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Conscription, the Military, and Welfare State Development: An Introduction

Herbert Obinger *

Abstract: »Die Entwicklung von Wehrpflicht, Militär und Wohlfahrtsstaat: Eine Einführung«. This paper discusses several possible causal mechanisms through which conscription and military interests might have shaped the development of western welfare states in the age of industrialized mass warfare. Relevant factors are military concerns about the quantity and quality of the population, the necessity to enhance legitimacy and to secure mass loyalty in times of war and military threat, and a growing pressure to compensate the 'blood tax' imposed by the draft with civic and social rights after the end of war.

Keywords: Conscription, military, war, welfare state.

1. Introduction

A problem untouched by research, which requires a historical analysis of the origins of the welfare state [...], is the effect of mass conscription on welfare state development.
(Wilensky 1975, 80)

The welfare state emerged in the age of universal conscription and industrialised mass warfare. During the second half of the 19th century, nearly all continental European countries¹ emulated the Prussian model of military organization and introduced universal military conscription, mainly as a consequence of a military defeat and rising military tensions (Hintze 1906; Andrzejewski 1954; Foerster 1994; Epkenhans and Groß 2003; Asal et al. 2015). Simultaneously, scientific progress and industrialisation led to vast improvements in modern military technology. The invention of the machine gun and the mechanization of the armed forces dramatically enhanced the firepower and destructiveness of

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¹ Britain and her colonies as well as other English speaking democracies were notable exceptions (Levi 1996), since conscription was only imposed in wartime or even failed as in Australia in a referendum in 1916. This pattern also holds in a global perspective. In a study on the determinants of military conscription in more than 100 countries from 1826 to 2000, Asal et al. (2015) show that democracies and former British colonies were far less likely to opt for conscription, whereas rising military rivalries and inter-state wars accelerated the introduction of the draft.

weaponry (Porter 1994; Chickering et al. 2012). New means of transportation such as the railway and innovative forms of military communication like the telephone and telegraph accelerated the territorial expansion of warfare and fundamentally altered the conduct of war (Onorato et al. 2014). These changes in the underlying conditions of combat meant that every future conflict between the great European powers would be waged as large-scale, industrialised mass warfare. Facing a total war, the existence of the state and the nation were at stake since a victory in such a conflict could only be achieved through the complete surrender of the adversaries and the annihilation of their military capacities. Rising tensions between Europe's nation-states during the age of imperialism strongly increased the likelihood of such a scenario, until it became a terrible reality in 1914 and rendered the widespread belief in a quick exchange of fire obsolete.

Parallel to these developments, European governments introduced the first social protection schemes. Labour protection legislation was the first field of state intervention in social affairs. Initially limited to children and adolescents, labour protection was later extended to women and eventually to the entire industrial workforce (Bauer 1923). After enacting social protection schemes for especially endangered occupations such as seafaring and mining, the 1880s witnessed the breakthrough of social insurance for larger parts of the population. The pioneering nations were the constitutional monarchies in Central Europe, whereas Europe's democracies followed with a slight delay. On the eve of the First World War, however, all West European states had implemented at least one social insurance program (Alber 1982).

Whether and to what extent the introduction of universal conscription and the consolidation of the modern welfare state are causally interrelated was to date not subject of systematic research. This is surprising, as both developments are closely connected to the formation of nation-states and industrialisation. Nevertheless, military historiography and comparative welfare state research remained separated disciplines, except for the studies examining the provision of welfare benefits to veterans and the military personnel (e.g., Geyer 1983; Gerber 2012; Mittelstadt 2015; Pawlowsky and Wendelin 2015; Pironti 2015; Obinger et al. 2020). Apart from that, however, social policy was perpetually on the margins of military historiography, while the welfare state literature paid very little attention to the military and conscription.

