
The Democratic Social Developmental State

Parameters of the Possible in the Global South

ABSTRACT Colonial legacies and the structural constraints of global capitalism pose significant obstacles to building welfare states in the Global South. Yet the past three decades have seen significant progress. In contrast to the literature on northern welfare states, the task of typologizing welfare states in the Global South is in its infancy, made all the more difficult by dramatically different conditions from first-generation welfare states and much greater variation. This paper proposes some broad typologies, but then draws from the cases of Brazil, India, and South Africa to examine the specific type of the democratic social development state. Driven by democratization and new state capacities, the focus on social development is rooted in a rights-based framework and made possible by embedding the state in civil society. **KEYWORDS** Welfare states, democracy, social development, civil society, inequality

The challenge of tackling poverty in all its complexity in the Global South is daunting. For sociologists it is especially challenging because we are often conflicted between our impulse for deep critique and the urgency of pragmatic solutions (Prasad 2021a). In recent decades, much of the debate on development in sociology has revolved around the questions of neoliberalism and globalization (Harris and Scully 2015), as well as more recently the legacies of colonialism and the ongoing effects of empire (Go 2016). In the current structural phase of global capitalism, the increased dominance of financial capital and the acceleration of labor-displacing technologies would appear to make the challenge of tackling poverty in the Global South insurmountable.¹ Against the backdrop of a dramatic crisis of democratic institutions and the rise of reactionary coalitions, all of this looms like a coup de grâce.

But succumbing to the pessimism of structural accounts of capitalism risks eliding the very substantive transformations that have occurred over the past two to three decades in the Global South, namely the consolidation of new democratic state capacities capable of directly confronting social and economic maldistribution. First, the third democratic wave (1974–1994) has seen many postcolonial societies transition to democracy, which in many cases has opened up new avenues for subordinate-group mobilization and ushered in new institutions through which citizens can engage the state (Baiocchi, Heller, and Silva 2011; de Sousa Santos 2005; Roberts 2016). Second, many of these democracies (as well as some authoritarian regimes²) have become more responsive to popular demands and have responded by significantly expanding social programs and even pursuing redistributive

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reforms. Both these developments underscore the need to develop a better understanding of the “parameters of the possible”—that is, the range of politically viable state-mediated interventions that can overcome the legacies of colonialism and dependency as well as the social challenges of the post-industrial stage of economic transformation.

I want to explore these interventions at a general and at a more specific level. At a general level, over the past two decades most of the Global South—with the notable exception of many Sub-Saharan African countries³—has made significant progress in tackling poverty and improving a range of social indicators, a surprising trend against the backdrop of a seemingly inexorable march toward global neoliberalism interrupted only by the 2008 financial crisis and the COVID pandemic. While talk of a complete break with the distributive logic of capitalism would be overstated, it is clear that there has been a significant shift in the scale and configuration of the welfare state. Seekings (2012:14) notes that at the end of the last century, “the dominant trend in welfare reform in the ‘developing’ countries of the ‘global South’ was the ‘neo-liberal’ shift associated with the Chilean model.” Under the structural adjustment policies of the 1990s, many Global South countries, especially in Africa, cut social expenditures and food subsidies and introduced user fees for primary health care, leading to an overall decline of social indicators (Walton and Seddon 2008). Yet by the second decade of this new century a range of scholarship, from case studies to comparative work to global data-collection exercises, had demonstrated a sharp growth of welfare policies in the Global South. Cross-national studies have shown a dramatic expansion of state-financed social programs (Barrientos 2013; Kevan and Scully 2015). In Latin America, since the 1990s, social programs and protections once limited to the upper and middle classes have been dramatically expanded (Garay 2016; Huber and Stephens 2012). And maybe most dramatically, East Asia and South Asia have witnessed the rise of a variety of welfare regimes (Chiriyankandath et al. 2020; Tillin 2025; Wong 2004).

More specifically, while some have pointed to a broad pattern of a Polanyi-like countermovement to neoliberalism (Burawoy 2003; Kevan and Scully 2015) and “forms of social protection that constitute a substantial de-commodification of daily life” (Kevan and Scully 2015:416), it is important to recognize and analyze the variety of actual welfare policies and interventions that are emerging, as well the distinct political and institutional factors that have shaped these outcomes. In contrast to the European literature that has produced extensive empirical assessments and robust conceptual typologies of welfare states (most influentially Esping-Anderson 1990), a similar effort for the Global South is only beginning to take shape.⁴ This is a monumental project that calls for extensive and detailed comparative work and careful contextualization. In this paper I offer only suggestive, broad-stroke typologies before focusing on one particular type, the democratic social developmental state.

TYPOLGIZING WELFARE STATES

The dominant explanatory framework in theorizing different patterns of welfare state formation in advanced capitalist countries has been power resource theory, which focuses

on the organizational power of the working class (Huber and Stephens 2001; Korpi 1983, 2006; Rueschemeyer, Stephens, and Stephens 1992). These comparativists have explained the differences between the liberal (means-tested), Christian democratic (family oriented), and social democratic (universalistic) variants of the welfare state by focusing on the timing and extensiveness of lower-class formation and demand-making. This approach has, among other things, pointed to both civil society and democracy as critical conditions for collective action by subordinate groups. More recently, power resource theory has been challenged by institutionalist arguments focusing on the history of state formation as critical to shaping welfare outcomes (Iversen and Soskice 2009; Rothstein, Samanni, and Teorell 2012; Skocpol 1995).

The complexities of these debates aside, it is important to point out that these contending explanations are hardly mutually exclusive: early state-building in the pre-democratic period was characteristic of the most comprehensive welfare states (Scandinavia), but without the formation of broad-based working-class demands, the welfare state would not have grown to be as encompassing. In contrast, Skocpol's (1995) argument that it was the early development of a patronage-driven welfare state in the U.S. that pre-empted the formation of a more comprehensive welfare state also explains the weak impulses of working-class political formation. As Rothstein, Samanni, and Teorell (2011:7) note, "Welfare states are complicated systems and therefore not easy to theorize in 'toto.'" Though the deep historical patterns through which state formation and lower-class demand-making evolve and interact are highly variable, it is clear that where they coincide—that is, when a high-capacity state is accompanied by high levels of lower-class mobilization—welfare states are more expansive. For the purposes of understanding how democracy can facilitate redistributive politics, Przeworski's (1985) class compromise model, which rests on the Gramscian idea that labor's interest in redistribution and capital's imperative to accumulate have to be carefully coordinated, integrates both perspectives. On the one hand, the nature of state power (its overall capacity and its political character) shapes the possibilities of lower-class demand-making and is critical to underwriting coordination capacity. On the other hand, without the formation of lower-class demands, there is little scope for the kind of organized class compromise that makes programmatic social policies possible and sustainable.

While this debate is analytically very useful in explaining welfare states in the Global South and has informed some of the most important comparative contributions (Haggard and Kaufman 2008; Huber and Stephens 2012), it has clear limitations because of the historical timing and structural effects of capitalist development, most notably the fact that European industrialization was predicated on colonialism and in turn shaped the conditions for development in the Global South.

