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Globalization and its Effect Upon the Welfare State

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ABSTRACT

This research paper examines the relationship between globalization and its impact on the welfare state. Globalization refers to the increasing interconnectedness and interdependence of nations and individuals, driven by advances in technology and transportation. The welfare state, on the other hand, refers to a system of social policies aimed at ensuring the well-being and protection of citizens through the provision of various forms of social support. The paper explores the ways in which globalization has affected the welfare state, both positively and negatively, and discusses the implications of these changes for the future of social welfare policy. Through an analysis of the available literature, the paper seeks to provide a comprehensive understanding of the complex relationship between globalization and the welfare state.

Keywords: Globalization, Welfare state, Economy, Society.

I. INTRODUCTION

The contact and integration of people, businesses, and governments around the globe is known as globalisation. The term “globalisation” first appeared in the early 20th century (replacing the earlier French term “mondialisation”), took on its current meaning sometime in the second half of the century, and first gained widespread usage in the 1990s to describe the unprecedented global connectivity of the post-Cold War world². Due to advancements in communications and transportation technologies, it may be traced back to the 18th and 19th centuries at its inception. The expansion of international trade and the sharing of ideas, beliefs, and cultures are both results of the increase in global relationships. The main economic connection and integration mechanism that underlies globalisation is linked to social and cultural aspect.

“Globalization affects the economy in terms of commodities, services, information, technology, and financial resources. The opening of new international marketplaces has liberalised trade in products and money. The possibility of creating global marketplaces has increased with the removal of trade obstacles. Developments in telecommunication infrastructure, such as the

¹ Author is an Assistant Professor at Silver Oak University, Ahmedabad, India.

² James Paul and Stager Manfred B, 'A Genealogy Of 'Globalization' – The Career Of A Concept | 6 | Globali' (Taylor & Francis, 2014).

telegraph, Internet, mobile phones, and smartphones, as well as advances in transportation, such as the steam locomotive, steamship, jet engine, and container ships, have been significant drivers of globalisation and have led to increased interdependence of economic and cultural activities around the world.” Wrote James Paul in his book *A Genealogy of Globalization*.

Even before the European Age of Discovery and voyages to the New World, according to some researchers, globalisation dates its origins to the third millennium BCE. Large-scale globalisation, which started in the 1820s, accelerated the fusion of the world's economies and cultures in the late 19th and early 20th centuries. The concept was subsequently made famous by sociologist Saskia Sassen in her book *The Global City: New York, London, Tokyo*.

The International Monetary Fund (IMF) named four fundamental dimensions of globalisation in 2000: commerce and transactions, money and investment flows, migration and human movement, and knowledge transfer.³

“The world is witnessing transformative changes from the last quarter of the 20th century that many regard as paradigmatically different from the earlier phases. These changes are associated with a process called globalization. The process of Globalization is gaining ground in such a way that very few states are left with any option other than opening up their economy and society to the impinging world.”⁴

These developments have a special bearing on the developing countries of the world. The dominant discourse of globalization suggests swift changes integrating these societies into a world markedly different from the ways they were accustomed to or familiar with. They have made many states particularly in the developing world, redefine their role and create opportunities for the market, new technologies and hitherto unfamiliar interactions and exchanges, or face the danger of being left out.

Hence, there has been a sweep of policy reforms in the developing countries. One after another, developing countries have begun to emulate the prescriptions of globalization such as the liberalization policy. How valid is this discourse?

IMF in its reports commented that “It is undeniable that privatization and disinvestment policies are gaining importance in the formulation and expansion of public policy. The concept of political sovereignty is also undergoing changes, as states no longer find it easy to control all aspects of their life against external interactions and exchanges. All these trends are affecting the social relations and policies of the developing states.”

³ International Monetary Fund, *Globalization: Threat Or Opportunity* (2000).

⁴ World Bank, *Integration with the World Economy*, (2000) http://www.worldbank.org/data/wdi/pdfs/tab6_1.pdf

Emphasis on economic growth is also affecting developmental priorities. The question however is to what extent? Have the states been dislodged from their hitherto dear priorities, or do they still define their agenda?

