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# Confusion and divergence: Origins and meanings of the term 'welfare state' in Germany and Britain, 1840–1940

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## Abstract

It is often stated that there is no standard definition of a 'welfare state'. A survey of the standard textbooks supports this claim. It is also often the case that academic works on welfare state and social policy history earmark lines or even pages to discussing the origins of the term welfare state. However, these brief accounts are often wrong in the details and are missing important aspects. In our article we offer the first detailed study of the origin of the term 'welfare state' tracing it back to the mid-19th century Germany and following its diverse and changing definitions in the German and British context until the 1940s. The study adds decades to the conventional understanding of this history and offers a more nuanced understanding of the different definitions attributed to the term before its political breakthrough in the late 1940s. Projecting this post-war understanding backwards in time – what the literature generally does – is too simple and anachronistic. Both in Germany and Britain the dominating understandings differ from our present day understanding of the 'welfare state' as a social security system.

## Keywords

Britain, Germany, key concepts, social policy history, welfare state

## Introduction

In 1968, the grand old man of British social policy, Richard M. Titmuss noted that he was no more enamoured of the indefinable abstraction 'the Welfare State' than he had been some 20 years earlier when the term acquired international as well as national popularity. 'The consequences have not at all been intellectually stimulating', Titmuss concluded.

His pessimistic assessment has since been reiterated by social scientists on several occasions

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(Beland 2011; Veit-Wilson, 2000). But despite its ambiguity and fuzzy character 'welfare state' has become one of our most powerful political terms as well as a frequently used scholarly concept. As such, comparative studies of social policy confront the problem of conceptual 'stretching' (Collier and Mahon Jr, 1993; Sartori, 1984). The meanings and connotations of the term 'welfare state' show large variation over time and between countries.<sup>1</sup> This article discusses the origins of the term 'welfare state' in Germany and Britain. Even though historians and social scientists studying social policy history tend to argue that the term 'welfare state' has an 'uncertain paternity' (Glennester, 2000: 1), there is general agreement that the 'conceptual fathers' have to be found in these two countries. However, as noted in *The Dictionary of the History of Ideas* (Briggs, 1973), there exists no detailed study of the origins of the term 'welfare state'. Numerous books on the history of the British, German or European welfare states have variously ascribed the paternity of the term to German economists in the 1880s, the German chancellor von Popen in the early 1930s, or British intellectuals such as William Temple, Alfred Zimmern and Georg Schuster in the 1930s and 1940s. Yet these accounts all lack important aspects. First, there is confusion regarding earliest use. Our findings show that the term was used much earlier than conventionally stated in scholarly contributions. Second, we find divergence when it comes to meanings of the term 'welfare state'. It is often argued that there exists no standard definition of a 'welfare state', but most present academic works on the topic focus on social security and services provided by public agencies, as reflected in Asa Briggs' well known definition (Briggs, 1961). The problem arises when this contemporary understanding is automatically projected backwards in time. When this happens we arrive at a definition of the term that is both anachronistic and inaccurate.

We agree with Beland (2011) that we should focus on studying social policy language rather than individual concepts. However, in order to develop a more informed analysis of social policy language (in the political as well as academic world), we need to establish a broader understanding of how the term was understood and applied in different

historical and political contexts.<sup>2</sup> As observed by linguists (Lakoff and Johnson, 1980), conceptual historians (Skinner, 1989) and political scientists (Beland, 2011; Hastings, 1999) the terms, metaphors and concepts we live by are far from innocent. They are part and parcel as well as an outcome of political struggles.<sup>3</sup> Studying the history of terms and concept formation, therefore, is an important part of political analysis (Farr, 1989; Heywood, 2000; Sartori, 1984; Williams, 1976).

The aim of the article is twofold. Besides setting the historical record straight, we also attempt to elucidate a better understanding of the social policy key concept 'welfare state'. By discussing the use of the term 'welfare state' up to the 1940s we establish an understanding of the pre-political meanings (Leonhard, 2008) of the term. These pre-political meanings are important historical layers in the modern political use of the term (Skinner, 1989: 10). The British historian Noel Whiteside (2005) has argued that comparative analysis is 'plagued by problems of similar policies disguised by different terminology and different policies, agencies and instruments that possess almost similar labels. Words get in our way.' We find a large variation in the use and content of the label 'welfare state' between countries and over time. Consequently, we need to address how different historical experiences influence contemporary meanings of our key concepts. Put simply, studying the origin and the 'career' of the term offers a strategy for dealing with the conceptual stretching of the category 'welfare state'. It creates an analytical awareness of the potential discrepancies between the academic use of the term and its public and political uses.

Our research strategy is straightforward: What we are looking for are texts that explicitly use the term 'welfare state'.<sup>4</sup> We focus on the term and its appearance in different historical contexts, from its first occurrence in the 1840s until the 1940s, using electronic databases and applying the 'snowball method' (Andersen, 1997: 24–28), that is, tracing references from one source to the next. We focus on the most important 'rhetorical redescrptions' and 'ideological innovators' (Skinner, 1989), rather than tracing every single translation and repetition. We identify different meanings and uses regarding connotations and meanings attributed to the term

in three different historical contexts (see below). For analytical purposes, we differentiate between those meanings referring to the welfare state as a form of state (or governance) versus those that describe the functions or objectives of the state. Within both categories, we find positive as well as negative meanings ascribed to the term welfare state.

