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THE LEGITIMACY OF THE WELFARE STATE

RELIGION – GENDER – NEOLIBERALISM



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RELIGION AND THE WELFARE STATE UNDER NEOLIBERAL HEGEMONY

Tuomas Martikainen

I INTRODUCTION

Current social scientific research has a fairly uniform voice in its acknowledgement that economic forces have played an increasing role in culture, politics and society worldwide since the late 1970s and that the impact of economics has even amplified since the end of the Cold War. Keywords for this recognition vary, but they can be summarized under the headings of *globalization* and/or *neoliberalism*. Globalization refers “both to the compression of the world and the intensification of the consciousness of the world as a whole” (Robertson 1992: 8). Some globalization theorists link it closely with the global expansion of capitalism and neoliberalism (Held et al. 1999: 2–10). Neoliberalism can be defined as an ideology that prefers to apply market-based solutions to almost all social phenomena, and it also promotes a new social order to transform societies (Duménil and Lévy 2005: 9). Even though the exact nature and scope of both globalization and neoliberalism remain contested, it is self-evident that national societies around the globe have had to deal with these phenomena, and, as a consequence, have gone through processes of restructuring. Besides the impact of globalization and neoliberalism on social institutions and structures, it is noteworthy that at their heart is “a series of shifts in thinking and discourse among ordinary citizens and elites” (Hall and Lamont 2013: 3) implying a deeper cultural change in people’s preferences, values and world view than an institutional restructuring perspective allows us to see.

This chapter asks the following three questions: How have religions reacted to neoliberalism? Has neoliberalism altered the relationship between religions and the welfare state? What long-term consequences may changed welfare state–religion relations imply? While I acknowledge that the changes

due to globalization and neoliberalism are by necessity situated in a particular historical and social context (cf. *glocalisation*, Robertson 1995), I nevertheless maintain – and it is important to me to state this – that the national frame of reference, with its implicitly nationally path-dependent and methodologically nationalist reasoning, does not capture alone the transformation brought about by globalization and neoliberalism (cf. Wimmer and Glick-Schiller 2002; Kettunen and Pedersen 2011).

2 HOW HAVE RELIGIONS REACTED TO NEOLIBERALISM?

The impact of neoliberalism as such has not been a central theme in the study of contemporary religion. The only major exception seems to be the study of contemporary Islam in regions where neoliberal policies have been adopted by states, including Turkey (Atasoy 2009) and Indonesia (Rudnycky 2009). Nevertheless, the growing role of capitalism, markets and consumption has been raised to a central position by several established commentators, though often not from a neoliberal perspective.¹ For example, Bryan S. Turner argues in *Religion and Modern Society* (2011) that commodification (p. 292) and commercialization (p. 296) are central elements of contemporary religion, especially so among groups that attract upwardly mobile people and the middle class. Also Peter Beyer (2012: 122–124) argues from a Luhmannian perspective that religions are increasingly modelled as businesses today. (On different approaches to religion and economy, see Gauthier, Martikainen and Woodhead 2013: 264–269).

Irrespective of religion scholars' still emerging interest in neoliberalism, many religious organizations take an active stance on it. It is common to be critical of the neoliberalization of society, and religions claim to provide an alternative ethos to the perceived superficial, and at times unfair, new economic order. Historical churches and other traditional religions are often visible among the more critically minded on economic questions. For example, the Evangelical Lutheran Church of Finland voiced a vocal critique of economic restructuring during the late 1990s as it was seen to harm the poor.

¹ I will leave out the discussion of the so-called rational choice theory of religion, or religious economics. In my interpretation the religious economics approach has grown out of the economization of social science, and is in itself more a target for the study of the impact of neoliberalism on science (Gauthier, Woodhead and Martikainen 2013, 6–9).

Their report – *Towards the Common Good: Statement on the Future of the Welfare Society by the Bishops of the Evangelical Lutheran Church of Finland* (1999) – reads as follows:

“A weak point in neo-liberal thinking is the assumption that the freedom of all can continually increase. In reality, this is not the case. A market economy as such cannot prevent the freedom of some increasing at the expense of others. [...] Those who cannot benefit from the markets are unable to be free and active partners within the system. The increase of the well-being of an individual at the expense of others is in conflict with the moral foundation of society, with the Golden Rule. It is an expression of selfishness and greed in so far as it leads to the deterioration of the living conditions of others.”

The Finnish Church received hard critique from economists and others for its intervention into matters that were considered to be outside of its area of expertise (Markola 2011: 114). However, especially the religious left has long been critical of economic globalization and associated neoliberal policies, and been active in the alterglobalist movement (Burity 2013: 31–35). Often framed as the voice of the poor and of those who remain outside of consumer society, religious movements have played not just a minor but even an important role in providing help for those in need.

