by the economic crisis (this is especially true for Ireland), from which it has, however, recovered by now. The productivist welfare regime recorded a relatively continuous increase in the employment rate. The productivist welfare regime recorded a relatively continuous increase in the employment rate. The group of post-socialist countries has suffered an even sharper decline of employment in 2009/10, from which, however, it has recovered by now. In the familistic welfare regime the decline of the employment rate in the economic crises continues until 2013 and is recovering only slowly since then. This is especially true for Greece.

On the development of the unemployment rates

Of the economic crises resulting from the financial crises, the familistic welfare regime is the most affected, since economic growth has slowed down due to the weak competitiveness and unemployment has risen sharply. During the crisis, the competitiveness of Greece proved to be the weakest. But also Spain, Portugal, Italy and with a time delay Cyprus were hit hard by the economic crises (because of its involvement in Greek banks). In Portugal unemployment rose from 7,7 % in 2006 to 9,4 % in the crisis year of the global financial crisis in 2009, with the euro crisis unemployment rose to 16,2 % in 2013, but fell to 11,2 % by 2016. In Italy unemployment rose from 6,8 % in 2006 via 7,7 % in the crisis year 2009 to 12,6 % in 2014 because of the euro crisis and then

decreased to 11,5 % by 2016. Cyprus fell into the crisis only with the banking crisis in Greece because of its involvement in these banks. After low 4,5 % in 2006, unemployment reached its peak at 16,2 % in 2014, but fell to 13,0 % by 2016. In Spain, unemployment rose from 8,5 % in 2006 to 17,9 % in the crisis year 2009, reaching its peak at 26,1 % in 2013 with the euro crisis, and then declined slightly to 19,4 % in 2016. Greece proved as the weakest link in the Eurogroup in the challenges of the two financial crises because of its low competitiveness. Unemployment rose from 7,8 % in 2008 to 9,6 % in the crisis year 2009 and, with the euro crisis, to 27,5 % in 2013 and then declined slightly to 23,3 % in 2016. Malta, on the other hand, remained untroubled by the crises with the help of low real taxation, its unemployment rate fell from 6,8 % in 2006 to 4,8 % in 2016. The post-socialist welfare regime was hit as the second-strongest by the crisis, whereat the Baltic States with its credit-financed growth model crashed the hardest in the crisis year 2009, but from which they have recovered by now.

In Japan as the representative of the most successful welfare regime, the productivist one, the unemployment rate rose from 4,1 % in 2006 to 5,1 % in the crisis year 2009, but was reduced to about 3,2 % by 2016. – In Germany, the unemployment rate rose from 7,4 % in 2008 to only 7,7 % in the crisis year 2009, since the government intervened among others with short-time working regulations and economic stimulus packages. By October 2016 the unemployment rate had been reduced to low 4,3 %, according to the measurement of the IMF.

On the development of the social support networks according to EQLS

There is a general trend of declining support networks during the period of the world financial crisis and the subsequent economic crises. This also holds true for all welfare regimes.

If one feels a little depressed (so the indicator of social support networks), one can expect on average most likely support from one's networks in post-socialist countries (see the data of the EQLS for 2003, 2007 and 2011/12). While civic engagement is especially weak in post-socialist countries, the personal niches on the other hand, are rather well developed. Within the post-socialist group of countries Slovenia with its model of social partners always ranks at the top. On the other hand, the social support networks have further decreased in the economically liberal countries Estonia and Latvia during the crisis and are weakest in the context of post-socialist countries.

The familistic welfare regime with its extended families as potential support networks ranks on place 2, wherein Cyprus, however, significantly drops during the economic crisis.

The social democratic welfare regime ranks on place 3 in the strength of support networks, but has weakened significantly during the economic crisis.

Comparatively poorly developed are the support networks in the conservative welfare regime, even further weakening during the economic crisis. They are particularly weak in France and in the Netherlands according to the EQLS.

Similarly poorly developed as in the conservative welfare regimes are the support networks in the economically liberal countries UK and Ireland, where the social support networks weakened even further during the economic crisis.

On the development of social support networks according to Gallup

Also according to the data of Gallup the personal support decreases during the period of the world financial crisis and the economic crises. The data fluctuate, however, relatively strongly with the annual samples. If one robustifies the actual data (2011-14) by averaging, then the level and the course of personal support are more advantageous in the social democratic, the economically liberal and in the conservative welfare regime than in the familistic, in the post-socialist and in the productivist welfare regime. However, the data fluctuate with the annual samples.