The article is divided into three sections. The first section discusses the early German use of the concept from the mid-1840s until 1900. Our findings show that the term was used 35 years earlier than normally referred to in scholarly contributions. In the second section, we investigate the German debates in the 20th century, particularly during the interwar period. Here the term 'welfare state' became associated with the heated debate on the Weimar constitution. It has frequently been argued that in interwar Germany, the term was used only in a pejorative way. Our findings show that this is not the case. In the third section, we focus on interwar Britain, where use of the term 'welfare state' was restricted to a small group of Oxford intellectuals. We study their use of the term from the late 1920s to the early 1940s in more detail than has been the case so far. It is shown that the Oxford social theorists developed a discourse quite different from the German pre-Weimar and Weimar usage as well as from the modern use of 'welfare state' as a synonym for social security.

### Early German uses of the term 'Wohlfahrtsstaat'

The term 'welfare state' has its origin in Germany and in this section we trace the term back in German history. The term 'Wohlfahrtsstaat' was used by a number of prominent German intellectuals from the 1840s and until 1910s. Moreover, even if it difficult to assess the diffusion from intellectuals to the broader political debate, thinkers such as Lorenz von Stein, Rudolf Gneist, Ferdinand Tönnies and Max Weber were all well known and highly influential in their own time. We will show that with the exception of the economist Adolph Wagner, the term 'welfare state' had quite a different meaning from its meaning today.

Heidenheimer (1983) and others have pointed towards interwar Germany and especially Chancellor von Popen's critical appraisal of the welfare arrangements of the Weimar republic (see below) as the original use of the term 'welfare state'. However, other scholars have found the concept used half a century earlier by state-friendly German economists. The German historian Gerhard A. Ritter (1991: 4, 77) refers to the German economist Adolph Wagner (1879: §168, 305) as the first one to use the term 'Wohlfahrtsstaat' (see also Conrad, 2005: 999). In fact Wagner had used the term 3 years earlier (1876: §168, 257):

And the state of progressive peoples, particularly the modern ones, increasingly ceases to be one-sidedly a state of law – in the sense of the most exclusive realization possible of the state objectives of law and power – and increasingly becomes a state of culture and welfare [Cultur- und Wohlfahrtsstaat], in the sense that its attainments with respect to the state objectives of culture and welfare are constantly expanding and gaining a richer and more diverse content.<sup>5</sup>

Wagner related the rise of the welfare state to modernisation in a positive sense, and his idea of a connection between modernity and a growing public sector (Wagner, 1879: §§171–178) remains part of the theory of public finance known as 'Wagner's Law'.<sup>6</sup> Wagner was not the first German to use the term, however. Thirty years earlier, in the summer of 1844, Berlin was experiencing discussions on the establishment of an academic association to improve the conditions of the lower classes. An initiative that preceded the founding of *Der Centralverein für das Wohl der arbeitenden Klassen* [Central Association for the Welfare of the Working Class] in October the same year. Karl Nauwerck – a young Hegelian, former private docent at the University of Berlin who had been dismissed at the behest of the government (Lambrecht, 2003) – presented his views on the objectives of the planned Association in the July issue of *Berliner Blätter*. Nauwerck (1844: 5) emphasized, that:

the legal state (*der Rechtsstaat*) does not suffice; it has to develop into the welfare state (*der Wohlfahrtsstaat*) in order to satisfy all social needs. This does not mean that the constitution has become superfluous. On the

contrary. It will be perfected. The objective of the welfare state is to ensure that all members of society are empowered with their human rights. This is the very reason for the requirement that the members in their totality (*die Gesamtheit*) have the obligation to care for the single individual, just as the single individual has the obligation to care for the totality. The counterpart to the obligation of the individual is his or her rights.<sup>6</sup>

Four years later, the County Commissioner Karl von Sparre (1848) wrote a treatise on income taxation. He saw a people living as private individuals only as a multitude, but if the individuals were placed in 'a system' attending to common interests, the people took on the character of an 'ethical personality'. The state, therefore, had to take care of the individual in his physical, spiritual moral and spiritual intellectual capacity, that is, his welfare (*Wohlfahrt*), freedom, rights and education – a tripartite obligation where the single parts had their own specific purposes, but which achieved desired objectives only in interaction. The perfect state was the state in which the three parts formed an inseparable unity: an eudemonic welfare state ('*Wohlfahrtsstaat*'), a state of law ('*Rechtsstaat*') and a cultural state ('*Culturstaat*'). It appears that Wagner's (1876) later use of the term mirrors the three obligations in the process of modernization that move progressively towards stronger interactions.

The basic view of the Evangelical Church was voiced by Jäger (1856) when he wrote that if a state with the intent to become a welfare state neglected its foundation as a state of law (*rechtsstaatlichen Charakter*) a false eudemonism would replace the public conception of justice implying that that state would be at the mercy of egotism. This argument does not rule out the desirability of a welfare state. However, it stipulates that a state in which welfare is among its objectives must simultaneously be a state of law. Whereas von Sparre and Jäger saw the idea of 'welfare state' as integrated with '*Rechtsstaat*' and '*Culturstaat*', Lorenz von Stein – a German academic and founding father of public administration (Singelmann and Singelmann, 1986) – in 1866 described a historical development from '*Wohlfahrtsstaat*' by way of '*Polizeystaat*' towards '*Rechtsstaat*'. The basic idea of the welfare state according to von Stein was that the power of the state is to promote the spiritual and

material welfare of all citizens. The welfare state (as a historical phenomenon), therefore, came to be seen as a compulsory institution promoting the happiness and well-being of the people ('*eine Zwangsanstalt für das Glück der Völker*'). When, however, the science of public administration was detached from the philosophy of law and received independent status, it turned into '*Polizeywissenschaft*' and the state assumed the character of '*Polizeystaat*', that is, a form of government in which the administration exercised comprehensive control of society.<sup>7</sup> The representatives of '*Polizeywissenschaft*' were arguing for well-being and happiness, but they had detached themselves from the ethical reasons underlying the idea of state. Gradually, however, the creation of law as an issue came to the forefront and there was a demand for a new principle, a new idea of the state. This idea came to be that of organized freedom embodied in (contracts and) law. The idea of the *Rechtsstaat* was born with its focus on rules of decision, recognized institutions and an inviolable boundary between free individuals and their rights on the one side and the state and its administrative apparatus on the other.