World Bank's economic report, *Integration with the Global Economy, 2000* shows that "out of 145 States surveyed, most states reflect an increased integration into the world economy across the board. The World Bank determines integration according to several indicators taken from 1987-1997: increase in trade in goods, growth in real trade, less growth in real GDP, gross private capital flows, and gross foreign direct investment."

(A) Review of literature

Often the discourse on globalization has revolved around the question as to whether it is old or new. The writings of several scholars such as Matthias Finger (1997), Roland Robertson (1992), Robert Gilpin (1987) and Vandana Shiva (1989) Build up such a trajectory. However, these scholars primarily look at globalization from a paradigm evolved to explain other developments such as modernity. Globalization can never be wholly reduced to perspectives evolved to explain other developments as they do not recognize the characteristics distinctive to Globalization. Anthony Giddens (1990), David Harvey (1989), Gilpin (1987), James Mittelman (1996) Mauro F. Guillen (2001), Paul Hirst and David Held (2002) Consider globalization as a process distinctive, given its supra-territoriality, 'distanciation' and compression of space and time. They help us to see globalization as a distinct phenomenon which is quite recent and that it cannot be reduced to that understand earlier phases. However, they do not help us much, to analyse globalization as a highly differential process caught in the specific histories of discrete societies. The writings of Robert Nozick (1984), Milton Friedman (1962) and Friedrich Von Hayek (1991) have inaugurated and justified neo-liberalism and have been profoundly critical of the welfare state. While these writings are helpful to Understand neo-liberal globalization, they do not provide resources to understand Alternative ways of expressions of globalization. Globalization is often linked to capitalism and imperialism as it is often argued that it has close affinity with imperialism. Immanuel Wallerstein (2004), Samir Amin (1997), David Harvey (2005), Ronald H. Chilcote (2002) and James Petras and Henry Veltmeyer (2001) invoke such a stance in their own distinctive Ways. "But such a perspective does not explain adequately or help us to act on social relations spawned by globalization. Several theorists of globalization take on their stance on one or the other understanding of globalization." There are Globalists, Internationalists and Transformationalists the distinctions highlighted by scholar Such as Held (2004) and Chilcote (2002). A big problem with this distinction is the Invocation of processes which are susceptible for reversal. Dani Rodrik (1997), G. Garrett (1999), Nicola Yeates (2001),

Ramesh Mishra (1999), Jan Aart Scholte (2000) and Sam Gindin (2002) explore the relationship between globalization and welfare. Generally, they seem to endorse the impact the former has had on the latter. But they do not adequately consider the possibility of the welfare state defining its Own ways of globalization. The writings of Deepak Nayyar (1996), Martin Albrow (1997), P. McMichael (1996), Paul Hirst and G. Thompson (1996), Peter Evans (1997) and Saskia Sassen (1996) provide a differentiated understanding of the role of the state in the context of globalization

(B) Hypothesis

This study revolves around the following hypothesis:

1. There is no single, universal version of globalization but highly differentiated expressions of the same. Similarly, there is no singular model of the welfare State, but different societies have imparted their own nuances to it.
2. The welfare state has not collapsed under the impact of globalization but has taken on new forms.

(C) Objectives of the study

The study has been initiated with the following objectives in view:

1. To critically assess the various positions and understandings regarding globalization.
2. To study the forms of welfare state and the kind of justifications it invoked.
3. To estimate the impact of globalization on the welfare state and the responses of the latter.

II. THE CONTENTIOUS DOMAIN OF GLOBALIZATION

Mathhias Finger in his book *people's perspective on Globalization* wrote: "The welfare state's economic, political, and ideological environment have been significantly affected by three recent important developments: the globalisation of the economy, the socialist system's downfall and the relative decline of the state. in these main Essentially, advances shape the altered economic, political, and ideological the welfare state's context." The forces of globalisation have been affecting throughout the last three decades. the nation-political, state's social, and cultural environment. Many believe that the laws the that the state fostered throughout time are now in a crisis. Economic forces have been a significant contributor to this transition. Despite that, this the change process includes social, political, and cultural elements that connections in technology and the economy progressively alter territorial, the state for

many years supported the legal and political sectors.