On the development of the participation in political events

From 2003 to 2012 the participation in political events has generally declined, according to EQLS. In the social democratic welfare regime, which is at the forefront, participation in political events fell from 27 % to 19 %. With clear distance the conservative welfare regime follows, where the participation fell from 14 % to 9 %, then the economically liberal welfare regime with a decrease from 13 % to 8 %, the familistic welfare regime with a decrease from 14 % to 7 % and the post-socialist group with a decline from 8 % to 6 %. The challenges during the time of the world financial crisis have thus led to a decline in participation in political events.

On the development of contacting politicians

According to the data of Gallup contacting politicians is most pronounced and stable in time in the social democratic welfare regime where Denmark is always at the top. The course of the conservative welfare regime ranks behind, followed by the economically liberal welfare regime, wherein contacting politicians is particularly widespread in the United States. The familistic welfare regime is on place 4 in this form of political participation and has improved since 2006, which holds particularly true for Portugal and Spain. The productivist welfare regime has fallen behind the familistic one. The post-socialist group ranks at the end and stagnates in this form of political participation.

Also according to the EQLS surveys from 2003, 2007 and 2012 the social democratic welfare regime is always at the top considering contacting politicians, followed by the conservative and the economically liberal welfare regime. The familistic welfare regime and the post-socialist group range over time in each case at the end. The overall improvement in 2013 – together with the economic recovery – can only be seen in the more recent data of Gallup.

On the development of union membership

According to OECD 2016 union density has fallen in the OECD countries from 20,2 % in 2000 to 18,0 % in 2008, slightly increased in the year of crisis 2009 to 18,1 %, but fell back to 16,7 % in 2014. Hence there is rather a trend to declining participation in the trade unions, which was only temporarily interrupted during the crisis.

In the social democratic welfare regime union density declined from 67,0 % in 2006 to 63,8 % in 2014, according to OECD 2016. During this period Sweden fell behind Finland. In the conservative welfare regime union density decreased from the much lower level of 27,7 % in 2006 to 25,0 % in 2014. In the economically liberal welfare regime union density fell from 23,5 % in 2006 to 20,6 % in 2014, whereat in Ireland an increase could be observed during the financial crisis, which was more than offset by a following decline, though. In the familistic welfare regime an increase in union density occurred in Italy and Spain between 2006 and 2014, where during the crisis citizens strengthened their participation in the political process. In the post-socialist group of countries union density fell from 18,6 % in 2006 to 12,7 % in 2014. The decline was particularly marked in Slovenia, Hungary and Estonia, which had to cope with various crises.

Altogether, the participation in civil society is more pronounced in the social democratic countries and relatively low in the post-socialist countries and the productivist welfare regime.

9. Comparison of living conditions: The performance of the countries and welfare regimes

9.1 Performance profiles of the welfare regimes

Since targets such as growth (e.g. mountains of consumption) and ecological sustainability (e.g. garbage dumps) can conflict, the goals are presented in a star diagram, with the goals pointing outwards.⁹ For the recognition of peculiarities, friendliness towards women is chosen for the graphic, since the data base is more complete and better than for the friendliness towards migrants.

With regard to this conceptual figure, the *social-democratic welfare regime of Scandinavia* is currently almost everywhere at the outside in Figure 13-1. Seven of the nine criteria are on average best met by the social-democratic countries, so that achieving all these - partially conflicting - goals is quite possible. With the highest public and the second highest private expenditures for research and development, the social-democratic welfare regime ranks on top in terms of internet use, on 3rd place with regard to patents and altogether on second place in the overall index of innovation capacity. With regard to economic prosperity, the social-democratic welfare regime ranks by now in front of the economically liberal and the conservative welfare regime. The high level of prosperity has the downside of an increased ecologically stress level. But especially with regard to renewable energy and the relief efforts as a whole, the social-democratic welfare regime is so far ahead that it ranks also at the top in the overall index of ecological sustainability. That is, high prosperity and ecological sustainability are partly conflicting, but they are not incompatible. - The social-democratic welfare regime is the best choice for the provision of social security benefits in the case of risk and for prevention through education as well as for social protection altogether. Due to the highest total investments in precaution and aftercare, the social-democratic welfare regime achieves the lowest income poverty risk and the most egalitarian distribution of income as well as the leading place in the overall index for the equality of participation. Through these investments, the welfare regime also favors the highest satisfaction of the population with the freedom of choice and the best objective capability of the population for autonomy and thus also the first place in the objective and subjective autonomy as a whole. - The social-democratic welfare regime ranks at the top with regards to the proportion of women in parliament, the proportion of female students, the female employment rate and the female income ratio, as well as the overall index of friendliness towards women.

