

The Nordic Welfare State

北欧福利国家

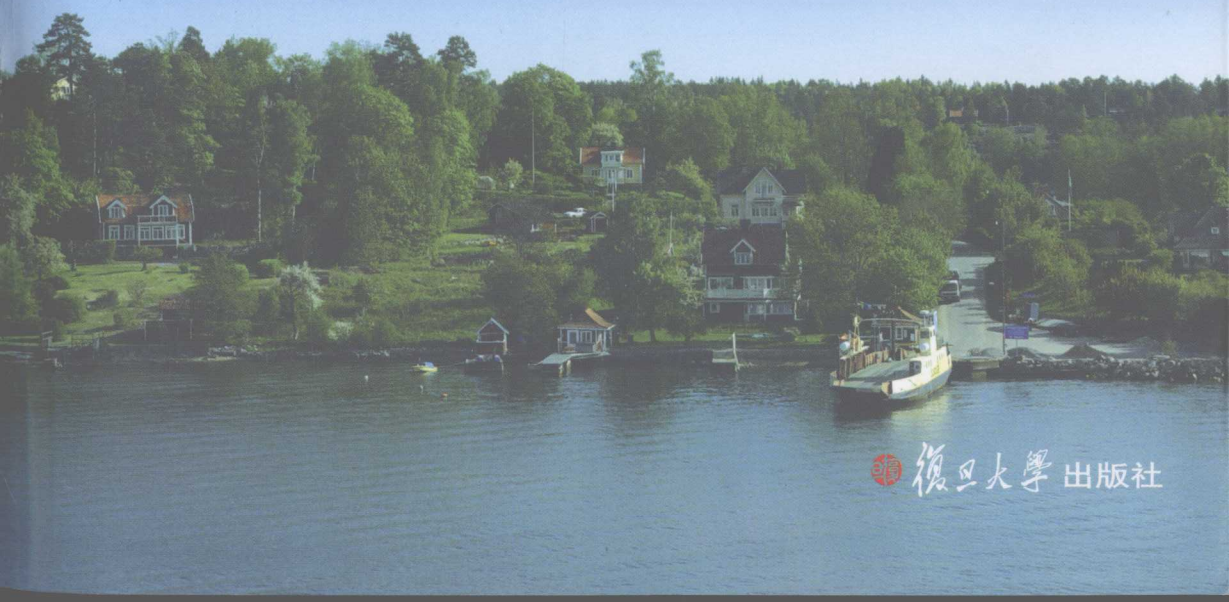
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主编



复旦大学出版社

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内容提要

北欧福利国家制度是北欧最鲜明的特色之一，这些福利国家成功地在经济发展与社会公正之间保持了相对平衡，并在国民的充分就业、社会保障、教育、平等、保护弱势群体等方面做得非常出色。它们的经验对许多国家具有重要的参考意义。

本书收录了十多位北欧国家从事福利国家研究的专家的论文，从政治学、社会学、历史学和经济学等多个视角，对北欧现行福利国家制度的发展脉络、“北欧模式”的主要特征和特色，及其当前和未来所面临的挑战，比较深入地进行了理论探索和评述。这些对正处于政治、经济、社会改革与转型的中国来说，无疑具有特殊的价值和启示意义。

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虽然出版本书的计划很好,但是如果没有以下机构和人员的全力帮助,我们永远不可能实现我们的目标。我们要特别感谢北欧研究基金会(Nordfonk)慷慨资助北欧卓越中心 Nordwel(北欧福利国家——历史基础和未来挑战),感谢 A·P·穆勒和贾斯丁·麦肯尼·穆勒基金会(A. P. Møller & Jeannette Mc-Kinney Møller Foundation)友善资助本书从英文译成中文并由复旦大学出版社出版。我们还要感谢各位同事愿意在极短的时间之内贡献他们在各自专业领域的专业知识。最后,我们还要感谢(南丹麦大学福利国家研究中心)的蒂娜·达瑞尔女士帮助我们对英文原稿进行编辑并准备附录中有关北欧国家的基本信息,感谢许辉芳女士统筹组织繁重的翻译工作和中文编辑工作。