This chapter tries to comprehend the globalisation dynamics that significantly undermine, if not entirely disprove, the welfare state's legitimacy. This article will thus make an attempt to comprehend the parts of globalisation that have an impact on state of welfare. The conversation and globalization's tendencies will be covered to obtain

a broader viewpoint on the factors influencing modern social connections. Is globalisation new or old? Is it a given? Does globalisation lessen the effects of social and disparities in the economy? what are the driving forces behind globalisation? Who benefits from it? If we want to evaluate, these questions become crucial for the importance of the welfare state in a globalised world.

(A) Situating Globalization

What are the consequences of the idea of economic "globalisation" for the structure of the global economy? These are the topics this introduction article addresses. There are many meanings of globalisation that are brought forward and debated. The ramifications of the notion of globalisation are then evaluated, especially in terms of the potential for the international system's governance. There is a suggestion that governance is still necessary and that there are still chances to advance it. The extent of the global economy's interconnectedness, as represented by the globalisation thesis, is seen to be overestimated, which undervalues the potential for regulation. In the framework of a continuous commitment to a basic level of multilateralism among the key participants in the system, the significance and role of the Triad—the United States, the European Union, and Japan—are emphasised. Finally, the potential future direction of the global economy is examined.⁵

Around 1960, the term "globalisation" was first used in its broadest sense. Its hallmark was the emergence of supra-territoriality, which included communications, organisations, commerce, money, ecology, and awareness across widely separated sites at the same time and their instantaneous movement across locales. Globalization is certainly a phenomenon of recent decades in these interconnected areas.

Even if its previous mappings may have seemed insufficient at the time, limiting the globalisation process to recent years does not always mean that they should be ignored. In fact, these mappings aid in our understanding of the complexities and subtleties of this process. Over the last two decades, globalisation has received a lot of media attention. However, its roots may

⁵Matthias Finger, "People's Perspectives on Globalization", *Development*, vol. 40, no.2, June 1997, pp. 15-16

be seen in the writings of several thinkers from the late nineteenth and early twentieth centuries, from sociologists like Saint-Simon to geopolitical analysts like Mackinder, who saw the ways in which modernity was integrating the globe. “The word "globalisation" wasn't truly used until the 1960s and early 1970s. It took the phenomena of globalisation just a few decades for it to become very relevant within the academic community. Supraterritoriality, communications, markets, production, finance, organisation, and social ecology as they are now known did not exist in the postulated early stages of globalisation, and relatively few people were aware of it. Even within that small group, thinking globally was not a primary concern.”⁶

Globalization differs from prior eras due to its size, complexity, and speed. This is what Thomas Friedman refers to as the "democratisation of technology, money, and information," since lower prices have made the once exclusive items more widely accessible to society⁷. The foundation of globalisation is the expansion of cross-border business and organisational relationships. In the words "transnational" and "multinational" started to take the place of terminology like "inter-nationalization" to describe the expanding and deepening networks of cross-border human connection. International is often used to describe how nation-states interact. According to Robert J. Holton, “transnational processes are those that somehow transcend or are not subject to national control or authority. Multinational companies are those that operate in many nations and have the flexibility to move between them. In academic circles nowadays, the word "multinational" is chosen to describe how globalisation work.”

III. CONCEPT OF WELFARE STATE

A welfare state is one that provides its residents with a minimum level of economic security by shielding them from market risks related to old age, unemployment, accidents, and illness. The phrase "welfare state" was initially used in the UK during World War II, and it has subsequently come to refer far more generally to the social welfare systems that have evolved since that time. In order to categorise nations based on differences in the roles that the state, market, and family play in guaranteeing well-being, welfare state researchers have tried to develop typologies. A second line of inquiry has looked at economic, political, institutional, and ideological issues to explain the evolution and variance of welfare states. These studies span a wide range of disciplines. Recent study looks at how the welfare state is changing as a result of economic globalisation, changes in family structures, and gender roles⁸

⁶ David Held and Anthony McGrew, eds., *The Global Transformations Reader: An Introduction to the Globalization Debate*, Cambridge: Polity Press, 2000.

⁷ Thomas Friedman, *Lexus and the Olive Tree*, New York: Farrar Straus and Giroux, 1999, p.50.