According to the mainstream of comparative welfare state research, the emergence of the modern welfare state is generally attributed to deep-seated socio-economic transformations, brought about by the industrial revolution and the resulting rise of the labour movement. Additional explanations include state and nation-building, secularisation and democratisation, and efforts of autocratic regimes to enhance legitimacy (e.g., Rimlinger 1971; Wilensky 1975; Flora and Heidenheimer 1981; Alber 1982; Schmidt 2005; Castles et al. 2010; Ritter 2010; Obinger and Petersen 2019). By contrast, the impact the draft, military

interests, or power ambitions in foreign policy might have had on welfare state development has not been systematically examined. Hence the research gap, to which the American sociologist Harold L. Wilensky alluded to almost 50 years ago, still exists today. The contributions in this issue aim to fill this gap. To this end, we first have to look at causal mechanisms of how conscription and military interests might have affected welfare state development. The term “welfare state” will herein refer to the broader (Anglo-Saxon) definition which sees education as part of the welfare state in addition to its classic pillars of social security, labour protection legislation, and welfare.

2. Theoretical Reflections: Conscriptions, Military Interests, and Welfare State Development

A causal relationship between conscription and a government’s social policies might be surprising at first glance. In addition, the military is an unusual suspect for explaining government intervention in the field of social and education policy. If it was considered at all, welfare state research saw the military mainly as an opponent of social policy as it was assumed that the military is first and foremost interested in maximizing the military budget which, in consequence, would crowd-out social expenditure (“guns for butter trade-off”). While this assumption is highly plausible in wartime, when military spending is skyrocketing,² it is less convincing for the preceding phase of war preparation. Moreover, the notion of a spending trade-off also neglects regulatory social policies such as labour protection legislation which are inexpensive and therefore do not constrain the military budget.

On closer examination, however, a number of potential connections between universal conscription, the military, and social policies become apparent, especially when considering the far-reaching changes in military technology, the fundamental socio-economic transformations, and the rising domestic and international political tensions taking place during the second half of the 19th century. The profound changes in the organization of the armed forces resulting from the implementation of the draft and the massive technological advances in the weaponry not only occurred in the age of continuing industrialization, urbanization, and demographic transition but also coincided with the age of imperialism, nation-building, and progressing democratization. It is the interplay of these developments that, at least from a theoretical perspective, might have generated an impetus for social policy reform and a heightened military interest in these issues.

² In 1943, for example, military spending in Germany made up 70%, in Great Britain 55%, and in the USA 42% of the national income (Harris 1998, Table 1-8).

At least five causal mechanisms might link general conscription and welfare reform. They will be discussed separately in the following sections. Overall, the focus is on the quantity and quality of the population, the tensions between citizen's rights and duties as well as militarily motivated aspects of political legitimacy. However, the relevance of each of these mechanisms significantly depends on national, (geo-)political, and socio-demographic contexts. Additionally, only specific welfare programs, not the entire welfare state itself, are potentially of military interest.

2.1 The Amount of "Human Material"

"Nations lacking children are calmer than nations with plenty and they have to be, because they do not have enough soldiers" (Kahn 1930, 191). In the age of total war, demographic and biopolitical issues increasingly became the focus of the military's strategic planning (Titmuss 1958). Carl von Clausewitz's old doctrine of the "superiority of numbers, which should first and foremost be sought" (von Clausewitz 2012 [1832], 203) not only applied to the arsenal of weapons but also to the number of soldiers ready to mobilise. The underlying reason was simple: military strategists assumed a linear relationship between the amount of what they, in a derogative manner, called "human material" and military strength (Hartmann 2011). Inspired by the military success of the *levée en masse* (i.e., the massive mobilisation of patriotic citizens during the Napoleonic Wars), Prussia and later on many other European nations emulated this model by implementing compulsory military service. Mass conscription and the resulting millions-strong armies, the massive geographic expansion of warfare through the railroad, and new communication technologies made the "superiority of numbers" even more important. Erich Ludendorff (1937, 49), an apologist of total war, declared: "In wartime, numbers are only too often of crucial significance [...]. The importance of numbers must be recognised with utmost clarity."³ In a similar vein, Chief of the General Staff of the Austro-Hungarian Army Franz Conrad von Hötzendorf stated that

the advantage of numerical superiority in combat was strengthened by modern weaponry, especially for those planning a war of aggression. Even though other factors for waging a war remain important, the 'number' is nonetheless of top priority, mainly because it is a factor that can be measured with absolute certainty even in times of peace.⁴

This issue gained increasing political attention from the late 19th century onwards. A major reason was the gradual demographic transition from very high to exceedingly lower birth and death rates, set in motion by socio-economic

³ Own translation.