Drawing on the literature it is possible to identify five broad regional patterns across the Global South that closely align with patterns of colonialism, as well as some distinct outliers. A first pattern is represented by what were in effect precocious cases, that is, a first generation (roughly 1960s) of agrarian social developmental states: Costa Rica, the Indian state of Kerala, Sri Lanka, and Mauritius. These bear emphasis because as much as they were deeply marked by colonialism, they also broke dramatically with the structural

constraints of dependency. Indeed, as Sandbrook et al. (2007) argue, these were exceptions of a general type—exceptional within their regions, but of a shared “social democratic” type across continents. Going beyond Drèze and Sen’s (1989) original interpretation of these cases, which simply points to effective “public action,” Sandbrook et al. show that despite low economic development and acute commodity export dependency they succeeded in implementing basic social development reforms, largely on the strength of middle peasant and emerging working-class alliances. All four were comparatively small and well-consolidated nations (or had a strong subnational identity, in the case of Kerala—Singh 2015), and their respective colonial experiences generated unusually strong politically constructed lower-class solidarity. In many respects these were precursors of the democratic social development state.

The second pattern is East Asia, which itself can be roughly divided into two subvariants. Among the states that can be classified as developmental (Malaysia, Singapore, China, South Korea, and Taiwan), strong early state and national consolidation, either through occupation or revolution, and marked by clear and decisive ruptures with the *ancien régime* (and especially the power of landed elites), set the stage for the emergence of authoritarian developmental states which were highly successful in accelerating export-led industrialization (Kohli 2009). Fueled by wage repression in their early stages, dramatic economic growth and structural transformation, led by labor-intensive manufacturing, resulted in the incorporation of most of the labor force in a modern, export-led capitalist economy. Welfare was initially limited to controlling strategic sectors (military and public employees) and mass primary education (Amsden 1989). Democratization in South Korea and Taiwan led directly to welfare expansion, driven by both increased political competition and popular mobilization and facilitated by a high-capacity state (Haggard and Kaufman 2008; Wong 2004). The pattern here has strong parallels to the European case. In Singapore and Malaysia, early welfare reforms were initiated during democratic interludes but have since been expanded by dominant authoritarian parties leveraging their inherited strong state powers to “check the considerable combined threat posed by communalism and the radical Left” (Slater 2012:2). Though China has had no such democratic interlude, the Chinese Communist Party came to power on the strength of lower-class mobilization and as an institutional actor has long been concerned with popular incorporation. The key scope conditions across these cases were consolidated and authoritarian nation-states—what Slater calls the “extraordinary strength of the state apparatus”—and their labor-repressive export success as a precondition for broader-based social development.

Latin America represents a third, and quite distinct, pattern of welfare state formation. Comparatively early but elite-driven independence movements led to some progress in welfare expansion, though both social insurance and basic public services were initially limited to the middle class and then extended to a narrow but state-organized segment of the working class (Collier and Collier 1991). Pressures for welfare expansion from excluded groups—peasants and informal workers—triggered authoritarian responses in the 1960s in most of the continent, but especially the Southern Cone. This exclusionary lock-in was only dislodged in the 1980s’ wave of democratization, which itself was

a response to the economic stagnation and increasing inequality of the late 1970s and 1980s. Left-of-center parties started coming to power in the so-called Pink Tide of the late 1990s (Roberts 2016), and social programs that had started in the early redemocratization period were ramped up in the 2000s. In contrast to East Asia, welfare expansion was based on the simultaneous processes of state capacity-building and democratization.

In Sub-Saharan Africa, states' weakness and postcolonial dependency remain powerful barriers to expanding their capacity to support welfare.⁵ Some recent advances in democratization have led to a modest expansion of social-assistance programs, but party systems that are "fragmented, weakly institutionalized and patronage-based" have limited the emergence of broader welfare policies (Niño-Zarazúa et al. 2012:170). South Africa is an exception because it has developed deeper forms of democracy through the anti-apartheid movement and has inherited a high-capacity state and a more generous economic base (though one still marked by deep structural inequalities).

Finally, the general verdict is that South Asian states have made modest progress at best in building welfare capacity (Kerala and Sri Lanka have remarkably better records), despite accelerated economic growth since the 1990s. South Asia stands out for its high population density, deeply etched local patterns of social and land inequality, and weak state formation (Evans and Heller 2019). In the postcolonial period, outside of India, authoritarianism has clearly been a constraining factor, with landed and commercial elites, supported by powerful militaries, largely monopolizing the state (Tudor 2013). In India, the military was neutralized, and competitive elections have been the norm, but electoral democracy had a limited impact on social policy and distributive outcomes through the 1980s. The Indian National Congress party successfully sustained a hegemonic social bloc of propertied classes (Bardhan 1983) that secured electoral support through selective patronage but otherwise never extended social protection beyond the middle class and a very small, organized working class (Tillin 2025). This changed in 2004 with the advent of the United Progressive Alliance government (discussed below), which significantly built out welfare programs and invested in expanding national and local state capacity.

Moreover, starting in 2008 Pakistan rolled out a noncontributory cash transfer program (the Benazir Income Support Programme), which has had measured success in reducing poverty and empowering rural women (Jamil 2022). Bangladesh has also made some quite remarkable progress in social development indicators, but this has been driven more by a dense NGO sector, extensive networked local-level interventions, and women's agency, in a pattern that defies simple categorization (Kabeer 2024). Overall, then, there has been moderate progress in South Asia, in large part driven by new ideas and policy frames tied to the social development paradigm of welfare, but progress has been far more robust where deeper forms of democracy have emerged.

Because it is not possible to develop these categorizations more fully, my goal instead is to (a) identify the specific circumstances of development in the postcolonial world that have shaped patterns of welfare formation that are distinct from the classic European welfare state, and (b) explore and conceptualize in general terms some of the new patterns of state social intervention in the Global South. In the process I will draw on the cases of

Brazil, India, and South Africa to propose at least one new welfare-state typology, the democratic social developmental state (DSDS).⁶

There are four elements of the DSDS that distinguish the type. The first is the generative and direct impact of democratization, and specifically the mobilization of a range of civil society actors. Civil society actors can have an impact in less democratic and even authoritarian cases,⁷ but in fully constituted liberal democracies they enjoy significantly expanded possibilities for mobilizing popular support and engaging the state. The second is a focus on social development as an explicit strategy for incorporating historically excluded groups and for directly challenging the durable effects of social hierarchies. The social development framework has redistributive effects, but the focus is quite distinct from the classic organized class-compromise thrust of the European welfare state. The third is the expansion of state capacities, which, beyond the classic element of strengthening institutional capabilities, is also tied to embedding the state in civil society. Finally, all of these elements are conjoined by the specifically rights-based nature of provisioning under the DSDS.

These DSDSs have emerged in different continents and against different postcolonial histories, but they share structural economic constraints and comparable institutional and political features. A range of cases fit the general category, including earlier examples of democratic and welfare success in the Global South such as Costa Rica, Sri Lanka, Mauritius, Uruguay (Drèze and Sen 1989; Sandbrook et al 2007), Trinidad and Tobago (Edwards 2025), and the Indian states of Kerala and Tamil Nadu, as well as the more recent case of Colombia. In this paper, however, I focus on Brazil, India, and South Africa, for two reasons. First, these three countries are especially unequal: they inherited some of the deepest and most durable forms of income and categorical inequality anywhere in the developing world. All three transitioned to democracy at a time when they had grotesquely unequal land distributions, labor-repressive agrarian economies, and extreme income inequality.⁸ South Africa and Brazil are arguably the most racialized societies in the world, and the Indian caste system is probably the oldest and most decentralized system of organized and ritualized human inequality ever devised. Given the enormity of the challenge of deepening democracy against the backdrop of perverse inequality, they all stand as the least likely cases of success.