⁸ Gøsta Esping-Andersen, *Three Worlds Of Welfare Capitalism* (Princeton University Press 1990).

(A) Typologies of Welfare State

Esping-Anderson focuses on how ideas and attitudes about welfare and the state's responsibility for addressing economic needs have influenced how assistance is provided. He names three fundamental "welfare state systems"

“Liberal welfare states react to demands from the market and the work force. Employment is a prerequisite for receiving several benefits, including pensions and health insurance. For state services, eligibility is determined via means testing, and for those found to be eligible, limited cash and voucher benefits are offered.”

“Conservative/corporatist welfare states prioritise public service delivery above market- or privately provided services. These states often reflect conventional notions of a nuclear family, in which a man provides for the family's needs and a woman looks after the home⁹.”

The idea that the state is the protector of social rights is promoted by social democratic welfare states. These states advocate for high levels of benefit equality to lessen the impact of social class and money. In order to equalise participation in politics among all people, regardless of money, welfare handouts are employed.

This analysis was based on data from 18 nations that had developed market economies in the 1980s. The tendency in the literature to view welfare states as only existing in industrialised democracies rather than considering the welfare system in all nations is reflected by this. Therefore, it is uncertain if this typology will hold true for nations going through a transition to market economy or at various phases of development. This typology also implies that national political cultures, ideologies, and internal political forces influence how nations create their welfare systems. The experience of nations other than the 18 under study is obviously at odds with that supposition, as the growth of their welfare institutions and policies is shaped by external forces such as a globalised economy dominated by transnational corporations as well as external influences from international aid and lending organisations. As a result, the typology created by Esping-Anderson may not accurately capture the welfare state's geographic makeup.

The research by Sainsbury is important for understanding how the welfare state affects individuals differently and how gender ideology influence the design of social services. Esping-Andersen points out that “Certain welfare state structures are founded on conventional notions of the family and gender roles. Sainsbury's theory, which is based on her description of gender ideologies inside nations, defines the underpinnings of entitlement to social support under

⁹ Sonia E Alvarez, *Engendering Democracy In Brazil: Women's Movement In Transition Politics* (Princeton University Press 1990).

various regimes.” She then follows the impacts of welfare regimes on gender relations and the gendered distribution of work in the household and society from this point of departure. Esping-Andersen and Sainsbury both centred their studies on industrialised, Western nations. This methodology is further supported by Sonia Alvarez (1998) in her examination of gender policy in Latin American nations. She wrote “Due to the different ways that gender ideologies are ingrained in various countries' political economies, both studies show that the effects of gender equality reforms in welfare policy differ significantly from one country to the next. This results in a different geographic distribution of welfare provision and well-being.”

IV. IMPACT OF GLOBALIZATION ON WELFARE

“There is a mixed response to impact of globalization on the concerns of welfare. It is widely accepted today that globalization raises economic growth, spreads technology, and contributes to better living standards, in both developing and developed countries. A question is often asked as to whether the rapid growth of cross-border economic, social, technological, and cultural exchange is ‘civilising, destructive or feeble?’”¹⁰ Further it is important to ask the questions, whom does it benefit and how does it affect structures and institutions extending support to the disadvantaged.

It is considered that economies with greater levels of integration expand more quickly and that the process of economic integration brought on by globalisation helps reduce poverty. The nations involved get huge benefits from the free movement of money, including greater opportunities for employment and investment, efficient use of savings, increased economic development, improved governance, etc.

However, the negative effects on issues like social justice, equality, and poverty have been seen as frightening due to globalisation. Globalization promotes a process that favours the market over the state, which erodes local traditions and paves the way for escalating economic inequality. Globalization "increases unemployment" and "worsens working conditions" for those who hold paid jobs, according to critics, endangering social cohesiveness. “Given the economic and historical character of trans-border manufacturing, it is impossible to refute such a claim, but there is evidence that suggests that modern globalisation is associated with rising income inequality and increased job insecurity”¹¹.

It has been suggested that globalisation is "politically problematic and contestable" and that it

¹⁰ Albert O. Hirschman, “Rival Interpretations of Market Society: Civilizing, Destructive, or Feeble?”, *Journal of Economic Literature*, vol. 20, pp. 1463-1484.