⁴ This quote comes from an article published against Conrad's will with the heading "Mein Programm" in Danzer's *Armee-Zeitung*, vol. 47 (1906).

modernization, secularization, and advances in medicine. Even though the total population continued to grow considerably,⁵ demographic transition increasingly raised military concerns because military planning was focused on the younger segments of the population (i.e., the future generations of soldiers). Particularly the birth rate became a key issue for military strategists. In fact, the demographic change starting in the late 19th century was immense, as the birth rates in the western world went down by about 50 percent between 1870 and 1940 (Teitelbaum and Winter 1985, 14). However, the onset of this process varied strongly, depending on the country's level of modernisation and industrialisation (Kahn 1930). France was unique in this respect, as the birth-and death rates decreased very early and simultaneously (Tomlinson 1985). The comparison of French birth rates with the number of births in the (rival) neighbour states fuelled fears of depopulation and prophecies of an approaching demographic demise ("finis Galliae"). In consequence, the "*Alliance nationale pour l'accroissement de la population française*" (National Alliance for the Growth of the French Population), a lobby organization for pronatalist policies, was established in 1896. Ensuing debates were inspired by military aspirations and galvanized through the higher birth rates in Italy and Germany (Hartmann 2011; Dörr 2020, in this volume). Once those countries had also been gripped by demographic transition, the expansionist aspirations of Italian fascism and German National Socialism prompted similar debates and apocalyptic demographic scenarios. The size of the population was simply equated to a nation's power and influence on the international stage. In a speech held in May 1927, Benito Mussolini demanded an increase of the Italian population to 60 million people during the second half of the 20th century, because "what are 40 million Italians compared to 90 million Germans and 200 million Slavs?"⁶ In a similar vein, the Nazis considered declining birth rates as an existential threat to the *Volksgemeinschaft* (national community) and an omen of impending destruction of the people, or *Volkstod* (Reidegeld 1989). Again, a simple relationship between population size, birth rates, and military strength was alleged (e.g., Staemmler 1934, 72), because "a people lacking descendants has lost its place in the world" (Hoffmann 1938, 23). Nazi sympathizer Erich Ludendorff viewed declining birth rates as an immeasurable danger with tangible impacts on the German *Wehrmacht*. He therefore advocated for health-promoting and pronatalist measures imbued with eugenic and racial principles with a view to create "a healthy, reproducing population, which would strengthen the army and be able to wage and endure a total war" (Ludendorff 1937, 23). Italy and Nazi Germany are certainly extreme examples of pronatalism motivated by war preparation, but demographic transition and the impact of the Great War on

⁵ Population growth in turn nurtured military expansionist tendencies; new living space was sought to supply all citizens.

⁶ Quoted in Forcucci (2010).

demographics made population policy and eugenics a major issue almost everywhere in the interwar period (Kahn 1930).

Once a pronatalist demographic policy is on the political agenda and the government attempts to influence the birth rate, families, young women, mothers, and young children become primary target groups of state intervention. From a theoretical perspective, there is a wide variety of possible policies available to increase birth rates. The oldest and arguably most ineffective measures are those targeting abortion rights and access to contraception. Nevertheless, these measures were often implemented because they were cheaper than policies discussed below. Historically, the termination of pregnancies was often outlawed to counteract a population decline. Military aspirations were also a common underlying motive for the introduction of such restrictive measures (Jütte 1993). In Nazi Germany, for example, abortions were prohibited by law,⁷ forcing other great powers to act, in part for military reasons. After Germany reintroduced general conscription in 1935, Stalin decreed a ban of abortions, despite the Soviet Union having been the first country in the world to introduce a liberal regulation of abortion. In addition to criminal law and government pronatalist propaganda, social and fiscal policies can be used to increase birth rates. Governments can encourage citizens to start a family by providing transfer payments and tax reliefs with a view to compensate the costs of family formation. Secondly, affordable housing for families is of special political importance. A third approach to raise population figures is to roll back infant mortality and to improve public health. Labour protection legislation to improve the health status of young women and expectant mothers is of particular importance in this respect. Measures might include prohibiting employment prior and subsequent to childbirth or banning night work for women. Policies to combat child mortality include various measures to improve nursing and medical services, public hygiene, and nutrition. In terms of public health, venereal diseases raised military concerns as sexually transmitted infections posed a significant threat to the army's fighting power but also increased stillbirths and sterility. Overall, however, the occurrence of pronatalist population policies strongly depended on national contexts. A pronatalist population policy is more likely under conditions of war planning and in wartime with its heavy human losses and declining birth rates.