Second, all three are democratic but highly conflicted: they have had long, unifying, and densely organized democracy movements but have also produced democratic regimes marked by highly contested relations between political parties and civil society. These challenges notwithstanding, all three have distinct elements of the DSDS. Brazil is closest to a prototypical case; South Africa has had a more mixed record; and India has experienced sharp cycles of progress and reversal, as well as extremely wide subnational divergence.

New Forms of State-Led Social Development in the Twentieth Century

Three broad structural features distinguish the Global South from the European experience. First, in Europe, state formation, including the development of significant infrastructural power, preceded the development of an industrial economy. But in the

Global South (except for parts of East Asia), state formation that goes beyond coercion and extraction only really begins after the formal end of colonialism. This includes the particular challenge of overcoming the legacies of highly authoritarian forms of local government that were critical to the colonial project, what Mamdani (1996) has called decentralized despotism. The process of state formation and especially development of the capacity to extend the legal and authoritative power of the state has been the Achilles' heel of development (O'Donnell 1993). States that are institutionally weak and highly clientelistic have led many commentators to doubt the possibility of building effective welfare policies in the Global South (Rothstein, Samanni, and Teorell 2012; Rudra 2004; Weyland 1996). But while this institutional legacy is real, the path-dependent versions of the argument in the postcolonial literature elide the possibility of political transformation. As I will argue, democratization in the 1990s has triggered significant expansions of state capacity as well as demand-making from below.

Second, the material base of the European welfare state was made possible by the political formation of the working class and the significant surpluses available for taxation and redistribution that came with early industrialization and colonial extraction.⁹ In the Global South, welfare policies have their roots in agrarian societies (Seekings 2012) and were largely limited through much of the twentieth century to providing social insurance to a small middle class and an organized working class. Dominant economic models, embraced by international development organizations, long argued that welfare could only be expanded after sustainable growth had been secured, culminating in the neoliberal policies of the 1980s that saw dramatic cuts in social spending, especially in Africa and Latin America.

Third, outside East Asia, colonial legacies combined with dependent development have created patterns of economic development that have been highly exclusionary, marked most notably by the resilience of a large informal sector, or what, following Singer (2012), is more accurately described as a subproletariat.¹⁰ In Esping-Andersen's terms, if Europe faced the challenge of decommodification, states of the Global South still have to deal with a labor force that has yet to be fully commodified.

Compared, then, to the concerted and programmatic build-out of the European welfare state, orchestrated by a highly consolidated state in response to well-organized lower-class interests, the expansion of welfare in the Global South has been much more piecemeal, but also more multipronged. Understanding its formation requires recognizing that it has simultaneously tackled extreme poverty (those living on the edges of subsistence), patterned exclusions, and the problems of a bifurcated capitalist labor market. Politically, it has also had to overcome the institutional inertias and resistance of the privileged classes and sectors that were incorporated in the immediate postcolonial welfare model, not only commanding the lion's share of social expenditures but also monopolizing collective goods such as education, health, formal urban housing, and services.

Responding to similar structural and institutional legacies, but in the context of highly varied political transformations, the forms of welfare that have emerged are highly uneven. Yet it is possible to identify two quite different types of intervention that are

consistent across cases. The first is the expansion of direct cash or material support, as in conditional cash transfer programs or the provision of subsidized goods such as food. Harris and Scully (2015), building on a database initially developed by Barrientos (2013), show that the number of flagship social assistance programs across 84 countries went from less than 10 in the 1970s to over 140 in 2012, with a steep acceleration starting in 1995. The World Bank (2025:1) now estimates that 4.7 billion people in low- and middle-income countries are covered by social protection programs. Unlike the social insurance programs of Europe, which were predicated on work and the male-breadwinner model, most of these programs directly target the poor or the marginalized, and often specifically women. And rather than de-commodifying, in the strict sense of making recipients less dependent on market forces, the programs are geared to enhancing household autonomy, including the ability to invest in basic capabilities (health or education), leverage basic consumption, and participate in the formal labor market or support micro-enterprises. (Indeed, this market orientation has led some critics to characterize these social programs as a form of neoliberal capture).¹¹ The distinction from Europe makes sense only if one bears in mind that vast sectors of the labor force are not incorporated into the formal capitalist economy.

The second intervention can be described as democratizing access to basic services and collective goods. This has included expanding basic health care through direct provisioning (not insurance), education, extending basic services such as water, sanitation, and electricity to the rural and urban poor, expanding public transportation, and providing new housing or improving existing housing.¹² Beyond allocating resources, this calls for more complex interventions that require coordination across line departments, investing heavily in front-line bureaucracies, and in many cases, significantly increasing the capacity and authority of local government. Progress here has been strikingly consistent across a wide range of cases and is reflected in dramatically improved basic indicators such as greater primary school enrollment and rapidly declining child mortality (Global Partnership for Education 2024; UN IGME 2024).

But this democratization of access to collective goods has not just been about expansion. It has also meant opening up highly rationed elite institutions—most notably higher education—to historically marginalized groups. Here success has been more halting, in no small part because it has often invited fierce resistance, as when higher castes in India mobilized in opposition to the expansion of higher education quotas for Other Backward Castes. But there have also been successes, as in Brazil's race- and class-based quotas for higher education and the significant racial integration of higher education and the bureaucracy in South Africa.

New services and expanded access to collective goods have been accompanied by significant institutional reforms and capacity-building. Reviewing the literature, one is struck by the extraordinary heterogeneity of state forms—in the sense of new agencies or institutions—as well as the reconfigured state–society relations this has entailed. Alongside a traditional literature that has long seen bureaucracies in the Global South as corrupt, predatory, colonial, patrimonial, or captured by society (Bratton and van de Walle 1994; Mamdani 1995; Migdal 1988), there is a large body of newer work that

points to uneven but incremental improvements of state capacity, as well as the creation of innovative policy instruments and vehicles for delivery. This wide and diverse literature can be roughly classified into three clusters. One set of studies builds on the East Asian literature on “pilot agencies” and identifies strategic state sectors or bureaucracies that have emerged as islands of efficiency, populated by highly effective and committed officials (Gibson 2018; McDonnell 2017).¹³ A second body of work shows that some policy arenas or domains have taken the form of institutionalized interfaces and joint policymaking between state agencies and organized civil society (Abers and Keck 2013; Adhikari and Heller 2024; Gomide and Pires 2014; Lavalle and Swako 2015). The third is a rapidly growing body of research on front-line bureaucracies, showing in many cases that local state actors, ranging from the “activist” lawyers of Brazil’s *Ministerio Publico* to childcare workers in Chennai (India), have become more engaged and responsive, and in some cases have even developed flexible, problem-solving capacities (Mangla 2022; Pires 2011; Zumblyte 2023).

This literature on state institutional reform has become all the more important and complex given that many emerging welfare regimes have been built on the strength of significant decentralization reforms, which has only increased the importance and impact of novel forms of multilevel governance (Bichir et al. 2025; Bradlow 2024; Mangla 2022; Veeraraghavan 2021). The degree to which decentralization reforms have given local (municipal and rural) governments more resources and power to actually develop and implement policies goes a long way in explaining success. Most dramatically, the municipalization reforms introduced by the 1988 Brazilian constitution have equalized resource distribution across localities and underwritten the greater efficacy of social developmental interventions (Abers 2000; Arretche 2016). This is in striking contrast to India, where the lack of resources and authority at the municipal level continues to be major bottleneck for basic services and housing development (Heller, Swaminathan, and Varshney 2023; Sivaramakrishnan 2015).