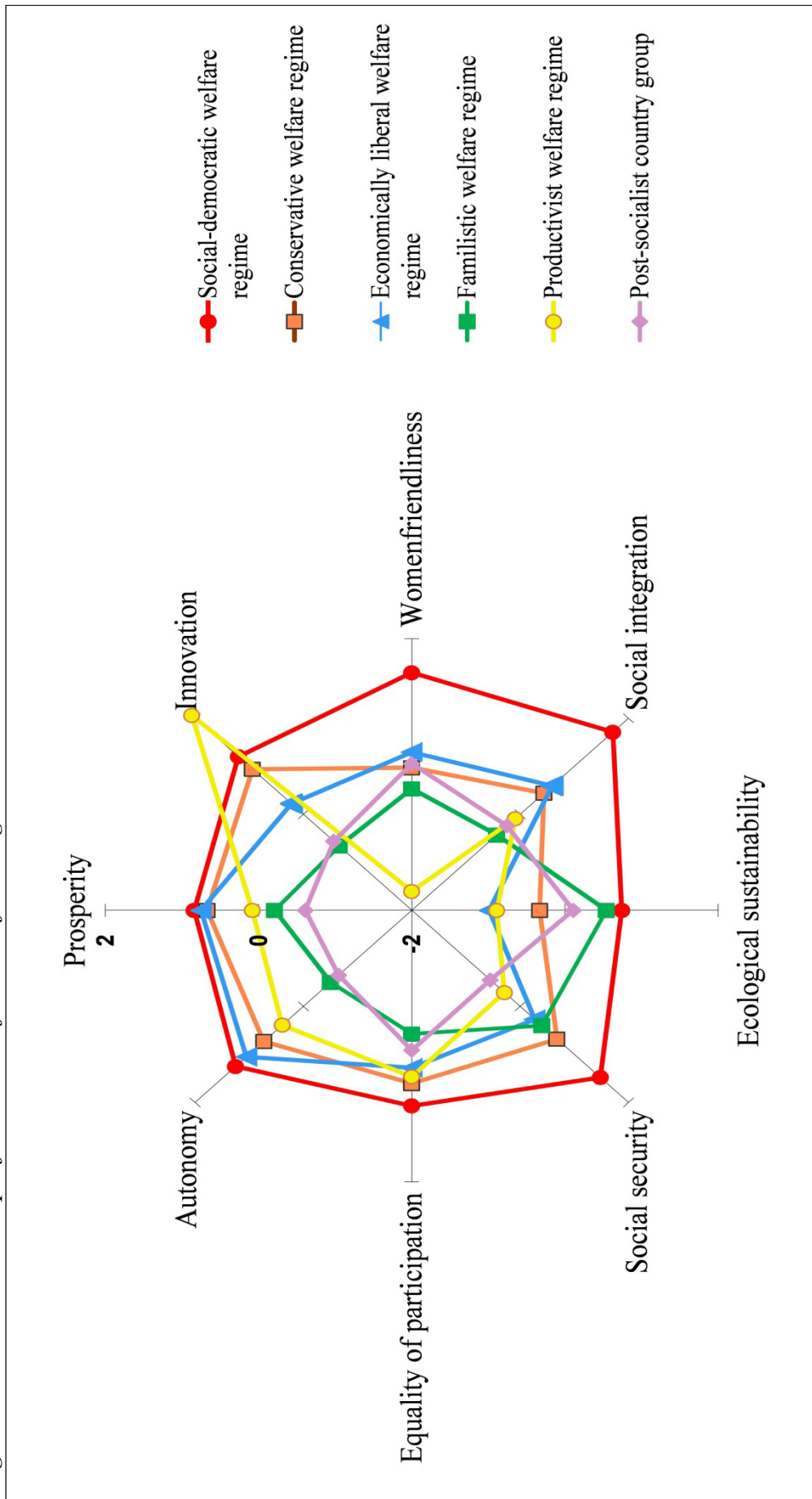
⁹ The indicators, subindices and indices are each standardized to make them more comparable. (Hence, the mean value is 0, the variance (or the standard deviation) respectively 1.) Negative means: below the average. Positive: above average. For all criteria, I also report the standardized versions so that size orders are measured independently of the topic in the same "step length".