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中国通常并不是北欧学者的市场。在中国出版一本有关北欧福利国家的综合性著作这样一种想法的产生,可以追溯到 2008 年。在北欧卓越中心 Nordwel 的一次研讨会上(在德国柏林赫尔梯行政学院举行),本书的三位北欧编者在讨论中提到,北欧方面对于与中国同行和研究机构开展更密切的学术合作的兴趣正在与日俱增。与此同时,一段时间以来,中国对北欧“福利模式”的学术和政治兴趣也明显日渐浓厚。那次讨论产生了要出版一部最高水平的综合性著作来介绍北欧福利国家的发展、现状和挑战这样一种想法。接下来的一步自然是与复旦大学北欧中心的陈寅章主任取得联系。他十分热忱地认可了这一想法,并欣然接受邀请,成为本书的编者之一。在他的支持下,本书得以赶在 2010 年 5 月北欧中心十五周年庆典之前出版。我们邀请了知名的北欧研究者们为本书撰稿,他们都毫不迟疑地接受了我们的邀请。复旦大学外事处的许烨芳和金莹两位女士则承担了将英文原稿译成中文的任务。

虽然出版本书的计划很好,但是如果没有以下机构和人员的全力帮助,我们将永远不可能实现我们的目标。我们要特别感谢北欧研究基金会(Nordforsk)慷慨资助北欧卓越中心 Nordwel(北欧福利国家——历史基础和未来挑战),感谢 A·P·穆勒和贾斯丁·麦肯尼·穆勒基金会(A. P. Møller & Chastine Mc-Kinney Møller Foundation)友善资助本书从英文译成中文并由复旦大学出版社出版。我们还要感谢各位同事愿意在极短的时间之内贡献他们在各自专攻领域的专业知识。最后,我们还要感谢(南丹麦大学福利国家研究中心的)蒂娜·达瑞尔女士帮助我们对英文原稿进行编辑并准备附录中有关北欧国家的基本信息,感谢许烨芳女士统筹组织繁重的翻译工作和中文编辑工作。

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2009 年 9 月

Acknowledgements

China is not the usual market for Nordic scholars. The idea to publish a comprehensive book in Chinese on the Nordic welfare states dates back to 2008. At a seminar within the Nordic Centre of Excellence *Nordwel* (held at the Hertie School of Governance in Berlin) the three Nordic editors discussed among many other things the growing Nordic interest in developing stronger academic cooperation with Chinese colleagues and research institutions. For some time it has also become evident that there has been a growing academic and political interest in the Nordic “model of welfare” in China. Out of the discussions grew the idea to publish a comprehensive state-of-the-art-introduction to the development, status and challenges of the Nordic welfare states. The next natural step was to contact Chen Yinzhang, the Executive Dean of the Nordic Centre at Fudan University. He enthusiastically endorsed the idea and gladly accepted the invitation to co-edit the volume. He has made it possible to publish the book in time for the celebration of the 15th anniversary of the Nordic Centre in May 2010. We asked leading Nordic researchers to contribute to the book, and without hesitation they all accepted the invitation. The final step of making the English manuscript into Chinese was laid in the competent hands of Yvonne Xu and Jin Ying at Foreign Affairs Office of Fudan University.

Although the book project as such has been entirely unproblematic to carry forward we would never have reached the goal without vital support from several sources: We want especially to thank the Nordic research foundation *Nordforsk* for their generous support for the Nordic Centre of Excellence *Nordwel* (*The Nordic Welfare State — Historical Foundations and Future Challenges*) and the A. P. Møller and Chastine Mc-Kinney Møller Foundation which kindly financed the translation from English into Chinese as well as supporting the printing of the book by Fudan University Press. A word of thanks also goes to our good colleagues

willing to contribute on a very short notice within their specific fields of expertise. Finally, we would like to thank: Tina Dreier (Centre for Welfare States Research, University of Southern Denmark) for crucial assistance on the editing of the English manuscripts and for preparing the appendix on basic information on the Nordic countries, and Yvonne Xu for organizing the laborious translation and Chinese editing.