¹¹ Quoted from, Christopher Newman, “Globalization: Marxism and Three Worlds”, March 13, 1998, <http://www.Globalization/Marxism/threeworlds/htm>.

represents the "political agenda of an identifiable constellation of powerful social forces." Globalization, which adheres to the free market theory, places more emphasis on accumulating riches than on distributing it justly and fairly, which has a negative impact on the welfare state. "The New Right's neo-liberal economic policies, according to its detractors, target the post-liberal welfare systems, driving the impacted people farther and further to the periphery. Those who see globalisation as important for political economy dismiss its effects on welfare states, and as a result, they completely disregard the welfare functions and activities of the states."¹²

(A) Growing Inequality Within and Across Nations:

It is generally admitted that there is an increasing number of losers, particularly in the poor countries and equally increasing number of unemployed and working poor within the rich countries under globalization.¹³ The World Bank Policy Research Report says that in the past two decades two billion people in several countries are in danger of becoming marginal to the world economy.

"The growing integration is also leading to heightened inequalities within countries. It is said that globalization enforced on behalf of capital, has brought to bear added pressure on domestic populations and political institutions giving rise to development that is 'faceless, placeless and bloodlessly unsympathetic.'¹⁴ Further, The bimodal distribution of income across the globe is becoming even more distinct. The rich are getting much richer while the poor are growing in number, and many are staying poor.

(B) Shrinking Social Sector

Do the advantages of global commerce and financial flows reach the underprivileged groups in society? The primary area in which the effect of globalisation on welfare may be evaluated is the social sector. Although it is said that the poor have benefitted from globalisation, a study of its effects on the social sector reveals contrasting findings. Generally speaking, the free trade market policies do not help the expansion of social sector, they advocate cutting down taxes and reducing state interference instead. The work of Vito Tanzi demonstrates a distinct position on the issue of public spending. He shows that between 1960 and 1980, a period of successive and considerable liberalisation in trade and monetary ties, there was the fastest increase in public expenditure. The interventionist state initially came under scrutiny throughout the 1980s and

¹² David Held, *A Globalizing World? Culture, Economics, Politics*, New York: Routledge Publications, 2004, p. 22.

¹³ Franck Amalric and Wendy Harcourt, "Coming to Terms with Globalization" (Editorial), *Development*, vol. 40, no.2, June 1997, p. 3.

¹⁴ Sam Gindin, "Social Justice and Globalization: Are They Compatible?", *Monthly Review*, vol. 54, no.2, June, 2002, p.4.

1990s, particularly in the UK and the US, but public expenditure increased nevertheless, although more slowly. At the same time, it was spending less on social services, in part due to the initiatives' deteriorating cost-effectiveness and in part as a result of the public sector's growing debt load from prior investments.

Several states are losing their ability to shape national economic growth because of globalisation. Governments now need to increase export output and provide favourable circumstances for foreign investment because of shifting priorities. Several Third World nations are dealing with an extreme reduction in public investment. For social welfare payments or investments in infrastructure, state authorities are compelled to slash public expenditure, weaken their currency, and lower taxes. Due to the auction rates being determined by international financial markets, the privatisation and auctioning of state assets seems to be benefiting the world's financial elites. During the 1980s¹⁵, privatisation increased significantly—by almost 10 times. Dani Rodrik and other globalisation sceptics claim that providing social insurance has become much more difficult as a result of globalisation. Background to the worldwide economic integration are declining governments and their dwindling social duties.

(C) Impact on the Regime of Culture:

In the 20th century, the nation's connection was strengthened as a result of the people assuming control of culture. This leads to a distorted relationship between nationalism and popular culture. However, from the middle of the 20th century forward, cultural minorities began to dispute equitable cultural space inside the nation-state. In opposition to the nation-homogenizing state's cultural functioning, they sought the rights of minorities in terms of culture. Additionally, they contended that equality of treatment involves consideration of the cultural contexts of experience and behaviour, which goes against the nation-traditional state's single method of action. Minorities believed that cultural prejudice was fostered by current national welfare measures.