With regard to personal integration and to integration in the civil society, as well as in the overall index of social inclusion, the social-democratic welfare regime always ranks at the top, although this is primarily the case for the indigenous population and less for migrants.

The socio-democratic welfare regime ranges at the end with regard to the participation of migrants in the educational system and in the labour market, and this is also the case for the overall index of friendliness towards migrants. This is a weak point of the social-democratic welfare regime, which was ethnically and culturally relatively homogeneous and has few experiences with migrants.

The *conservative welfare regime of continental Europe* ranks third among the welfare regimes in terms of innovation, and this also applies to the prosperity achieved (the city state of Luxembourg as an outlier is not taken into account). The social democratic, the economically liberal and the conservative welfare regime exhibit a similar level of prosperity, these are the three prosperous welfare regimes. As a downside to high prosperity, the conservative welfare regime ranges at the penultimate place in terms of ecological burden. With respect to relief efforts, however, it achieves the 3rd place and in the overall index of ecological sustainability the 4th place of the 6 welfare regimes. – While the conservative welfare regime is second to the social-democratic welfare regime in the aftercare expenditures of the welfare sector, it ranges only on third place in the preventive public and private educational expenditures. The 2nd place in social protection as a whole is the basis for the second place in the case of income poverty, of income inequality and in the overall index for equality of participation. In the case of objective capability for autonomy, the conservative welfare regime reaches the 4th place, and in the case of subjective autonomy the third place, the latter also applies to the overall index of autonomy. – Like the 4th place in the female income ratio, the conservative welfare regime also reaches the 4th place in the overall index of women-friendliness. In the case of integration in the civil society, the conservative welfare regime is second, and third in the overall index of social integration. However, social integration is more successful for the native population. In terms of openness to migration, the prosperous conservative welfare regime is still in the second place behind the economically liberal welfare regime, but it only ranks fourth in terms of the participation of migrants in the educational system and on the labour market. The latter also applies to the overall index of migrant-friendliness.

Figure 9-1: The overall performance of the welfare regimes



Model: Dieter Holtmann

While the *economically liberal Anglo-Saxon welfare regime* occupies 4th place in all indicators of innovation capacity and also in the overall index, it is a little behind the social-democratic, and roughly the same, with the conservative welfare regime in the 2nd place. This is particularly the case in the USA, which is transforming its world power status and its monetary policy into a high average prosperity. As a downside to high prosperity, the economic welfare regime has the highest environmental impact level and is also at the penultimate place in the relief efforts. Priority is given to prosperity and economic growth, neglecting environmental sustainability (last place in the overall index). While the economically liberal welfare regime occupies 4th place in all indicators of innovation capacity and also in the overall index, in the standard of living it ranks a little behind the social-democratic and a little before the conservative welfare regime on the 2nd place. This is particularly caused by the USA, which is transforming its world power status and its currency privilege into a high average prosperity. As a downside to high prosperity, the economically liberal welfare regime has the highest environmental burden and ranges also at the penultimate point with respect to the relief efforts. Priority is given to prosperity and economic growth, neglecting environmental sustainability (last place in the overall index). – While the economically liberal welfare regime is part of the lower half with respect to the expenditures of the welfare state, it reaches the second place behind the social-democratic welfare regime in terms of public and private educational expenditures. As a result, the economically liberal welfare regime is also on second place in terms of low educational poverty. On the other hand, the income poverty is the second highest and the inequality of the income distribution is the highest among all welfare regimes, since the state interferes as little as possible in the markets in accordance with the economically liberal philosophy. The second place in terms of investments in education pays off in the 2nd place for the objective capabilities on the basis of the educational system. According to Gallup (2016), the subjective satisfaction of the population with the freedom of choice ranks also on second place. In this way, the economically liberal welfare regime also reaches the second place in the overall index of subjective and objective autonomy, a good result on the basis of prosperity and educational investments. – Women's employment rate and women's income quotient of the economically liberal welfare regime rank each on the second place behind the social-democratic welfare regime, but the representation of women in parliament ranges only on the 4th place. Both in terms of openness to migrants as well as in the participation of migrants in the educational system and on the labour market, the economically liberal welfare regime ranks at the top, and the traditional immigrant countries also reach the first place with regard to the overall index of migrant-friendliness, since by learning processes and experiences they have developed the best way to deal with migrants. The economically liberal welfare regime is second in the employment rate and also in terms of personal integration, behind the social-