However, not all religions are critical of neoliberalism and consumerism; some have rather absorbed their key elements into their ethics and theologies. Many modern movements are comfortable with living in consumer societies, and Marion Maddox (2012: 153) among others argues that

“[g]rowth churches give their blessing to consumerist culture. They sacralise malls, ex-urban sprawl, car-dependency, single-mindedness, incessant marketing, branding. Their profane is the world of the non-successful, judged according to the marketing ideals of happy, suburban families and all-conquering entrepreneurs.”

A consumerist ethos is evident also in religious traditions beside Christianity, for instance among some moderate and conservative Muslim groups. Religious lifestyles are increasingly commoditized and, for example, whole new brands of *halal* products have recently become available (Sandıkcı and Ger 2007). As Ozlem Madi (2014: 154) writes on the reconsideration of theological principles on consumption among the Turkish Islamic bourgeoisie:

“In the new interpretation a Muslim has the right to consume whatever he/she needs as long as it does not violate any Islamic principles, since Muslims, as

those following God's precepts most closely, deserve the best of everything. In the new capitalist Islam the difference between need and luxury is eliminated and capitalist consumerism dictates luxury as need."

Prosperity theology focusing on an individual's success can, hence, be seen as a theological fruit of consumer society. Some of the quickly growing contemporary religious movements around the world seem to carry a promise of a better life and economic success, of which the megachurches that Maddox discusses are only one example. Mara Einstein, likewise, in her *Brands of Faith: Marketing Religion in a Commercial Age* (2008), shows how marketing and branding have become integral elements in the contemporary religious marketplace and thereby, at least to some extent, have modified religions' approach to and appreciation of consumer culture and (see also Usunier and Stolz 2014).

These academic interpretations of the impact of economic change on religious thought and practice provide alternative lenses to the previously more common view that commodification degrades the value of religion. Earlier it was a customary interpretation that commodification leads to a trivialization of religion and enhances secularization (cf. Bruce 1997; Carrette and King 2005), but as Madi (2014) and others have pointed out this does not need to be the case. The role of the market can be of great importance also among fundamentalist movements, in some cases even central to their growth.

This bipolar image of religions as either criticizing or praising a changing political economy is probably true regarding the communities' self-identification in relation to neoliberalism-based changes. However, I am tempted to argue that neoliberalism has brought about a deeper change that is far more difficult to pinpoint in simple dichotomies. Together with François Gauthier and Linda Woodhead I have suggested that many of the currently observed religious developments can be attributed to changes in the global political economy, whereby economic reasoning has penetrated deeply into various institutional and cultural realms through the influence of new techniques of management, privatization, outsourcing, forms of (network) governance, etc. These changes in political economy have been culturally magnified by the influence of a consumerist ethos, whereby values of freedom, choice and individualism have become central in many cultural milieus (Gauthier, Martikainen and Woodhead 2011, 2013; Gauthier and Martikainen 2013; Martikainen and Gauthier 2013).

3 HAS NEOLIBERALISM ALTERED THE RELATIONSHIP BETWEEN RELIGIONS AND THE WELFARE STATE?

In the classical welfare state regime model of Gøsta Esping-Andersen (1990: 26–29) religion, with the exception of political Catholicism, did not play a prominent role. In the liberal regime religion-based charities and other organizations could function as service providers, but were firmly placed in civil society. In the corporatist-statist regime religion, and in particular the Catholic Church, had a role as a semi-official service provider through its specialized branches. In the social democratic regime, religions were effectively pushed out of the picture. However, in reality in all of the regimes religious organizations did play at least some role in last resort social assistance through charity and other ecclesiastical organizations.

The historical relationship between the welfare state and the major Christian denominations has been under reconsideration during recent years. Kees van Kersbergen and Philip Manow provide a powerful argument in their co-edited *Religion, Class Coalitions and Welfare States* (2009) to reconsider the impact of Catholicism and of Lutheran and Calvinist/Reformed Protestantism in the making of welfare states; in their study Catholic ideas of welfare are mainly associated with the corporatist-statist, Lutheran theology with the social-democratic and Reformed/Calvinist ideas with the liberal regime. As Sigrun Kahl (2011) convincingly discusses with regard to the development of poor relief in her contribution to Kersbergen and Manow's book, these three main western European religious traditions have had significant continuity in national ideologies of welfare.

