China’s Social Insurance Movement in the Twentieth Century:
A Global Historical Perspective

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This study analyzes China’s social insurance movement in the twentieth century in global historical perspective. Social insurance is defined as an employment-related income maintenance system for old-age, sickness, unemployment, maternity, and work injury, but also viewed as the “historical core” of the welfare state. The global perspective of the analysis is a creative synthesis of Meyer’s theory of world society, diffusion theories, and theories of the welfare state based on the experience of Western industrial democracies (modernization theory, neo-Marxism, and state-centered theories). The study argues that China’s social insurance movement partially resulted from diffusion of competing world models of social insurance - the capitalist and socialist models – through interactions of global forces (such as the International Labor Organization, international advisors, and national polities) with Chinese national forces, for most of the twentieth century. In the 1980s, however, China switched to the mainstream world model provided by the ILO, and then in the 1990s to the neo-liberal model of individual accounts advocated by such global neo-liberal forces as the World Bank. While global forces provided the basic intellectual framework, national and local forces determined the timing and specifics of the adoption of social insurance programs. During this process, Chinese national forces contributed in turn to the development of world models of social insurance. Through the entire twentieth century, various Chinese governments stressed “Chinese situations” and “Chinese characteristics” whose essence was regarded as the Confucian heritage. These terms, however, were defined increasingly in terms of the competing global norms and principles. This study not only fills a major gap in Chinese studies, but also extends the theory of social diffusion and the study of the welfare state. It is based on research at China’s Number Two National Archives at Nanjing, the Guangdong Provincial Archives at Guangzhou, and major libraries in the United States, Hong Kong and mainland China.