Stein (1876: 212–220) established a distinction between '*Gesellschaftsordnungen der Geschlechter*', '*Gesellschaftsordnungen der Stände*' and the '*Staatsbürgerliche Gesellschaft*'. The latter is subdivided into 'the legal state' (*Rechtsstaat*) and 'the social state' (*Sozialstaat*). The social state is a constitutional state in which economic and societal progress must improve the status of all citizens, because the development of the single individual is a condition for and is conditioned by the development of all other individuals. Von Stein's history of doctrines and his use of the concept '*Sozialstaat*' foreshadows the dismissal of the term '*Wohlfahrtsstaat*' after 1945 and the domination by the terms '*Sozialstaat*' or '*Soziale Marktwirtschaft*' (Kaufmann, 2001). In von Stein's view, '*Wohlfahrtsstaat*' was 'eine Zwangsanstalt für das Glück der Völker', a view reiterated in von Papen's attack on the Weimar Republic (see below), whereas '*Sozialstaat*' had not obtained such negative connotations.

In 1871, the prominent jurist, political scientist and liberal politician Heinrich Rudolf von Gneist, delivered an address to members of the first German parliament.<sup>8</sup> The address was first published in

1872 (Gneist, 1872) with a second, enlarged edition appearing in Gneist (1879). His thinking was obviously inspired by von Stein (Hahn, 1977): 'The legal state' – that is, 'the state solely as a coercive institution for the realisation of law' (Gneist, 1879: 29) was in Gneist's understanding a state in which the rights of the individual were safeguarded by proper laws and independent judicial authorities. If, on the contrary, the protection of private rights was subordinated to considerations of public policy ('*Wohlfahrtszweck und Kulturzweck des Staats*' (Gneist, 1879: 173)), then Gneist uses the term 'the negated legal state' ('*die Negation des Rechtsstaats*', p. 158) governed by '*das Gesamtwohl*' (p. 181) or '*das öffentliche Wohl*' (the public well-being) (pp. 169, 179, 182) and in this pejorative sense, the term '*Wohlfahrtsstaat*' was used to describe the French State (*der französische Wohlfahrtsstaat*) (p. 169). In Gneist's view, such states would degenerate into bureaucratic and centralised structures (p. 176), and eventually return to a status of dictatorship or despotism (p. 173). The only guarantee against this development was a well-rooted legal state – a state of law.

Wagner and Gneist represent different understandings of the term '*Wohlfahrtsstaat*': One associated with ambitions for (or resentment towards) an active state and social reforms, and one using the term for categorization of states. Wagner's understanding is closer to our present day understanding of the welfare state as the guarantor of social rights and producer of social services. It was also this economic understanding of the welfare state as associated with social reforms that became the dominant understanding in interwar Germany, even though the two most prominent German sociologists, Ferdinand Tönnies and Max Weber, used the term in a manner closer to that of Gneist and von Stein.

Whereas Wagner argued in terms of modernity, Ferdinand Tönnies' initial ideas exemplified anti-modernity (Deflem, 2001). In 1914, Tönnies published his reflections on state and society (Tönnies, 1914). In the *Rechtsstaat*, social and economic relationships between individuals would be regulated by contracts with the State serving as umpire, whereas in the *Wohlfahrtsstaat*, the State itself regulated

relations by law. Mercantilism and enlightened Absolutism were seen (cf. von Stein) as early incarnations of the welfare state from which grew the liberal, contractual state. However, since contracts between workers and employers implied inequalities, contractual freedom had to be limited, thus indicating a trend towards a new welfare state. The limitation on contractual freedom could be offset if the working class were capable of forcing capitalists to accept an equitable social order either through codetermination of industry by trade unions, control of the factories by the working class or a spread of the cooperative movement into the sphere of production. Tönnies, however, was concerned about the development of the 'new welfare state': One has to be concerned that the future state assumes the character of a prison'. Three years later, caught up by national enthusiasm, Tönnies (1917) compared the English and the German state systems. He identified the welfare state with the German state system, an offspring of *Gemeinschaft*, whereas the contractual state was an English hallmark, an offspring of *Gesellschaft*.

Max Weber used the term '*Wohlfahrtsstaat*' only sporadically. In his discussion of the three types of legitimate rule (Comrad, 2003: 60; Weber, 1922), the term appears in his discussion of traditional domination ('*Traditionelle Herrschaft*'): 'All codification and laws of patrimonial rulers breathe the spirit of the so-called "welfare state": a combination of socio-ethical with socio-utilitarian principles prevails and breaks through every formal rigour of law,' an echo of von Stein.