Anders Bäckström et al. have conducted a large, eight-country comparison of the role of churches in welfare provision in Europe (Bäckström et al. 2010, 2011). They note a continuing, and even increasing, role of churches in welfare provision that more or less follows Esping-Andersen's model, even though the local context naturally matters in the precise forms of service and delivery. In addition, they note a growing public visibility and perhaps even a new role in public service of the historical churches, and argue for the inclusion of faith-based services in studying contemporary forms of welfare. Moreover, Per Pettersson (2011) suggests that churches are increasingly following "the logic of service society" (p. 56). Also the literature on faith-based organizations has blossomed and notes a new recognition of religious service providers (Dinham 2009). However, the perspective of neoliberalism has not been widely used in analyzing the relationship between the welfare state and religion, with minor exceptions (e. g. Hackworth 2012, 2013; Martikainen 2012; Ashley and Sandefer 2013).

The institutional differentiation of religion and the welfare state is effective as long as the state's view of its role in welfare provision holds, but there seem to be fractures in this configuration. For example, Adam Dinham summarizes the public role of religion in the UK welfare sector in his book *Faiths, Public Policy and Civil Society* (2009) as follows:

"In policy terms there is an opening up to faiths of opportunities to be at the public table in service delivery, in community cohesion and resilience and in new forms of governance. Faiths are seen as 'repositories' of resources which can contribute in each of these areas."

Dinham thereby discusses a novel UK public policy that actively invites religious and other civil society organizations to participate in the provision of public welfare. He views this as a new development based originally on the Thatcher government's initiation of a mixed welfare regime, whereby the state reduced its role in direct service delivery via outsourcing and privatization, that has been extended under subsequent UK governments. (Dinham 2009: 124–128).

Another example is Finland. Over the last three decades Finnish public administration has undergone continuous restructuring which has both directly and indirectly affected how the welfare state is structured. According to Risto Heiskala (2006: 37) the neoliberal reimagining has taken place as follows: economic efficiency has replaced regional and social equality as the goal of governmental policies, and citizens are increasingly seen as customers. Governmental co-ordination has moved from hierarchical planning to market mechanisms, including network management and privatization. Previous homogenous cultural values and preferences – collectivism and national protectionism – have been replaced by heterogeneity, individualism, cultural openness and international competition. This implies a changing rationale in how the state sees itself and what its central tasks are. Research on the role of the church in welfare provision indicates some evidence for a rise in welfare related tasks over the same time period (Pessi et al. 2009: 226).

These and similar developments elsewhere indicate changing relations between the welfare state and religion. The key change for religion seems to be in the way states relate to civil society. Civil society refers to an area of free association, made up of manifold voluntary organizations, that is simultaneously a partner of and a watchdog over the state and a crucial element of democracy (Herbert 2009: 213). The religious component of civil society started to gain a new momentum in the 1990s alongside the growing role of

neoliberalism, and received recognition in research in José Casanova's widely-read *Public Religions in the Modern World* (1994). Much of the later research on religion and civil society has highlighted the importance of religions' contribution to societal well-being. For example, studies on religion and development have tended to emphasize the positive role of faith-based organizations in development (e. g. Clarke and Jennings 2008), as well as US-based studies on migrant religious organizations with regard to their significance to migrant integration (e. g. Foley and Hodge 2007).

Notwithstanding the positive role that religions may have on societal welfare, another question needs to be addressed: why have states gained a novel interest in civil society? Following Sinha, we can argue that due to the neoliberal reimagining of the state's role from that of a paternalistic carer to that of a manager, civil society organizations have new opportunities as partners of the state in delivering various kinds of services. However, this new opening is based on the reasoning that civil society organizations, including faith-based organizations, can legitimately compete over various funds earmarked for the delivery of public welfare services. These opportunities are often associated from the state's side with outsourcing and privatization maneuvers, as well as budget cuts that aim to reduce the costs of welfare services, and to make them more cost-effective (Sinha 2005: 163–165). This strategic change underlines an instrumentalization of civil society by the state, whereby contract-based project funding and associated management tools are used as control mechanisms.

In sum, the new opportunity structure for religions in welfare delivery has emerged from a neoliberal restructuring of the state in which religious organizations are framed as actors in civil society alongside other non-governmental organizations. This institutional setup aims to reduce the costs associated with welfare provision, as well as in some cases to wholly externalize some services to philanthropic organizations. Whereas the full implications of these shifts remain open for the time being, observations by Bäckström et al. (2010, 2011) indicate that in some cases religions are *de facto* more involved in welfare provision than before.