The reforms just described cut across a range of regime types. What distinguishes the DSDS typology is its rights-based framework. If European and early postcolonial welfare regimes served workers and peasants (Seekings 2012), the DSDS serves citizens. On the one hand, social development has been defined as a right, breaking explicitly with the corporatist and patronage logics of the past. On the other hand, social development has been explicitly justified not just in terms of capability-enhancing investments (for example human capital) but also as a means to dismantle traditional sources of categorical inequality such as race, caste, ethnicity, and gender. This framing is explicit in the Brazilian and South African constitutions, and in the Brazilian case all major welfare initiatives have been specifically legitimated in the language of rights and accompanied by robust judicial enforcement. In South Africa the ruling ANC has been more hesitant to embrace rights-based justifications, preferring the language of the “developmental state” and job creation rather than welfare (Osborne 2024).¹⁴ But the courts and a vibrant professional civil society sector have aggressively pushed rights-based policymaking, especially the expansion of social grants. The Indian constitution relegated social rights to non-justiciable “directive principles,” but civil society mobilization and a “second

democratic upsurge” of rising regional and lower caste parties in the 1980s (Yadav 2000) began to shift policy discourse from the paternalistic logics of “upliftment” and “poverty relief” to a citizenship framing, culminating in the rights-based welfare legislation enacted by the United Progressive Alliance (UPA) in 2004–2014.

The relative novelty of the DSDS is rooted in larger processes of democratization that saw a significant expansion of state capacities and a fundamental reconfiguration of state–society relations. Theoretically, we can extend Peter Evans’s work on the twenty-first-century developmental state to argue that DSDSs enjoy some degree of basic bureaucratic capacity, as well as some autonomy from organized interests, but are distinguished from their twentieth-century counterparts by the extent to which they have become embedded in civil society rather than just the business community (Evans and Heller 2015).¹⁵ This embeddedness has not only thickened accountability beyond political representation but has also enabled deeper and more extensive forms of co-production in the design and delivery of welfare (Cueto 2025; Marques and Bichir 2023).

The contours of the DSDS in terms of its policy cohesion, scope, and impact are highly varied, with Brazil representing a far more robust version than either South Africa or India, but that variation itself can be traced back to historical patterns of how the state become embedded in civil society (Heller 2019). In Brazil it has been an iterated pattern that started with a mass-mobilization phase of civil society demands for access and participation in the 1980s, leading to a high degree of institutionalized engagement across many policy sectors, especially those dealing with welfare (Abers 2007; Lavalle and Swako 2015). In South Africa, a similar phase of civil society mobilization during the anti-apartheid movement drove not only the democratic transition but also the creation of new state structures and processes designed to institutionalize participation. But the dominant party nature of the ANC (which handily won all national elections until 2024) allowed it to effectively contain civil society and hollow out participatory structures in the immediate post-transition period. While more professionalized segments of civil society have continued to engage with policy, especially in expanding social grants and basic health care, other areas of delivery are firmly under the control of patronage interests, especially at the municipal level (Brunette 2025; Olver 2017).

In India, policymaking since Independence has been firmly in the grip of political parties, which have ruled at the national and state levels by cobbling together narrow sectoral interests and caste-based coalitions. The result has been a proliferation of election-cycle-driven and narrowly targeted anti-poverty or community-development programs that have been subject to a high degree of leakage.¹⁶ Civil society organizations have been active, especially since the 1980s, but mostly limited to influencing subnational (state) policies. The turning point came when the social development faction of the Indian National Congress party in the UPA government empowered a coalition of civil society organizations that had been advocating for rights-based policies on the ground for two decades to develop welfare legislation.¹⁷ The result was the Right to Information Act, the expansion of the public food distribution system, the National Rural Employment Guarantee Scheme (NREGA), the universalization of primary education, and the introduction of new primary health delivery programs. The impact has been significant

(Tillin 2025), though deeper and more comprehensive implementation has been limited by political bottlenecks.¹⁸ As much as civil society organizations were instrumental in expanding the welfare state, without deeper linkages to mass organizations (as in the case of Brazil) their success in sustaining pressure on the state has been very uneven (Adhikari and Heller 2024).

To be clear, compared to European welfare states that were built on the dual strength of encompassing working-class political formations and institutionalized state capacities, the DSDS is much more fragile, fueled by relatively recent reconfigurations of political alignments and transformed state–civil society relations. The processes of state capacity-building have accelerated in the democratic period but are subject to reversal, as in the “state capture” period under Zuma in South Africa (Buthelezi and Vale 2023), Bolsonaro’s ultimately failed efforts to retrench the Brazilian state, or Modi’s project of techno-neo-patrimonialism (Aiyar and Sirar 2024). In all three cases, the social blocs that underwrote the expansion of the social developmental state were complex alignments of popular and middle classes, sutured together more by an emergent social rights compact that emerged from a range of civil mobilizations than by the highly coordinated class compromises that defined the European welfare state (Przeworski 1985). Most problematically, these emergent DSDSs have invited a backlash from economic and social elites defending their traditional privileges (addressed in the last section of this paper).

Parameters of the Possible

Reviewing the literature, we can draw out some critical lessons and future research challenges in making sense of these developments. A first critical lesson is that over the past three decades or so we have learned a lot about what states in the Global South can do to reduce poverty and enhance social capabilities. For a long time, the debate on development was trapped in the dead end of zero-sum views of growth and equity. But since the end of the twentieth century there has been a clear break with the growth paradigm that dominated development thinking through the 1980s. Outside of East Asia, growth-focused policies from import substitution industrialization to neoliberalism failed to overcome the structural obstacles to developing more dynamic and inclusive economies. Industrialization peaked in the early 2000s and has been retracting since (Rodrik 2016). Income inequality has been obstinate and has been rising in many countries of the Global South, even as intercountry inequality has been reduced by India and China’s accelerated growth. Precarity has increased with heightened global competition and outsourcing, and even when growth rates were robust, as in India, low-wage, low-skilled employment has remained predominant.¹⁹

This triggered sharp political responses, as in the Pink Wave in Latin America, waves of service-delivery protests in South Africa, and the United Progressive Alliance in India (2004–2014). Governments across the Global South began to push back against growth orthodoxy and to look for ways to address economic and social exclusion more aggressively (Kevan and Scully 2015). These developments were also reflected in academic writings, including the increasing concern among development economists (Dani Rodrik, Francis Stewart, Elinor Ostrom, Pranab Bardhan, Amartya Sen, Mahbub ul Haq, Jean

Drèze, Celia Kerstenetzky, Abhijit Sen, Esther Duflo, Joseph Stiglitz) that without more direct interventions growth alone would not support social development. Sen's (1999) influential arguments about development as capability enhancement even spread to the World Bank, which in its annual report (2003) argued that inequality is an obstacle to growth and made the case for shifting from growth-led development to social-investment policies.