September 2009

Berlin/Bergen, Shanghai, Odense and Helsinki

Stein Kuhnle, Chen Yinzhang, Klaus Petersen, and Pauli Kettunen

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序 Preface

北欧中心主任陈寅章教授嘱我为《北欧福利国家》中文版写序,深感荣幸。

北欧国家在任何意义上都代表着一种鲜明的模式,而福利国家是其最鲜明的特色。尽管它有局限性并面临着困难与挑战,福利国家保持经济发展与社会公正之间相对平衡的要义以及对充分就业、社会保障、教育、平等、保护弱势阶层等的重视,体现了好些人类崇高的向往。本书集中了一些积极从事福利国家研究专家的论文,是对北欧现行福利国家制度丰硕的理论思索和评述,对正处于政治、经济与社会改革和转型的中国,这些理论思索和评述所包含的经验与教训具有特殊的价值。

本书的出版还将令北欧中心的丰硕成果增色。作为北欧中心的早期成员,我见证了北欧中心自1995年成立以来15年间坚实的进展。对我来说,北欧中心很好地实现了它的使命:通过构建一个复旦大学与北欧大学间的学术交流平台,为增进各国人民之间的理解作出贡献。北欧中心已经建立了北欧研究的完整课程,获得了研究成果,积累了有关北欧的信息与数据,并积极开展了丰富多彩的其他活动。北欧中心还为我们提供了大学间成功合作的杰出范例。正因为如此,这一合作事业由最初的15个成员增加到目前的26个,并取得参与的大学和其他方面的支持,建造了北欧中心的大楼。我们可以相信,在新的十年中,北欧中心将攀登一个新的高峰。

戴炳然

识于2009年圣诞节前夜

Preface

When Prof. Chen Yinzhang, Director of the Nordic Centre, Fudan University, asked me to write a preface to the Chinese edition of the *NORDIC WELFARE STATES*, I felt more than honoured and pleased to comply.

The Nordic group of countries represents a distinct social model in every sense, welfare state being its most distinct feature. In spite of its limitations, difficulties, and challenges, welfare state, with its priority on a better balance between economic development and social justice and its emphases on full employment, social security, education, equality, assistance to the less-endowed, etc., enshrines many of the lofty human aspirations. Containing the contributions of a group of specialists active in the field, this book presents us a wealth of theoretical reflections, as well as appraisals, on the welfare state system practiced in the Nordic countries. To China, still in the process of political, economic and social reform and transition, the experience and lessons are of special and specific values.

The publication of the book also adds on the fruitful achievements of our Nordic Centre. As an early member of the Centre, I have been able to witness its steady progresses in the past 15 years since its launch in 1995. To me, the Centre has well fulfilled its professed mission to create a platform for academic exchanges between Fudan University and Nordic universities towards better understanding among our peoples. It has developed full courses on Nordic studies; it has supported and produced some research efforts; it has done a lot to accumulate Nordic information and data to support both teaching and research; and it is very active in organizing other activities. The Nordic Centre provides a unique example of successful cooperation between the universities. It is no wonder that the participants of the joint venture have increased from the initial 15 to 26 at the moment, and that it is able to enlist supports, not only from the participating

universities, but also from other quarters, to build a resident house of its own. It could be expected that in the new decade, the Nordic is yet to climb a new summit.

Dai Bingran

On 2009 Christmas Eve

When Prof. Chen Yushang, Director of the Nordic Centre, Fudan University, asked me to write a preface to the Chinese edition of the *NORDIC WELFARE STATES*, I felt more than honoured and pleased to comply.

The Nordic group of countries represents a distinct social model in every sense, welfare state being its most distinct feature. In spite of its limitations, difficulties, and challenges, welfare state, with its priority on a better balance between economic development and social justice and its emphasis on full employment, social security, education, equality, assistance to the less-endowed, etc., embodies many of the lofty human aspirations. Containing the contributions of a group of specialists active in the field, this book presents us a wealth of theoretical reflections, as well as appraisals, on the welfare state system practiced in the Nordic countries. To China, still in the process of political, economic and social reform and transition, the experience and lessons are of special and specific values.

The publication of the book also adds on the fruitful achievements of our Nordic Centre. As an early member of the Centre, I have been able to witness its steady progress in the past 15 years since its launch in 1995. To me, the Centre has well fulfilled its professed mission to create a platform for academic exchanges between Fudan University and Nordic universities towards better understanding among our peoples. It has developed full courses on Nordic studies; it has supported and produced some research efforts; it has done a lot to accumulate Nordic information and data to support both teaching and research; and it is very active in organizing other activities. The Nordic Centre provides a unique example of successful cooperation between the universities. It is no wonder that the participants of the joint venture have increased from the initial 15 to 36 at the moment, and that it is able to enlist supports, not only from the participating