Our analysis clearly confirms that German intellectuals of the 19th century originated the term '*Wohlfahrtsstaat*' 35 years earlier than usually stated in the scholarly literature, and with different meanings and connotations than our contemporary understandings. Before crossing the Channel to look at developments in Britain, let us examine the German discussions in the 1920s and 1930s. Here we find references back to the earlier German meanings but also 'ideological innovations' (Skinner, 1989) and a broader political popularization as the term 'welfare state' was used in the modern sense of referring to the social security system by both protagonists and critics.

## The term 'Wohlfahrtsstaat' in Weimar Germany

Even though von Stein, Gneist, Wagner, Tönnies and Weber were prominent figures in Germany, we have found no examples of the term 'Wohlfahrtsstaat' in political discussions of Bismarck's social reforms. After the turn of the century, however, in the heated debates in the Catholic Centre Party on the stance towards the Bismarckian social legislation, the prominent politician Georg Hertling, who would later become chancellor of Bavaria (1912–1917) and of the German Empire (1917–1918), argued in favour of a welfare state:

The view that the State could restrict itself to ensure the security and protection of the rights of the single citizen was until a few years ago an accepted truth, and the contrast between a *Rechtsstaat* and a *Wohlfahrtsstaat* was taken for granted ... but if one (today) delineates the functions of the State in this manner, one will immediately recognise that it is impossible to separate the protection of rights from the care of welfare (*Wohlfahrts-pflege*) (Ritter, 1954: 126).

Nevertheless, the term did not truly enter the German political vocabulary before the interwar period. In this section, we will show that in the heated discussions around the German Weimar Constitution between 1919 and 1933, both critics and defenders made use of the term 'Wohlfahrtsstaat'. We thus find an understanding of the term that is close to present-day definitions (see Briggs 1973).

Kaufmann (2001) describes the Weimar Constitution (1919) as the first social or 'welfare state' constitution of the world. The Centre Party was the only Weimar party that programmatically endorsed the 'welfare state':

In addition, the Centre Party assigns the welfare state comprehensive tasks of immediate public welfare and social care that are to be solved alongside free and church-run charitable activities. (quoted from Mommsen, 1982: 486–489)

During the 1920s, 'welfare state' was rarely used to describe social realities in the Weimar Republic (Abelshauser, 1987). The term was used only in the

very last years of the Republic. Contemporaries of the 1920s preferred to describe the social objectives of the new state using terms such as 'sozialer Rechtsstaat' or the older term 'Sozialstaat' (Ritter, 1991; Kaufmann, 2001), that is, similar to the von Stein view. Six months before the Nazi take-over, Franz von Papen took office as German chancellor and issued a proclamation (*Akten der Reichkanzlei: Regierungserklärung vom 4 Juni 1932*; Huber, 1991: 539–541), reflecting the fact that many persons, groups and parties during the latter half of the decade had come to see the social programmes as dysfunctional and transforming the social state into a welfare state – in its pejorative meaning of an all-providing state ['Versorgungs- oder Fürsorgestaat']. The previous governments, the proclamation said, 'have considered themselves able to relieve material concerns of employees and employers by a steadily intensified state socialism. They have turned the State into a kind of welfare state and by doing so, have weakened the moral strength of the nation. The state has been attributed responsibilities and obligations which it naturally cannot fulfil.'<sup>9</sup>

Von Papen's attack on the welfare state did not go unnoticed at the time. It was part of a frontal attack on the Weimar social security system and the labour movement's welfare agencies (*Wohlfahrtsorganisationen*) (Sachße and Tennstedt, 1992). The attack was to some extent backed by Catholic critics of the welfare state (Crew, 1998: 207–211). However, the existing literature places very little emphasis on how the proclamation also triggered a positive use of the term 'Wohlfahrtsstaat'. This was voiced in particular by the journal *Arbeiterwohlfahrt*, founded in 1919 as the journal for the union of social democratic welfare agencies (*Hauptauschuss für Arbeiterwohlfahrt in der SPD*) (Crew, 1998: 22–23). The headline of the journal, published on 15 June 1932 read 'In Favour of the Welfare State' (*Arbeiterwohlfahrt* (1932) 7(12): 353–357). Hans Maier, having joined the Social Democratic Party in the mid-1920s, had been the most articulate ideologist in defence of the welfare state. In his view, the main objective of 'Wohlfahrtspflege' (social care) was to reduce (and eventually eliminate) the risks entailed in life (*Arbeiterwohlfahrt* (1930) 5(22): 673–678).

The word 'welfare state', which to some extent is used with a tinge of scorn when referring to the innovative quality of our legislation, is a programme for us, a point of attack for the neo-Malthusians, the Manchester people and those who do not desire the risk-free human being. The decision concerning a *laissez-faire* regime or a welfare state is a political decision that is also crucial for the formation of social care (*Arbeiterwohlfahrt* (1929) 4(20): 611).

In 1932, Maier gave a direct answer to von Papen's anti-welfare state proclamation (*Arbeiterwohlfahrt* (1932) 7(15): 467–470). He argued that the dismantling of democracy was putting social welfare at risk, because the only weapon of the working class, its votes in the democratic elections, was deprived of its value. Instead of von Papen's negative image of the moral corruption of the Weimar republic Maier launched the more positive image of 'a state that protects the weak, takes care of the sick and provides care for the old' based on mutual help and 'filled with a cooperative spirit'.<sup>10</sup>

The journal emphasized that it was the responsibility of the Social Democratic Party to turn Germany into a 'Wohlfahrtsstaat' (*Arbeiterwohlfahrt* (1932) 7(16): 481–482). The reestablishment of the People's State [Volksstaates] and the political strength of the working class were the prerequisites for rebuilding the welfare state (*Arbeiterwohlfahrt* (1932) 7(18): 545–553). This was followed by a special edition with the title 'Kampf um den Wohlfahrtsstaat', in which it was asserted that only a State built on the welfare of all citizens could have a permanent existence.