The case for social development, or, as Drèze and Sen first articulated it, "support mediated security" (as opposed to growth-led security), was first made on the strength of lessons from East Asia, but also from other cases such as the states of Kerala and Tamil Nadu in India, Costa Rica, and Mauritius. The central claim was that early investments in health and education have huge payoffs (Drèze and Sen 1989; Haggard and Kaufman 2008; Kalaiarasan and Vijaybaskar 2021; Sandbrook et al. 2007). Such early investments are labor-intensive, requiring mostly nurses and primary school teachers, and in labor-surplus economies investing in labor is cheaper than investing in capital goods. Moreover, investing in these basic capabilities has a multiplier effect, by increasing participation in political and economic life (Sen 1999)—so much so that the long-held view in economics that growth drives social development has now been turned upside down (Evans 2014). The econometric evidence that early social investments increase productivity and economic growth is significant, though clearly mediated by other factors (Barro and Lee 2015; Gustav and Stewart 2007; Suri et al. 2011). The failure of South Asian countries to invest in primary education, in contrast to early investments in East Asia, provides the strongest comparative evidence for the link between human capital formation and manufacturing export success (Bardhan 2010). Most recently, drawing on the Brazilian case, Kerstenetzky (forthcoming) makes a case for how the extension of social services can promote structural transformation, including generating forms of employment that are more equitable and green and expanding the share of economic activities that are in the public sector.

In this respect, the experiences of the Global South converge with the central claims of endogenous growth theory in economics. The nexus between social investment and productivity gains becomes even more direct as we transition into a knowledge-and-information-based economy where it is returns to intangible assets such as skills, innovation, and organizational capacity that drive growth (Cimoli, Dosi, and Stiglitz 2008; Evans and Heller 2015). Investing in education not only increases overall productivity but also reduces inequality.

Reviewing data from Latin America, Huber and Stephens (2012:9) find that after the education expansions of the 1990s, the skill premium—a significant source of inequality—actually shrank and led to a decline in labor income inequality. Overall, Huber and Stephens find that investments in education and health are quite redistributive, especially when compared to traditional social insurance programs. For Brazil, Arretche (2016) shows that constitutionally mandated federal transfers to municipalities for health and education have reduced territorial inequality. A large and diverse literature also shows that relatively low-cost investments in primary public health care have significant returns. McGuire (2010) shows that across East Asia and Latin America, expansion of basic

health care had more to do with declining premature mortality than with growth rates. The Brazilian case underscores the high return to labor-intensive health delivery. Guanais and Macinko (2009) show that between 1998 and 2006 post-neonatal mortality fell by half largely because of the expansion of local primary health care, and that of a wide range of factors, including increased expenditures per capita and improving literacy, by far the two most significant were the expansion of local coverage under the family health program (PSF) and the greater number of community health workers (see also Macinko and Harris 2015). The regional effects are remarkable. In 1990 the northeast had an infant mortality rate of 75.8 per 1,000 compared to 28.3 in the south (the wealthiest and most European part of Brazil), but by 2010 it had fallen to 19.1, compared to 11.6 in the south (Wampler, Sugiyama, and Touchton 2020:139).

Strategies for enhancing capabilities and social investment depend on effective policies and expanded capacities for delivery. To some extent, this in turn requires traditional expansion of state capacity, in the conventional sense of more trained personnel and public resources. But as Rothstein, Samanni, and Teorell note, the welfare state is a “mega-sized collective action problem” that, beyond capacity, also requires highly tailored forms of intervention and coordination. This leads to a second set of observations about institutional and political transformations which have underwritten experimentation with highly innovative policies to tackle poverty and precarity across many Global South countries. These innovations are as varied as improving service delivery to slums (Bremer and Bhuiyan 2014; Cueto 2025; Marques 2021), new cooperative forms of social housing (Duquette 2005), welfare schemes for informal-sector workers (Agarwala 2013), grassroots programs for pedagogical reform (Banerjee et al. 2016; Benveniste and McEwan 2000; Tarlau 2019), and new, low-cost ways of delivering basic health care (Gibson 2018; Nandi and Schneider 2014; Tandler 1997). The focus in all of these policies on working closely with communities and developing dynamic feedback loops points to a logic of deliberative and pragmatic problem-solving (Prasad 2021b) that can complement more traditional approaches to policy reform.

One of the most consequential policy innovations has been the rise and the wide diffusion of conditional cash transfer and work programs (Ferguson 2015). We now have clear evidence that programs as diverse as Bolsa Família in Brazil, social grants in South Africa, NREGA in India, and the Benazir Income Support Programme in Pakistan reduce poverty and provide a vital social wage. In what Ferguson (2015) calls a new “politics of distribution,” these programs generally target cash transfers or social grants to households near or below the poverty line. Thanks to NREGA, nearly 150 million workers receive above-average wages, with a day’s work estimated to provide food security for a family for a month (Adhikari and Heller 2024:4). Both the old-age and child grants in South Africa have grown steadily in support level and coverage since independence. Over 47% of South African households receive social grants, and Van Der Berg et al. (2010:54) find they have had a “significant mitigating impact on poverty.” Bolsa Família is arguably the most carefully tracked and monitored program of its kind, and a large literature has documented its positive impact on social development and poverty reduction (de Souza Leão, forthcoming).²⁰

The success of these programs lies in highly innovative strategies for identifying recipients and the development of complex accountability and data-collection systems (de Souza Leão, forthcoming; Graizbord 2024; Veeraghavan 2021). The positive spillover effects are dramatic: for a public expenditure that in most cases is well below 1% of GDP, the poor are provided a basic wage that empowers households to invest in education or health care.²¹ In a global economy where labor-displacing strategies are increasingly dominant, it is more important than ever to ensure that laborers that are unemployed or in the informal sector are provided this critical lifeline (Marais 2019). Yet what may be most notable about many of these programs is that they have often been driven by democratic pressure, albeit of different types. BISP in Pakistan and Progressa in Mexico was introduced in a top-down and technocratic fashion by highly insulated agencies, but nonetheless for the purposes of legitimating newly constituted democratic governments (Graizbord 2024; Jamil 2022). In India and Brazil, NREGA and Bolsa Família were initiated at the local level and then scaled up and diffused through civil society activism to be finally implemented by left-of center parties (Adhikari and Heller 2024; Sugiyama 2011; Wampler, Sugiyama, and Touchton 2015).²²

The development of Brazil's Sistema Único de Saúde (Integrated Health System) is a particularly good case for understanding the dynamics and effects of embedding democracy. It was introduced in 1988, when cities barely had health services for the poor and the traditional health bureaucracy was rife with corruption (Wayland 1996). Its expansion has enabled the universal provisioning of health care, driving some of the most dramatic reductions in infant mortality ever recorded for a country in the Global South (Gibson 2018:169). This expansion was made possible by a direct alliance between the state and the Sanitarista movement, which was driven by health care professionals committed to the right to health care (Giovannella et al. 2012). If the Sanitaristas were pivotal in pushing for the national policy, the direct impact of civil society engagement is further underscored by Gibson's (2018) finding that measurable health outcomes at the municipal level are correlated with the degree to which Sanitaristas penetrated into municipal health bureaucracies.

These new policy interventions are not simply new forms of governance or state action but are intrinsically linked to a larger dynamic of challenging entrenched social hierarchies. In Latin America the expansion of social protection and basic collective goods provisioning was framed in the language of social rights and of the need to incorporate historically marginalized groups (Paschel 2016; Yashar 2005). Similarly, in India the broad welfare reforms in work, education, and primary health care during the Congress-led UPA governments of 2004–2014 were all advanced as rights-based policies (Jayal 2013; Tillin 2025). This not only breaks with the patronage or corporatist politics of the past but also builds institutional capacity for citizen claim-making. In Brazil, Bolsa Família is credited with having significantly reduced the stranglehold of clientelistic politicians over the urban poor (Hunter and Sugiyama 2014). And in India, NREGA has leveraged the capacity of lower-caste landless laborers to bargain for higher wages (Veeraraghavan 2021) and given poor women independent sources of income (Drèze 2025), in a country where the barriers to female labor-force participation are acute (Ghosh 2024).