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国际上对于“北欧社会模式”，抑或“北欧福利模式”，似乎有着与日俱增的强烈兴趣。这一甚为狭小的区域位于欧洲的最北部，共有约2 500万居民，包括五个民族国家，分别为挪威、瑞典、芬兰、丹麦和冰岛，它们成功地实现了社会发展，包括经济增长、稳定的民主政治、个体自由和全面的社会保障体系。诚然，大多数公民会强调这些国家并不是各方面都完美无瑕的社会，本书的很多章节也明显地反映了这一事实，但是通过国际比较可以看到，北欧社会一直都属于提供最高水平的社会保障和卫生及教育等公共服务的国家，并且其国民也以高度的人力、社会资本和幸福感为特征。不是自吹自擂，我们还是可以毫不夸张地说，这些国家肯定做对了一些事！我们的目的是为中国读者呈现北欧国家社会和政治组织中的一些关键因素。

本书的内容

本书的各章由来自政治学、社会学、历史学和经济学等各个学术领域的知名北欧学者撰写。这样广泛的代表性既反映了福利研究的领域是跨学科的，也说明所谓的“北欧模式”具有错综复杂的特征。要深入理解福利国家，不能仅从单独一门学科的角度切入。

本书的中心内容是当代北欧社会，但是为了充分理解当前的状况和未来的发展前景，我们还要介绍关于过去的可靠知识。本书的章节分成三个部分：第一部分论述的是各国福利国家的发展脉络和北欧社会政治合作的历

史;第二部分展现并分析“北欧模式”的一些主要特征和特色;第三部分探讨北欧福利国家赖以组织的方式在当前和未来所面临的挑战。

对于编者而言,要决定把哪些内容纳入本书又把哪些内容剔除出去,实属不易。我们最终选择包含那些我们发现最经常被认为——作为一个整体——构成北欧国家独特特征的几个方面。让我们列出本书中所涉及的一些最重要的问题和观点如下。

尽管这是第一次出版详细、全面地介绍北欧福利国家的中文译著,然而,关于一种特殊的“北欧模式”的概念则由来已久。虽然要为社会这一动态的存在寻找“源头”总是很难的,但是有关北欧社会模式的观念至少可以上溯到20世纪30年代,而历史前提则可以轻而易举地将我们带回到更远的时候。历史学家强调,国家文化、宗教(路德教)和地方行政传统等因素是20世纪逐渐形成的福利国家得到发展的重要前提。在前五章(第一至第五章)中,北欧的历史学家们概述了五个福利国家从19世纪晚期至今的发展脉络。本书的这一部分既提供了一种帮助理解北欧模式的年代性框架,也讨论了其发展背后的历史动力。这里一个重要的结论是,北欧模式不仅仅是面对结构发展和外部压力而自动产生的一个答案。相反,这些特殊的特征是在企图调节与缓和难以驾驭的市场力量所带来的残酷后果的政治雄心中产生的。由此,北欧福利国家也许可以被描绘成一种特殊的管制资本主义(regulated capitalism)。一方面是基于工业现代化的发展、充分就业和经济增长,另一方面是众多的社会服务、社会保障计划和政治妥协,这些都被引进到北欧各国,以对这一现代化发展的结果实行控制。从20世纪三四十年代开始,这一发展往往被贴上“第三条道路”的标签,介于资本主义和社会主义之间。我们固然可以讨论这两者之间的平衡点(来自这两个政治派别的批评家同时将北欧福利国家描述成资本主义或社会主义),不过,福利国家的发展在很大程度上是基于广泛的政治妥协之上的。虽然福利国家体系的发展是在民族国家的框架下发生的,然而,“北欧”这一概念很早就已颇具影响力。历史部分的最后一章(第六章)分析了北欧各国间密切的政治合作如何影响了它们之间非常相似的福利政策的发展,以及围绕一种特殊的北欧福利模式而形成的一种共同身份。前五章关于历史的章节每章分别讨论一个国家,而第二部分关于对北欧模式主要特征的探讨则是比较性的。所有的章节都涉及几个——如果不是所有的——北欧国家,并且旨在同时对整体趋势和各国差异进行讨论。

首先,很多文章论述了从这五个国家中挑选出来的一些特殊福利政策的特征。这其中包括一篇关于普遍主义原则和实践的文章(第七章),普遍主义