democratic welfare regime, and it is also on second place behind the social-democratic welfare regime with respect to the overall index of social integration.

The familistic welfare regime of Southern Europe ranges at the end in both public and private investments in research and development. This also applies to the dissemination of Internet use and to the overall index of innovation capacity. In the standard of living, this welfare regime ranges with the penultimate place somewhat better than Eastern Europe, as the tourism contributes to the prosperity of the Southern countries. With respect to the ecological burden by the CO₂-emissions and the nuclear energy risk technology, Southern Europe is the best. The relief efforts are on second place, so that the familistic welfare regime reaches the second place behind the social-democratic welfare regime with respect to the overall index of ecological sustainability. – In terms of public and private educational expenditures as precaution, the familistic welfare regime ranges fourth. In the expenditures of the welfare state, the familistic welfare regime ranks on the third place, although the expenditures are too much directed to the insiders of the labour market and to pensions. The familistic welfare regime also ranks 3rd with respect to the overall index of social security. The familistic welfare regime ranges 4th in terms of high income poverty and great inequality in the income distribution. In terms of "risk-readers" in the sense of PISA and with respect to educational poverty, the familistic welfare regime ranges at the very end, the educational system is very little successful. That is why the familistic welfare regime of Southern Europe ranges also at the end with respect to the overall index for the equality of participation. In terms of objective capability for autonomy (inter alia by reading competencies), Southern Europe ranges on penultimate place. The satisfaction with the freedom of choice is somewhat higher than in the post-socialist group of countries. In the overall index for objective and subjective autonomy, the familistic welfare regime ranges then also on the penultimate position, followed by the post-socialist

group of countries at the very end. – Due to the great influence of the Churches in Southern Europe, gender roles are still relatively traditional. In the women's employment rate and in the female income ratio as well as in the overall index of womenfriendliness, the familistic welfare regime ranges on the penultimate position, followed only by the productivist welfare regime of East Asia. In terms of openness to migration, the familistic welfare regime ranges on the 4th place, but on second place with regard to migrants' participation; and this also applies to the overall index of migrant-friendliness. The traditional countries in Southern Europe range at the end in terms of the employment rate; this also applies to the unemployment rate of the relatively less competitive countries of Southern Europe after the global financial crisis. In terms of integration in the civil society, with the fourth place the South is better off than in economic

integration, but the familistic welfare regime nevertheless ranks at the end with respect to the overall index of social integration.

Since the enterprises in the productivist welfare regime of East Asia invest comparatively by far the most in research and development, it ranks also at the top in the overall expenditures. Because of the productivist concept of economic advancement through competitiveness on the world market, the productivist welfare regime is also at the forefront of important patents aimed at safeguarding technological developments against its competitors. Hence, the productivist welfare regime is also at the forefront with respect to the overall index of innovation capacity (before the social-democratic welfare regime). But in prosperity it is still behind the three wealthy welfare regimes, the social-democratic, the economically liberal and the conservative. However, the growth rate is higher in the productivist welfare regime.

The two productivist countries already belong to the 18 countries with the highest prosperity. In terms of environmental burden, the productivist welfare regime ranges in the middle, because e. g. the amount of garbage is significantly lower than in the more prosperous economically liberal welfare regime. But in relief efforts the productivist welfare regime ranges even behind the economically liberal welfare regime at the very end, since the ecological sustainability has been neglected due to the one-sided focus on economic growth. – In the priorities between precaution and after care in social security, the productivist welfare regime places greater emphasis on public and private investments in education as a precautionary measure, but in the case of the expenditures of the welfare state it is by far on last place, since the protection in case of risk is left to the families. The performances with respect to the equality of participation in terms of education and income are corresponding.