All experts know that the welfare state has contributed to the health of the people to an extent never seen before, and they know that the combat against the distress of the people has been possible only by the mechanisms of the welfare state (*Arbeiterwohlfahrt* (1932) 7(20): 609–620).

Similar positive connotations can be found in other political pamphlets from the early 1930s showing that the term 'Wohlfahrtsstaat' was not used solely in a pejorative way as part of an attack on the social insurance system of Weimar Germany. The term was definitely contested.<sup>11</sup> During the 1930s,

social and political developments in Germany became dominated by the Nazi party and its ideas of 'Volkswohlfahrt' (Götz, 2001). Use of the concept 'Wohlfahrtsstaat' became rare. After 1945, the term 'Wohlfahrtsstaat' never regained any importance but was instead replaced by the concept 'Sozialstaat' (Kaufmann, 2001).

## British welfare state literature and the origins of the term 'welfare state'

In British welfare state literature we find a lot of statements and hints on the possible origins of the term 'welfare state'. But these only very seldom refer back to possible German precursors. Peter Hennessy (1992) and Rodney Lowe (2005) have noted that British intellectuals may have been picking up and translating an even older usage in Germany in the 1920s. F.A. Hayek, in 1960 (1960: 502), noted (without offering any documentation) that the origins of the term were to be found in the works of 19th-century German scholars discussing the more favourable aspects of the 18th-century government, and that a more recent conception had been developed by 'the socialists of the chair' from about 1870 onward.

In British welfare state historiography, however, the term 'welfare state' is normally attributed to more homegrown thinkers such as William S. Temple, Alfred Zimmermann and George Schuster (Pelling, 1985). Synthesizing the comprehensive literature on the development of the British welfare state, these three scholars are viewed differently by various authors. Archbishop Temple's 1941 book *Citizen and Churchman* is the dominating point of reference as most scholars agree either to acknowledge him for being the first to use the term (Heidenheimer, 1983), being the first to put it into writing (Bruce, 1961; Gregg, 1967; Timmins, 1963) or being responsible for popularizing the term (Lowe, 2005; Woodroffe, 1968). However, other studies have traced the British use of the term further back in time. The *Oxford English Dictionary* states that 'The term welfare state is sometimes said to have been coined by the Oxford scholar Alfred Zimmermann in the 1930s, but it has not been traced in his published writings.'<sup>11</sup> This is a line of attribution



stretching back to the 1960s, where it can be found in Bruce (1961) and Woodroffe (1968), but without quoting a source. The German historian Gerhard A. Ritter (1991) added support to this view by pointing to Alfred Zimmern's *The Prospects of Civilization* (1939), where Zimmern used the term 'welfare' in describing the functions of the democratic state in contrast to the fascist state. The British historians Henry Pelling (1985), Douglas E. Ashford (1986) and Peter Hennessy (1992: 121) have found the reference to the dichotomy between 'welfare- and power states' in Zimmern's *Quo Vadimus* (1934). Ashford's and Hennessy's interpretation has been referred to in several subsequent works (see Deakin et al., 2004; Oakley, 1994; Pierson, 2006). Pelling and Hennessy further credited the economist George Schuster for an early use of the term 'welfare state' (Schuster, 1937). The result of this brief literature review can be summarized as follows: the first British use of the term 'welfare state' is by Zimmern (1934 and 1939), closely followed in 1937 by Schuster and finally William Temple (1941).

### The shifting meanings of the term 'welfare state' in interwar Britain

In this part of the article we will discuss how Temple, Zimmern and Schuster talked about the 'welfare state'. We address the existing literature with two important corrections. First, the order of appearance needs to be corrected, as the first occurrence of the term was in 1928 by William Temple.<sup>12</sup> Second, if we dig deeper into Temple's, Zimmern's and Schuster's understanding of the concept as a type of state rather than a social security system, it becomes clear that the scholarly literature has overlooked differences in the British meanings of the term before 1945 compared with our more contemporary use.

The British political climate in the interwar period certainly lacked the intense drama of German politics. Still, several scholars have underscored that the decades of 1920s and 1930s were a period of intellectual uncertainty, where new ideas on the relationship between state, market and society were tested in more or less overlapping academic and political circles such as the social liberals (Freeden, 1986),

Christian intellectuals (Grimley, 2004) or the Fabian Society. It was in this particular intellectual climate of uncertainty that William Temple, Alfred Zimmern and George Schuster began to discuss the 'welfare state'. Temple, Zimmern and Schuster belonged to the same generation. They were all born between 1874 and 1881. They were all classicist 'quintessential Oxford men': Temple educated at Balliol, Zimmern and Schuster at New College. They shared an Oxbridge intellectual background rooted in the philosophical idealism of the Balliol professors T.H. Green and Edward Caird and coloured by Christianity. Obviously, they were all men with an international outlook and acquainted with German and German thinking (see below). It is noteworthy that all three used and elaborated the term welfare state as part of a dichotomy. Whereas the pre-Weimar debate reflected a dichotomy between the welfare state and the Rechtsstaat, with von Stein and Oneist mainly in favour of the latter and Nauwerck, von Sparre, Wagner and Meyer to some extent in favour of the former, the British ideological innovators (Skinner 1989) preferred the term 'welfare state' rather than its counterpart the 'power state'. The Weimar debate reflected to a greater extent the later debates on the welfare state as a term loaded with either positive or negative connotations. The following sections discuss Temple, Zimmern and Schuster's views in chronological order.