The point that bears emphasizing here is that despite stark structural limits to redistribution—including the entrenched power of traditional elites, the mobility of capital, and the persistence of flat or regressive tax systems—many countries in the Global South have made significant progress in providing basic social protections, through policies that are relatively inexpensive. Income inequality is widening in most countries, but the capacity to capture a share of the social surplus and to reduce poverty and make social investments has also increased. Just how much can be done with limited resources is exemplified in various estimates of just how little it would take to eliminate *global* extreme poverty or the incidence of avoidable mortality (Sumner and Yusuf 2024). In South Africa, an ongoing debate on whether to expand social grants into a basic-income grant has led to estimates that it would take only 3% of GDP to fully eradicate poverty in the world’s most unequal country (Tregenna, cited in Marais 2019:8).

These expansions of the DSDS have increased the embeddedness—in Polanyi’s classic sense of the term—of the economies of the Global South. In contrast to the classic welfare states of industrialized Europe, the emerging Global South DSDS is less about full employment and regulating labor markets, and more about providing a basic social wage and enhancing capabilities. And while most of these policies eschew direct or hard forms of redistribution, such as land or labor market reforms, they still have marked redistributive effects by extending services, providing more social protection, and expanding access to social goods. There is also clear evidence in the Brazilian case of a virtuous cycle of social expenditures and growth. As Kerstenetzky (2012) finds in her book on the emergence of a Brazilian welfare state, during the years of rule by the Workers’ Party (Partido dos Trabalhadores, PT) (2004–2016), government transfers as well as minimum-wage hikes drove lower-class consumption and sustained growth. She concludes that in terms of policy “the main innovation was the belief that social spending could contribute not only to the achievement of rights, but also to easing its own financing conditions, making the social budget, in a way, endogenous to social policy itself” (232).

In sum, even under the conditions of neoliberal globalization there has been a measurable degree of success in incorporating previously excluded lower classes into the regulatory and social ambit of the state. Some critics have argued that this incorporation is a form of subordination to market forces or demobilization orchestrated by elites.²³ There are certainly cases where this rings true, as in Mexico or Modi’s India, where reforms have been specifically tailored to increase political dependency on the ruling party. But overall the comparative evidence shows that the expansion of social policies is most likely to occur in competitive democracies, and indeed that the more participatory a democracy is, especially as measured by active participation by subordinate groups, the more redistributive it becomes. A growing literature has specifically linked new forms of popular incorporation to bottom-up pressures from social movements (Anria et al. 2022; Chiriyankandath et al. 2020; Garay 2016; Gibson 2018; Silva 2017). And in their cross-national analysis of Latin American countries, Huber and Stephens (2012) find a positive statistical association between democracy and social spending, and subsequent reductions in poverty. They further show that having programmatic left parties in power also has a positive effect on poverty reduction.

Divergent pathways in India reinforce this finding. The two large Indian states that have had the most success in significantly improving social development indicators—Tamil Nadu and Kerala—are also the states that have had the most vigorous and long-term social justice movements (Heller 1999; Kalaiyaran and Vijaybaskar 2021; Singh 2015). Both states have worked within the same basic fiscal and structural constraints that other Indian states have. In contrast, the states of Gujarat and Maharashtra, which have experienced the most dynamic growth and attracted the most investments, have lagged behind in social development indicators as well as implementation of NREGA (Drèze 2025). In both, upper-caste coalitions have dominated politics for two decades, and Muslim and lower-caste mobilization has been met with repression (Jaffrelot 2021).

TAKING STOCK

If the development literature in sociology three decades ago was dominated by arguments about the growth-inducing developmental state that operated under authoritarian regimes (Cardoso and Falleto 1979; Evans 1995), today we should be open to the possibilities for the DSDS. The expansion of welfare policies in the Global South has been inextricably tied to democratization, but also to a transformation in state–society relations that sociologists have been particularly good at documenting. The rise of the European welfare state would not have been possible without the organizational cohesion and political efficacy of the working class (Rueschemeyer, Stephens, and Stephens 1992). The persistence of the subproletariat in much of the Global South and the more recent effects of deindustrialization have limited the size and impact of organized industrial working classes. Instead, the demand-side logic of expanding social rights has come from a more heterogeneous set of civil society actors and social movements, which include various categories of non-industrial workers (including peasants) but also urban slum dwellers, indigenous peoples, racial minorities, women’s groups, and a range of rights-based community organizations.

Three characteristics of these civil society actors have implications for the future of social development. First, though they are not as rooted in clearly defined redistributive interests as traditional working-class unions, they have developed repertoires of engagement that contribute directly to institution-building and democratic deepening. In Brazil, for example, civil society actors pushed for new forms of participatory democracy, including sectoral councils, that have significantly enhanced and democratized a range of policy domains (Lavalle and Szwako 2015). In India, the rollout of NREGA and other rights-based welfare reforms was driven by a coalition of civil society actors who introduced new forms of accountability, including public hearings, social audits, and grievance redressal laws (Adhikari and Heller 2024). The current push in South Africa to introduce a basic-income grant is coming from highly organized legal and social activist groups (Osborne 2024). Second, these varied modes of engagement have produced forms of co-production that significantly extend state capacity and feed pragmatic policy innovation, in a dynamic that Marques (2021) has dubbed “incremental progressivism.” Third, broader and more direct forms of engagement with the state not only enhance

the associational capabilities of the poor and excluded but also directly challenge traditional social hierarchies of race, gender, and caste. In other words, democratizing access to the state and its policy domains brings together the politics of redistribution and recognition.

In light of these broad lessons, where do we currently stand? The bad news is that the increased dominance of financial capitalism in the twenty-first century is ramping up the pressure to privatize public services and to commodify labor and the environment (Fraser 2022). The good news is that recent reversals aside, democracy has become a powerful norm in the Global South, and social rights have become part of the political fabric. The current conjuncture is somewhat paradoxical: even as the global economy is increasingly dominated by capital and the power of multinationals (not to mention resurgent bully imperialism from the U.S.), welfare states in the Global South have very significantly expanded their capacity to deliver public goods, basic services, and some social protection. This is especially clear in Latin America and East Asia (Haggard and Kaufman 2008), but also true in South Asia. In Africa, progress has been slower, but there have been notable advances in developing social protection schemes (Niño-Zarazúa et al. 2012). In some cases, such as Brazil, welfare gains have actually led to a drop in inequality (Kerstenetzky 2012, 2014). But even where income or wealth inequality has not narrowed or has even widened, overall social development indicators from literacy to infant mortality have improved significantly, even in what were once considered the most challenging cases (like Bangladesh).