While the productivist welfare regime is at the forefront in terms of few "risk-readers" in the sense of PISA and with little educational poverty, it ranges at the very end in terms of high income poverty, since the protection is left to the families. In the objective capability of the population to autonomy through the education system, the productivist welfare regime is at the forefront in terms of average reading competency as well as in the amount of top readers. This good result is, however, relativized by the subjective assessment of the population, whose satisfaction with the freedom of choice is only ranked fourth. In terms of objective and subjective autonomy as a whole, the productivist welfare regime is then on the fourth place behind the three prosperous welfare regimes. – The gender roles in the productivist welfare regime of East Asia are still very traditional, hence the proportion of women in the parliament as well as the proportion of female students, the female employment rate and the female income ratio range at the very end, which of course also applies to the overall index of womenfriendliness. Since the countries of the productivist welfare regime of East Asia are still strongly nationally oriented, there are only about

2 % migrants. Further information on the participation of migrants is not available in the usual surveys. According to this few information, the productivist welfare regime of East Asia ranges on the last place in terms of migrant- friendliness. According to the productivist welfare logic, integration into the labour market is comparatively best achieved in the productivist welfare regime. The employment rate ranges only on 4th place because of the traditional gender roles. In the case of personal integration and integration in the civil society, it ranges at the end. Because of the good economic integration, the productivist welfare regime ranges fourth with respect to the overall index of social integration, but it is largely the social integration of the natives, since there are only few migrants.

In private as well as in public investments in research and development, the post-socialist group of countries in Eastern Europe ranges in the penultimate position before the familistic welfare regime. This also applies to the dissemination of Internet use and to the overall index of innovation capacity. In the case of average prosperity, this country group ranges at the very end, with the Czech Republic and Slovenia already catching up to the midfield. On the other hand, this group of countries has a low level of garbage and the second lowest environmental burden. In the use of energy, e. g. the raw material rich Russia is little efficient. In the relief efforts altogether, the country group is on fourth place, hence it reaches only the third place in the overall index of ecological sustainability. – In the expenditures of the welfare state, the post-socialist group of countries ranges on the penultimate position, followed only by the productivist welfare regime of East Asia. In the case of public and private educational expenditures as precaution, this group of countries ranges even at the very end, and this also applies to the overall index of social security. Altogether, this group of countries has rather turned away from the model of governmental provision. In terms of the proportion of "risk-readers" as defined by PISA, this group of countries ranges on the penultimate position (before Southern Europe), and this also applies to total educational poverty. In terms of income poverty and in the inequality of the income distribution, this country group scores slightly better with the 3rd resp. 4th place, but this country group ranges on the penultimate position (before Southern Europe) with respect to the overall index of equality of participation. In terms of objective capability of the population to autonomy through the education system, the post-socialist group of countries ranges at the very end. This also applies to the satisfaction of the population with the freedom of choice as well as finally to the overall index of subjective and objective autonomy. – The post-socialist group of countries belongs to the top in terms of the share of female students, but in the representation of women in parliament it ranges only on the penultimate position (before East Asia). In the case of women's income quotient, this country group is

on third place, and this also applies to the overall index of womenfriendliness. Because of the relatively low prosperity, this group of countries exhibits only a small number of migrants, only East Asia has less migrants. But in the participation of the (few) migrants, this group of countries is on third place; this also applies to the overall index of migrant-friendliness. In economic integration, the post-socialist group of countries ranges on the penultimate position (before the economic crisis countries of the South). In terms of integration in the civil society, this group of countries ranges at the very end; and this also applies to the overall index of social integration. In the post-socialist societies, civil society has not yet developed long enough..

9.2 A system of societal monitoring of the wealth and welfare of nations

I think that the approach of welfare regimes, in which the logic of the production and distribution of welfare is examined, is particularly suited to explain the welfare of the nations in part. On the other hand, the individual countries, at the same time, show differences and independent profiles with respect to the socially desirable goals and the quality of the living conditions in the analyzed dimensions.

The best reform program would be to organize social development as a learning process. In expansion respectively systematization of the Human Development Report of the United Nations, which takes into account as many nations as possible, but is in part limited to relatively crude indicators, the comparison of the welfare of nations should be extended to such a broad list of socially desirable goals and quality criteria, as I have suggested here for a system of continuous societal observation, which should, of course, be further developed in a learning process itself.

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