Temple was ordained a priest only in 1909. During the war years, he took the lead in efforts to revitalize the national Church. In 1920, he was offered the bishopric of Manchester, where he served for 8 years (1921–1929). In 1929, Temple was named archbishop of York, serving until 1942. Despite disaffection in political circles with a number of his public utterances and activities, in 1942 he became archbishop of Canterbury. He died 2 years later. As a young lecturer in philosophy at Oxford, Temple visited Germany and became familiar with, among others, the sociologist Simmel and the philosopher R.C. Eucken (Iremonger, G. Simmel 1948). Except for the church historian Mathew Grimley (2004) and the political scientist/theologian David Nicholls (1989), scholars have overlooked the fact that Temple was the first to introduce the term 'welfare state' in a little book entitled *Christianity and the*

*State* (1928). However, Temple did not use the concept in the modern meaning (as a social security system). His use was almost casual, in a passage describing why it had been necessary to fight Germany in the First World War:

The War was a struggle between the idea of the state as essentially Power – Power over its own community and against other communities – and of the state as the organ of community, maintaining its solidarity by law designed to safeguard the interests of the community. The power-state has yielded to sheer pressure of circumstance in course of time, but it is contrary to the psychology of the power-state to suffer conversion; it was likely to fight before it let a welfare-state take its place. (Temple, 1928: 169–70)

Even though he did not refer to Tönnies, Temple's social theology was based on a distinction between state and community. A welfare state was a state in which government acted as 'the organ of community', but it was not linked to any notion of comprehensive governmental intervention in the form of social security or social insurance arrangements.

Thirteen years later, Temple published *Citizen and Churchman* (1941a), which is the book usually referred to by welfare state scholars. Its focus is on the relation between state and church. The state could not be reduced to power in a conceptual sense. It had to be the source and keeper of law, the realm of the state being legality and legitimacy. The state could never be its own objective, but had to serve as 'an organ of the community'. If the citizens are subordinated to the state as absolute and sovereign over its subjects and against other states, 'the State is Power'. On the other hand, if Christian presuppositions are accepted, then 'in place of the Power-State we are led to that of the Welfare-State' (Temple, 1941a: 35). *Citizen and Churchman* includes no specific recommendations because '[the Church] is not entitled in its corporate capacity to advocate specific remedies ... the Church lays down principles; the Christian citizen applies them; and to do this he utilizes the machinery of the State' (Temple, 1941a: 82–83).

In another book, also published in 1941, Temple spelled out a social programme in more detail,

without, however, actually using the term 'welfare state'. Like *Christianity and the State* (1928), *Christianity and the Social Order* (1941b) has been neglected by welfare state scholars despite its presentation of social policy proposals and despite the fact that in its Penguin edition (1942) it sold more than 140,000 copies (Norman, 1976: 367). In the concluding chapter, Temple develops a virtual social programme: (a) there must be housing available for all citizens, within their means, in which a family could be brought up in health and happiness; (b) well-functioning families presuppose paid holidays as well as family allowances; (c) labour must share at least equally with capital in controlling industry; (d) the excessive size of school classes must be reduced to ensure proper attention to the individual children; (e) the number of years of compulsory schooling must be increased; (f) all schools are to be open for all children if they are qualified mentally, physically and personally; (g) unemployment must be eliminated; (h) all citizens should be secured a reasonable income; and (i) the basic rights of freedom are to be assured. It is noteworthy that Temple, in *Christianity and the Social Order* did not use the term 'welfare state' at all. It suggests that he was only using the term as a contrast to the power state and hence, that it had nothing to do with the welfare state as we understand it today (as a social security system). This is also illustrated in the House of Lords debate on the Beveridge Report in 1943, where Temple in same manner as Beveridge (Harris, 1997: 452) preferred using the expression 'the great institution of Social Services' rather than 'welfare state' (HL Deb 25 February 1943, vol. 126 cc307–55, esp. 315–320).

During the interwar period, Temple was not alone in characterizing the 'welfare state' as a type of state (in opposition to the 'power state') rather than as a social security system. Zimmern and Schuster, from their international relations perspective, used the term in a different way than used conventionally today. Zimmern is generally considered a founding father of the academic discipline of 'International Relations', and his use of the term 'welfare state' should be interpreted in this perspective. With his Oxford background as a classical scholar, the First World War changed the centre of gravity of Zimmern's

interest (Markwell, 1986). From 1917, he worked with the Ministry of Reconstruction, analysing the economic policies for post-war Germany. For 2 years (1919–1921) he held the newly created Wilson Professorship of International Relations at University College, Aberystwyth, and he taught at Cornell University (1922–1923). In 1930, Zimmern returned to Oxford as the first Montague Burton Professor of International Relations, holding that chair until 1944. He was a founder of the League of Nations Society and spent time in Geneva studying and influencing the developing League of Nations. In international relations Zimmern saw the world divided into two blocs: welfare states and power states. He described them through a set of dichotomies (Zimmern, 1934: 31–32): law vs power; responsibility vs force; constitutional vs revolutionary; decentralization vs centralization of power; the state as an instrument needed to establish well-being vs the state as an object in itself to which people were subservient. Zimmern's point was that effective international cooperation could take place only between welfare states where the internal political life (or political culture) mirrored social welfare as an established practice, contrary to totalitarian power states. Hence,

we cannot at present hope to establish stability for the world's life or a permanent foundation for world-order by means of an association between states of these two fundamentally different types ... The welfare state is co-operative by its very nature ... But the power state, which represses co-operation at home, can have little desire or facility for practising it beyond its own sovereign border. Power politics, in fact, are not co-operative but fiercely competitive. (Zimmern, 1934: 32–34)