4 WHAT LONG-TERM CONSEQUENCES MAY CHANGED WELFARE STATE–RELIGION RELATIONS IMPLY?

Before addressing the question of what the neoliberalization of the state may imply in the long-term for religion, let us take a step back and see how religion itself has changed over the past decades. In the UK, for example, religion has become increasingly diverse, new religious actors have been established, churches' ties to the nation-state and the welfare project have loosened and the power of the clergy has diminished. Today's religious field is not only much more varied, but it has also become integrally bonded with the market, consumer capitalism and the proliferation of media. The changes look different depending on your vantage point. Compared with the 1950s when the church and the state were implementing a shared moral and political vision from above, it looks like decline. But from a perspective less concerned with state-religion relations than with developments on the ground, it looks like reconfiguration and renewal, albeit within a society in which secularism is now more firmly embedded (Woodhead 2012: 19).

Linda Woodhead's (2012) above analysis of religion in contemporary Britain suggests that whereas the "mutually-modelled" church–state nexus has loosened, a whole new array of religious actors have come into play. These for their part are designed more in accordance with criteria found in the market and the media. If these observations can also be applied to other national contexts, it appears that even though the post-war national welfare projects themselves were historically tied up with the national churches and have shaped their understanding of their own roles, confirming van Kersbergen and Manow's (2009) thesis, a new religiously diverse group of actors is ready to find niches to work in, also in regard to welfare provision.

We do not currently have a clear view of the extent of (public) welfare delivery by religious organizations, but at least anecdotal evidence would suggest that new types of faith-based organization have indeed taken on such roles in service provision as well as elsewhere in society. The historical churches too are continuing to pursue such activities, albeit in a new political economy that emphasizes competition and effectiveness. In this regard it remains empirically unclear to what extent the religious component is a factor in welfare state questions at large.

Moreover, the noted welfare state scholar Christopher Pierson (2006: 190–194) does not see an end to existing welfare state regimes as such, but rather a recalibration, including elements of a mixed economy of welfare provisions. If his diagnosis is correct, we may equally expect that there will ulti-

mately be relatively few changes in religious welfare provision either. However, it is an open question to what extent the increase in religious diversity may be a factor in this. Also the continuing financial crises of Europe, added to ongoing population aging and changing family structures, may provide additional concerns for particular types of welfare state. Pierson (2009: 229) notes that the Central European corporatist-statist model may be the least well equipped to meet them, due to its reliance on the family.

Still, religious questions and some religious actors have gained a presence in the world of welfare. In this regard, Adam Dinham (2009: 209–210) recognizes three specific challenges that arise out of the increasing role of religious organizations in welfare provision. The first is the public actors' unfamiliarity with religion, at least in its contemporary diversity, as well as their difficulties in understanding religious language. The second is the legitimacy of religious organizations in providing public service. In places when such a practice has been uncommon, it may lead to debates on who would be the most suitable, or even acceptable, service provider. Thirdly, the presence of religions brings forth new agendas and ways of understanding life that need further interaction and dialogue. Hence, an increasing public role for religion reveals some of the diversity that exists in society and makes it more visible to the rest of the population and to public administration.

Altogether, I would assess that the challenges are largest for the historical churches in Europe, but the same organizations also have the most resources (personnel, skills, funding, etc.) to recalibrate their activities in case of need. The largest opportunities, however, are among the new religious players, who are to start with much more comfort in the new political economy. Hence, unless some major political turn takes place – which is always possible – I would argue that shifts in the welfare state-religion axis will in the medium term remain rather small. Nevertheless, the economic changes that have already taken place have started to have an impact within religious organizations themselves that may also lead to new types of welfare agenda as time goes on. Even the religious organizations' intensifying competition with private companies in providing welfare services may prove crucial in speeding up the process of the religions' adaptation to consumer capitalism.

5 CONCLUSION

Even though globalization and neoliberalism are not the only great global processes currently active in the world (cf. climate change, population growth, Internet-based technologies), they are both central to understanding what is taking place among both welfare states and religions. In this chapter I have argued that the general neoliberalization of society has created new opportunities as well as threats to religious organizations.

Religions have adapted to neoliberalism in different ways. Some have resisted it and others are celebrating it, but all have in one way or another been affected by the changed political economy. The main change in the religion–welfare state nexus has been the instrumentalization of civil society for welfare provision. This has brought some religious organizations closer to the state, while many others have remained in the shadows. The long-term consequences of these changes have been deemed to be rather small from the viewpoint of the welfare state, but for some religious service providers the new economic parameters can also provide significant opportunities. The situation may be quite different in this respect elsewhere in the world, where the welfare state is less developed. There also the religions’ potential for change and growth appears to be larger. Especially new religious organizations that are born out of the globalized and neoliberalized situation may find significant benefits in the current age.

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