Minorities contested the welfare state's majoritarian ideology on the basis of equality. They maintained that accommodating diversity lies at the heart of genuine equality and that group-specific rights were necessary to do so. They argued that these rights enabled members of the minority to have the same opportunities to live and work in their own culture as those who comprised the majority. Without such rights, individuals of several minority cultures risk losing their culture, which was seen as a serious loss by the minority. John Rawls and Ronald Dworkin

¹⁵ Clive Cook, "Globalization and its Critics", THE ECONOMIST, 29 September 2001, p.14

both defended the need of redressing "unchosen disparities." "It is necessary to be worried about the discrepancy in cultural membership," as Rawls pointed out.

(D) Impact On Developing Welfare State

"The impact of globalization on developing societies needs to be examined as welfare concerns play a predominant role in these societies. Though today's 'global opportunities are far greater and potentially more accessible than at any other time in world history, developing countries are also further behind than ever before'¹⁶.

The idea is that as a result of globalisation, people are now more susceptible to strange and unforeseen forces that will cause social and economic unrest. Globalization is a multifaceted phenomenon that affects and influences many different fields. As a result, it affects different economies in different ways, even though the broad consensus is that it has some influence on all economies. Globalization's advantages and prospects are unevenly distributed across a relatively small number of nations, which leads to instability and dislocation. The priorities of governments have shifted as a result of globalisation. Governments must increase export output and provide enticing investment conditions for foreign capital. Governments in emerging nations are seeing a remarkable reduction in public investment. For social welfare payments or investments in infrastructure, state authorities are compelled to slash public expenditure, weaken their currency, and lower taxes. Over the course of the 1980s, privatisation had multiplied 10 times by the year 2000. 167 "Over the last ten years, globalisation has significantly increased levels of inequality within these countries, enabling the dominant groups to gain more privileged access to resources while partially ceding authority to multinational corporate organisations. Therefore, it is still required to restore the autonomy of people and communities that had been taken away by globalisation in order to provide a genuine response to the situation. ubiquitous and present from birth' The main point of the argument was that, given cultural differences, equality calls for varied treatment rather than same treatment in order to meet the various requirements".¹⁷

V. CONCLUSION

As with globalization, there are several versions of the welfare state possible. Historically, there have been distinctive versions of the welfare state: Bismarkian, new liberal and the socialist. All welfare states pursued certain universal concerns, but they also pursued them differently.

¹⁶ Bruce R. Scott, "The Great Divide in the Global Village", *Foreign Affairs*, January/February 2001, vol. 80, no. 1, p.174

¹⁷ Cited in, David Mason T., "Globalization, Democratisation, and the Prospects for Civil War in the New Millennium", *International Studies Review*, Oxford, vol. 5, no. 4, 2003, p. 22.

And all of them did not pursue the same things. Some of the most important planks of the welfare state have been education, health, employment, housing and social insurance. But several versions of the welfare state emphasized on other considerations. For instance, the Bismarkian kind of welfare state pursued social cohesion, while the Swedish version of the welfare state emphasized on care and support. Certain interwar developments such as the Beveridge report and Keynesianism play a major role in laying down the rationale of the welfare state while its philosophical underpinnings were deeply marked by new liberalism. However, it cannot be decisively said that all welfare states either accepted this rationale or a specific philosophical anchor. Contemporary liberals have been by and large critical of the welfare state as they thought that welfare states attempt to dole out a particular version of the good, thereby endangering freedom of choice. The bitter critiques of the welfare state have been the neo-liberal scholars who have seen all kinds of ghosts, behind the welfare state. Marxists often have tended to see the welfare state as an attempt to deny the trajectory of class conflict and installing a specific hegemony in its place. But existing welfare states have been much complex entities. They afforded their citizens, a degree of freedom that the laissez faire state could never provide. They have also brought to the fore the conception of the citizen and what he/she is entitled to. In fact, welfare states nurtured modern democracies, and vice versa. Globalization has affected the welfare state in numerous ways particularly in its association with liberalization. Under the impact of globalization, many states had to radically re-alter existing policy measures. Globalization also made it impossible to sustain a range of policy measures primarily postulated within the framework of the nation-state.

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