We can also draw some lessons from the three DSDSs I have focused on to better understand the relationship between democracy and welfare expansion. Brazil is clearly the most comprehensive and coordinated case (Kerstenetzky 2012, 2014, forthcoming). Across all sectors, state interventions have expanded access and inclusion, to the point of universalization in pensions, basic social wages, primary and second education, formalization of some labor sectors, and frequent and fully enforced periodic increases in minimum wages, which have benefited the subproletariat in particular (Singer 2012). Brazil also stands out for its coordinated decentralization: municipalities have been empowered to actually deliver and innovate, while still being beholden to federal standards that set basic conditions for a range of social services and rights. Political competition between centrist parties and the PT has been key, as has been the programmatic character of the PT itself. A strong, highly networked, mass-based but also highly professionalized civil society has ensured continuous accountability and driven significant innovation, as in the public health and urban reform sectors. Redoubts of local authoritarianism remain significant, and the agrobusiness and financial sectors remain extraordinarily powerful, so much so that the current PT government has had only limited success in revamping Brazil's regressive tax system. But extreme poverty has been wiped out, and what was only three decades ago a largely excluded subproletariat has been partially incorporated.

Because the ANC came to power on the strength of a broad-based and diverse movement similar to the Brazilian democracy movements (Seidman 1994), one might have expected a similar trajectory in South Africa. But the ANC, because it was

a liberation movement in exile and internally Leninist, has had a more conflicted relationship to popular movements and civil society. The ANC has recognized the importance of social grants in a context of extraordinarily high and intractable unemployment, and as part of its mandate to deracialize South Africa it has expanded access to primary health and education. With until recently no significant electoral competition and with popular civil society strategically contained, the ANC has become increasingly factionalized and patronage-driven, so much so that during the Zuma years (2009–2018) it was literally auctioning off state resources to its powerful business partners. A sophisticated professional civil society that is one of the legacies of the anti-apartheid movement did eventually reign in Zuma, but the party is still beset by internal rent-seeking factions and has lost so much legitimacy that for the first time in its electoral history it now has to rule with a coalition partner, which is much more pro-market.

In India, the UPA government (2004–2014) presided over a greater expansion of social programs and collective goods than probably all of the governments before it taken together. Before the UPA, India had a patchwork welfare regime that provided social insurance to its public employees and a very small organized working class, but all but neglected social development in rural areas. By the end of the UPA era it had built out the basic architecture of a welfare state that could provide food, primary education, basic health care, and rural employment to the poor.²⁴ In a subcontinent of 1.3 billion people and 28 subnational political regimes, delivery was necessarily uneven, but the improvement was dramatic. The Indian welfare state remains marked by two significant weaknesses: the quality of services and public goods is often very poor; and the capacity to coordinate state interventions is fundamentally handicapped by weak local-level governments, especially cities.

Finally, we have to address the fact that in the current conjuncture we are facing an age of reaction. For a decade we have witnessed the rise of right-wing ethno-nationalist regimes that are directly threatening democratic institutions and practices. Much of the literature on right-wing populism has focused on the Global North, but the ascendance of Modi in India, Bolsonaro in Brazil, and Duterte in the Philippines represent far greater threats to democratic gains. As I have argued elsewhere, in all of these cases, the rise to power of reactive elite-based regimes has been a direct response to advances in expanding social rights (Heller 2000). Bolsonaro rode to power on the strength of a series of corruption scandals, but also mounting resentment among elites and middle classes of the upward mobility of lower classes (and Blacks), both in income and in access to previously exclusionary spaces and institutions (higher education, malls, airports). Bolsonaro's defense of the traditional status order (*deus, pátria, e família*) was an explicit challenge to the rights-based policies of the PT years, often racially coded in the form of attacks on *favelas*, stereotyped as dens of criminality. Similarly, the BJP in India came to power by aligning its traditional dominant upper-caste, upper-class base with sections of the "aspirational middle classes" and lower castes through appeals to Hindu nationalism (*Hindutva*) that have relied on marginalizing Muslims (Heller 2020; Jaffrelot 2021; Yadav 2021).

But these reactive regimes have clear limits. Though Bolsonaro cut federal support for welfare programs, governors and mayors pushed back, and when the COVID pandemic

hit, Bolsonaro actually increased support for Bolsa Família, and a civil society coalition successfully pressured Congress to increase transfers. Lula and his PT defeated Bolsonaro in 2022 largely by defending the *conquistas sociais* of the previous PT governments. Modi came to power in 2014 having attacked the welfare state as wasteful and as a form of “appeasement” of minorities, but he preserved most welfare policies and even developed new ones. A range of commentators have identified Modi’s second term (starting in 2019) as pioneering a “new welfarism,” and Tillin (2025:202) notes that “the BJP has proved similar to many new right populist parties in Western Europe that have embraced social spending and welfare commitments comparable to parties of the old European left, alongside a politics of chauvinism.” If welfare has been maintained,²⁵ its political logic has shifted from the rights-based framing of the UPA to a technocratic form of neo-patrimonialism (Aiyar and Sircar 2024).²⁶ Welfare recipients have been recast as virtuous (Hindu) patriots that have been empowered—as opposed to entitled, as citizens—by the largesse of the leader (Modi), and local institutions are increasingly bypassed by centralized, app-based delivery systems. Modi retained power in the 2024 elections in India, but nonetheless lost ground, especially among lower-caste and lower-class voters alarmed by the erosion of their rights (Aiyar and Sircar 2024). A source of significant democratic resilience in India is its regional politics. For all of Modi’s personal popularity and the organizational strengths and ideological depth of the BJP, Hindutva politics have failed to make much progress in some states, especially those with a strong track record in advancing social development.

RESEARCH DIRECTIONS

Although welfare policies in the Global South have expanded, we still know comparatively little about why or how this is happening. Compared to the vast literature on welfare states in the North, the typologies presented here are first approximations and very general configurational sketches of what is driving social development in the Global South. While I have argued that the expansion of welfare policies must be located in iterative patterns of state-building and civil society demand-making, there are clearly different pathways (as suggested by the comparison of Brazil, India, and South Africa) that need much closer examination and different sets of comparisons. Why has Brazil done better than Argentina in terms of building a rights-based welfare state? Why have some East Asian states reduced poverty so much faster than others (Malaysia versus the Philippines, for example)? Drilling down, how can we explain variation across policy interventions? Why have conditional transfer programs done relatively well while efforts to regulate labor markets, and in particular to provide protections to informal-sector workers, have not fared as well? Why has *in situ* slum development been more successful than provision of public housing?

Much of the classic literature on the developmental state focused on Weberian bureaucrats in nodal agencies, arguing that they were the key to developing successful industrial policies. But as much as social policies require effective bureaucracies at the center, they also depend on the quality of front-line workers. So under what conditions

do states invest in front-line workers, and when and how does this translate into more effective forms of co-production of collective goods? Many welfare-enhancing policies and programs are delivered at the local level, yet with some notable exceptions (Bradlow 2024; Gibson 2018; Marques 2021) we have paid little attention to the role of local government in securing social development. Why are municipalities in some countries better at delivering basic services than in other countries? Why is there so much variation across local governments within each country? And under what specific conditions can more deliberative, iterative forms of problem-solving policy action emerge?