For Zimmern, the term 'welfare state' was another term for the ideal of a liberal democracy more than a term describing a state ensuring security for its citizens from cradle to grave. Zimmern's understanding approached that of Temple. Zimmern was an idealist within the school of international relations, and his distinction between welfare and power states was criticised by the historian E.H. Carr:

Having divided existing states on popular lines into those which pursue 'welfare' and those which pursue 'power', Professor Zimmern revealingly adds that 'the

welfare states, taken together, enjoy a preponderance of power and resources over the power states' (Zimmern, 1934: 41) thereby leading us infallibly to the correct conclusion that 'welfare states' are states which, already enjoying a preponderance of power, are not primarily concerned to increase it, and can therefore afford butler, and 'power states' those which, being inferior in power, are primarily concerned to increase it, and devote the major part of their resources to this end. In this popular terminology, 'welfare states' are those which possess preponderant power and 'power states' those which do not (Carr, 1939: 110).<sup>13</sup>

It seems obvious from both Zimmern's own presentation of the term and Carr's discussion that 'welfare state' is used differently from how we would understand it today. This is also the case with George Schuster, who was one of the architects of British colonial policies from the 1920s until the 1950s. After reading for the bar, he went into banking, but subsequently became attracted to politics. Schuster became an official in various British colonial governments, serving in financial and economic posts before in the mid-1930s, became chairman of a large retailing group in Britain – the Thomas J. Lipton group – and in 1938 was elected Liberal National MP in a by-election, serving until he was defeated in 1945. Lecturing at the Fifth Empire Summer School, Schuster (1937; see also Wint and Schuster, 1941) argued that the idea of war was possible only if policy was directed by (totalitarian) leaders seeking 'national greatness' or 'national power', subordinating individual welfare to these purposes. He came close to identifying the opposite to these power states as representative democracy, as developed in Britain and the US, in particular if Britain abandoned any idea of using power over other peoples to secure commercial advantages. In Schuster's view, therefore, avoidance of war was best promoted if welfare states undermined the influence of dictators in power states by producing welfare for their people. Neither Schuster, Zimmern nor Temple understood the term 'welfare state' in the modern sense as a social security system. Britain was defined as a 'welfare state' only insofar as it represented 'a state governed by law, rather than power ... an image of a classical liberal democracy' – echoing the older German term 'Rechtsstaat' (Edgerton, 2006: 59–60). This might

also explain why the term 'welfare state' as discussed in the 1930 and 1940s remained part of an elite discourse (contrary to Weimar Germany, where it became part of the political struggle between left and right). Even though William Temple's books were sold in impressively high numbers, we cannot identify any diffusion of the term 'welfare state' into the broader British political debate.<sup>14</sup> This is also confirmed by the fact that when the phrase 'welfare state' was used for the very first time in the House of Lords (HL Deb 25 November 1947, vol. 152 col. 856), it was applied to the Burma Independence Bill. The Secretary of State for Burma noted that the new Burmese Constitution was a statesmanlike document proclaiming a varied list of individual rights, in complete accordance with the modern view of a 'welfare state'. It may be argued, that in some respects the parliamentary use of the term derived from discussions within the broad field of International Relations rather than social policy.

Peter Hennessy (1992) and Rodney Lowe (2005) argue that British intellectuals may have been using and translating the term 'welfare state' from Germany, but they offer no specific evidence supporting this argument. As the texts analysed here often lack (explicit as well as implicit) references, the evidence of a diffusion process from Germany to Britain is best described as circumstantial. First, Temple and Zimmern had close connections to Germany. Second, there was an exchange of ideas between German and British intellectuals as well as policy-makers (Hennock, 1987; Rodgers, 1998) and in the 1930s some German academics escaping Nazi Germany ended up in Britain (Freedon, 1986). We can occasionally find 'welfare state' in the *Annals of the American Academy of Political and Social Science* from 1894 where 'welfare state' is explained in a footnote by the translator as follows: 'Wohlfahrtsstaat. The idea that the State should not merely protect the persons and property of citizen, but should also endeavour to promote their welfare by some more positive action or interference on their behalf' (Cohn et al., 1894). Another example of a German reference is in an article by E. Caseliot (1897) published in *Economic Journal*, where the German term 'Wohlfahrtsstaat' is explained as a promoter of

material and moral prosperity under the spiritual guidance of the Church. However, such hard evidence is very rare before 1945 and developing a transnational history of the lexical diffusion of 'Wohlfahrtsstaat' to 'welfare state' would demand detailed studies of the intellectual biographies and personal archives of the main characters in the story told here.

## Conclusions

This article has traced the historical origins of the now established and popular term 'welfare state'. The term was first used – as 'Wohlfahrtsstaat' – in Germany in 1844, 35 years earlier than acknowledged by existing welfare state literature. It was a way of describing both the constitutional infrastructure of the modern state, distinguishing between the positive 'Rechtsstaat' and the more problematic 'Wohlfahrtsstaat' (by von Sparre, Jäger, von Stein and Gneist), but it was also used by social political minded economists in a more modern sense as a way of describing the purpose of the state (by Wagner). However, it was not until the late 1920s and early 1930s that the concept became used in political debates between opponents of the Weimar system and German social democrats concerning the social security system of the Weimar Republic. Here we find a meaning that came very close to our present-day understanding of the welfare state. Whereas the term 'Wohlfahrtsstaat' lost its resonance in Germany after the Nazi take-over in 1933, the idea of a 'welfare state' was used in Britain from the late 1920s and through the 1930s by a group of prominent and influential academics. This has been observed by a number of scholars, but in the social policy literature, expositions have so far not taken notice that William S. Temple was the first of this academic group to use the term in his 1928 publication *Christianity and the State*. And, more importantly, closer study of the use of the term in interwar Britain shows that scholars used it in a fashion quite different from our modern understanding of it. Their understanding of the welfare state was closer to the early German understanding of a welfare state as category for describing nation states, albeit with totally different

connotations than found in the German case. It is a discussion that goes beyond the scope of this article, but it seems plausible that this can explain the very different destiny of the term in the two countries after the Second World War. In Germany, the term 'Wohlfahrtsstaat' was politically forgotten after 1945, and 'Sozialstaat' or 'Soziale Marktwirtschaft' became the dominant terms (Kaufmann, 2001). In Britain, meanwhile, the term 'welfare state' became increasingly popular after 1945, enjoying a genuine breakthrough in the years 1949–1951 – enjoying, however, a different meaning from the dominating one in the interwar period and during the Second World War.

Concepts have a life, and like most lives, they are not linear. This study shows that we must not assume any linear development about the 'welfare state' concept from the debates in the late 1920s, 1930s and the 1940s to the post-war era. The meaning as well as the connotations of 'welfare state' changed significantly over time, and as argued by Farr (1989) and Leonhard (2008), the historical context is essential in order to carry out any kind of comparative study of terms and concepts. The welfare state cannot easily be applied as an analytical concept in comparative research in space or over time without taking these conceptual regimes into account.

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#### Notes

1. The term had its political breakthrough in the post-1945 period. The study presented in this article is part of a larger project, entitled *Welfare State: The Entangled History of a Concept*, in which we discuss the history of the term 'welfare state' as used in Germany, Britain, the US and Scandinavia from 1850 to 1960. A major part of the project will deal with post-war developments showing the very different

careers of the term. Rather than talking about a universal breakthrough of the term 'welfare state' in the post-war era we find a very mixed picture. In the US it became a widely used negative term; in Germany the term was deliberately changed to the alternative concept 'Sozialstaat'. In Britain and Scandinavia we find more positive images (but also scepticism).

2. It is no coincidence that the 10-volume *Geschichte der Sozialpolitik in Deutschland seit 1945* begins with a very detailed history of the concept 'Sozialstaat' (Kaufmann, 2001).
3. In this article, we prefer using 'term' rather than 'concept' (understood as 'a basic unit of thinking' (Sartori, 1984)). Both 'state' and 'welfare' have a very long history of their own. See Conrad (2005) and especially the very detailed entries 'Wohlfahrt' and 'Staat und Souveränität' in *Geschichtliche Grundbegriffe, Historisches Lexikon zur politisch-sozialen Sprache in Deutschland* (Brunner et al., 1972–1997). In this article we focus only on the combined term 'welfare state'.
4. This and the subsequent quotes translated from German into English by the authors.
5. Nauwerck's arguments were reported by *Elberfelder Zeitung* on 11 August 1844 and by *Jeverländische Nachrichten, Beiblatt zum Jeverischen Wochenblatt*, 25 August 1844.
6. 'Policey' is etymologically derived from the Greek *πολιτεία (politeia)*, which originally meant domestic affairs. Since medieval days 'good Policey' has in the German context been identified with 'good administration'.
7. In 1850, Gneist had become a member of the Centralverein für das Wohl der arbeitenden Klassen. During the period 1868–1895, he served as its chairman (Reulecke, 1985: 39). Following the Eisenach meeting in 1872 – largely initiated by members of the Centralvereins – the Verein für Sozialpolitik was founded, and Gneist was elected as president.
8. Even though it has become a standard reference in the scholarly literature, it is unclear whether von Papen actually used the term 'Wohlfahrtsstaat'. Huber (1981) refers to the first draft of the proclamation, in which the term 'Wohlfahrtsstaat' is used. In the second draft, however, the term 'Wohlfahrtsstaat' is inserted, this being a pejorative term frequently applied by the opponents of the Weimar Republic and also by von Stein and Gneist (see Bundesarchiv R 43 I/503).
9. This was also noticed outside Germany by American media and in academic reviews. For example, see the presentation of von Papen's 1932 declaration in *Christian Science Monitor* on 12 January 1933, as

well as Ebenstein's (1939) review in *American Political Science Review*, in which he introduced distinctions between power states and welfare states similar to Temple and Zimmer.

11. <http://dictionary.oed.com/> (entry: 'welfare state').
12. The term 'welfare state' was used even before that in an article by E. Castelot (1897) published in *Economic Journal* referring to the earlier German debate. In this article, the German term 'Wohlfahrtsstaat' is explained as a promoter of material and moral prosperity under the spiritual guidance of the Church (Castelot, 1897). In 1940, the German historian Gerhard Ritter published *Machtstaat und Utopie* ('Power state and utopia') in which he used the terms 'welfare state' and 'power state' in a way similar to Zimmer (Ritter, 1940: 87–88).
13. This is confirmed by full text searches of leading British newspapers such as *The Manchester Guardian* and *The Times*.

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