While sociological scholarship has made enormous contributions to our understanding of the role of the state in economic development, we are only beginning to come to terms with the historical, social, and political factors that drive the expansion of the DSDS.²⁷ Theories that were developed to explain European welfare states and that focus on the organized power of the working class or the legacies of state formation provide inadequate traction in the Global South. At the broadest level, we know that the advances in welfare support outlined in this paper were based on a fortuitous convergence of a highly diverse coalition of subordinate groups aligned with progressive elements of the middle class. But what exactly are the configurations of civil society actors that have driven welfare-enhancing reforms, and under what institutional or political conditions are they most likely to be effective? As sociologists have always argued, regimes in power are based on social blocs, the composition of which are inherently fluid, especially in times of massive economic transformation and uncertainty. If we are to make sense of the parameters of the possible going forward, we need a better understanding of the social and political forces—the configurations of mobilized power—that promote democracy and social inclusion. ■

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NOTES

1. The COVID pandemic, which triggered calls for reterritorialization of production, and Trump's inchoate but destabilizing tariff wars, may have arrested the advance of globalization. But in the post-Fordist era of globalization, capital has become immeasurably more mobile, and production chains have geographically dispersed to such a degree that reterritorialization on any significant scale is unlikely. On how Apple's supply chains have changed in the wake of the China crisis, but have if anything become more dispersed, see Miller and Venugopalan (2025).

2. See Harris (2017) on Iran and Slater (2012) on Singapore and Malaysia.

3. I use the term "poverty" in the sense of the UNDP's (2025:5) concept of multidimensional poverty, which includes a range of measures of health, education, standard of living, and access to basic services. In 2025, Sub-Saharan Africa accounted for nearly half of all people in acute multidimensional poverty (UNDP 2025:7).

4. Early efforts include Wood and Gough (2006) as well as Seekings (2012). One of the most ambitious contributions to date is Haggard and Kaufman's (2008) historical analysis of the different trajectories of welfare states in East Asia, Latin America, and Eastern Europe. At their transcontinental level of analysis, they identify regional welfare legacies as critical to shaping the path of new welfare states. These regional patterns are however extremely broad and fail to capture some significant similarities *across* regions, as well as distinct differences *within* regions, in patterns of welfare state formation.

5. As dependency scholars pointed out long ago, and as Piketty (2014) has more recently underscored, Africa remains the only continent that continues to experience a net outflow of capital.

6. I have used the term "social development state" in previous work (1999) on the Indian state of Kerala, but did not make a comparative case. The first and most elaborated argument for this type is Kerstenetzky's (2014) work on Brazil.

7. Bangladesh stands out as the most remarkable instance, but there are other important cases, such as public-health activists in Thailand (Harris 2015).

8. South Africa and Brazil have the official distinction of having long had the highest Gini income inequality. India's is lower, partly because of measurement problems in an economy with a massive informal sector, but has also had some of the highest levels of absolute poverty of any country in the world.

9. Well before modern welfare states emerged, Du Bois (2014) argued that European democracies were able to accommodate the demands of their working classes only because of colonial exploitation.

10. The subproletariat is the workforce that has never been incorporated into the legal and institutional structures of the formal capitalist economy. It encompasses the laboring classes that are peripheral to the capitalist economy, representing a form of absolute surplus labor (Chatterjee 2019: 79). With either very little property (small peasants) or no access to formal waged employment, their labor is casualized and highly precarious. In rural areas they are subsistence farmers and landless laborers, and in the urban sector they are informal workers, including a growing population of unemployed or underemployed and highly peripheralized populations living in slums or unauthorized settlements.

11. Jäger and Vargas (2023) argue that conditional cash transfers imply a rollback of the state and constitute "welfare without the welfare state." But as Osborne (2024:15) notes, "The politics which brought them into being are often flattened into an easy account of policy isomorphism or some sort of crude understanding of concessions to capital." In the cases examined here, there is ample evidence that transfer programs have been part and parcel of a broader strategy to promote social development.

12. One of the more notable successes of the Brazilian case has been the *in situ* upgrading of favelas and informal settlements (Marques 2021).

13. Lee (2012) adds to this argument by showing how associational networks have connected civil society to state institutions.

14. This has been a notable tension in the ANC. The dominant faction is close to COSATU (South Africa's union federation) as well as the business community, and has long supported a classic social-democratic employment-generation focus coupled with affirmative action policies for an emerging black bourgeoisie. But unemployment in South Africa has remained stubbornly high (hovering at 33%), and organized labor has made no inroads into the informal sector. So other factions of the party, often closer to municipalities or civil society organizations, have focused on the collective consumption rights of the poor, including social grants, housing, and better service delivery.

15. Evans originally defined embeddedness as "a concrete set of social ties that binds the state to civil society and provides institutionalized channels for continual negotiation and re-negotiation of goals and policies" and added that "dense connecting networks without a robust internal structure would leave the state incapable of resolving collective action problems. . . . Only when embeddedness and autonomy are joined together can a state be called 'developmental'" (1995:12).

16. Rajiv Gandhi, who served as prime minister in the 1980s, once quipped that for every rupee spent on a program only five paise (cents) reached the beneficiaries.

17. For a data set of primary documents from the committee that designed rights-based legislation during the UPA, see "Deliberations of the National Advisory Council (NAC) I & II" in the Digital Collection at Brown University.

18. For NREGA, a range of case studies shows that that implementation, as measured in days worked per capita, varies highly by state. The high performers are more likely to be non-BJP states. The case of education reform is also illustrative. Progress on universalizing access to primary school has been significant, but progress on increasing the quality of education has been very poor, and it varies dramatically by state (Aiyar 2024; Mangla 2022).

19. Despite rapid and sustained growth, Ghatak, Jha, and Singh (2024:6) find that the proportion of workers engaged in typically low-productivity and highly precarious work remained consistently above 75% between 1993 and 2002.

20. For an overview of the evaluation literature on conditional cash transfer programs in Latin America, see Medellín et al. (2015).

21. NREGA costs less than 0.3% of GDP but covers 150 million workers (Chiriyankandath et al. 2020:23–24). Bolsa Família was only 0.5% of GDP but explains about 10% of the overall decline of income inequality (Huber and Stephens 2012:150, citing Barros et al. 2010).

22. De Souza Leão (forthcoming) argues that though Mexico's Progresá was discontinued in 2018, Bolsa Família has continued and expanded in Brazil because it has become broadly institutionalized across many federal agencies, is widely supported by mayors across all parties, and has deep linkages to civil society.

23. The subordination argument suffers from the classic paradox that workers in the short-to-medium term are better off being fully incorporated into capitalism than holding out for the uncertain and very costly prospect of a transition to socialism (Przeworski 1985). For the second argument, Koyuncu, Yörük, and Gürel (2023) used large linked data sets to make the claim that NREGA was targeted at areas of high militancy. But they do not specify any mechanisms, and they can't explain away an obvious conundrum: why would the left-affiliated designers of these programs demobilize their own base? In multiple interviews with key architects and a review of extensive primary materials from the policymaking process, I found no support for this argument.

24. Between 2004 and 2011, the proportion of rural households that received work through public programs when from 0.5% to 29%. Those using the public food distribution system basically doubled, to 52%. Those accessing school lunches went from 37% to 50% (Tillin 2025:186). And primary school enrollment, which had long stagnated at some of the lowest levels in the world, reached 100%.

25. Kohli and Murali (2025:87) show that social expenditures have remained flat between the UPA years and Modi's government.

26. In December 2026, the BJP reconfigured NREGA from a rights-based employment program in which any rural household could demand work at any time to one in which the central government has discretionary power to allocate work across districts and agricultural seasons.

27. Recent examples of work in this direction would include Paschel's work on racial justice in Brazil and Colombia (2016), Roychowdhury (2020) on the role of women's organizations, Kruks-Wisner (2018) on rural demand-making and Edwards' (2025) case study of union-fueled social development in Trinidad and Tobago.

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