2.2 Quality of the "Human Material": Public Health

Apart from the mere quantity, the transformation of socio-economic and technological conditions outlined above also led to an increased military scrutiny of a population's quality (Titmuss 1958). Universal conscription was introduced

⁷ This was only true for members of the so-called "*Volksgemeinschaft*." At the same time, the Nazis used eugenic policies and finally genocide to eliminate the "non-Aryan" population.

in a time of rapidly advancing industrialisation that led to an erosion of the lifestyles and working conditions of a world formerly dominated by artisans and agricultural workers. In the course of the Great Transformation (Polanyi 1944), the industrial sector increasingly became the employer of the rural population. The resulting mass migration into urban areas led to devastating social conditions in public hygiene and housing and was a main factor in the dissolving of traditional family structures. Familial support networks, feudalism, and guilds, which had formerly provided rudimentary social protection, lost their significance. The labour surplus generated by the rural exodus and the lack of market power of the emerging industrial proletariat depressed wages. While the landowner to some extent had a social responsibility for his workers in the manorial system, wages in the emerging capitalist labour markets were completely detached from such obligations (Achinger 1958; Ritter 2010). Since government interventions in the labour market were minimal during the golden age of liberalism, the new industrial and impersonal working conditions were dangerous, payments volatile, and the duration of employment often uncertain. Children and adolescents were also exposed to these precarious working conditions characterized by overlong working hours and only little time to rest. The combination of a widely deregulated industrial labour market and the erosion of traditional institutions providing social protection resulted in a massive impoverishment of large parts of the population.

The demise of the agricultural society also had a lasting impact on the composition of the army. Economic structural change led to a decline of the agricultural sector, which traditionally had been the army's most important reservoir for recruiting healthy and morally reliable soldiers. Instead of the strong young men from the countryside, more and more industrial workers came to stand in front of the draft board. The physical examination of those conscripted provided policymakers with the first mass data set on the health status and educational competencies of young men (Hartmann 2011). The deterioration of working and living conditions caused by industrialization and urbanization was mirrored in high numbers of young men who were deemed unfit for military service. In the 1830s and 40s, two thirds of young Prussian men were declared unfit (Frevert 2001, 106). By 1880, more than 50 percent of the young men mustered in Germany and Switzerland did not pass their physical (Cohn 1879), while the rate in Austria-Hungary was even higher (Tálos 1981).

Typically, the percentage of rejected recruits from cities and industrialized regions was higher than that of those coming from the countryside. It is therefore conceivable that concerns about the poor physical condition of young men may well have figured as part of the motivation for measures to improve public health. This is where social and health policies come into play.

Examples include labour protection legislation (e.g., working time regulations), better nutrition, and improved hygiene to roll-back rampant diseases. From a military point of view, such measures should only focus on children

and adolescents (i.e., prospective soldiers and mothers) in an effort to secure the nation's future defence power. In fact, there is some evidence that military motives were a driving force behind early labour protection legislation. A contemporary leading expert on international labour protection legislation noted with regard to the 19th century:

The very same century that freed the entrepreneur of the constraints imposed by the guilds and provided him with the greatest liberty to participate in the competition for markets, also forced him to organize production in such a way as to neither infringe on the adolescent worker's productivity and fitness for military service nor the adult worker's livelihood. (Bauer 1903, 79)

One of the first examples of such legislation is the Prussian "Regulative on the Employment of Adolescent Workers in Factories," enacted on 9 March 1839. Its impetus originated from a military report (*Landwehrbericht*) of the Prussian lieutenant general Heinrich Wilhelm von Horn, in which he attributed the dwindling number of recruits to the proliferation of child labour in the industrial regions of the Rhineland. This law included labour protection measures for children and adolescents and only allowed minors to work if they were also attending school. Despite deficits in terms of implementation, this act can be seen as an early proof for militarily inspired governmental action in the fields of education and social policy in a pioneering nation of general conscription (see Dörr et al. 2020, in this volume). In a similar vein, the military disaster of the Boer Wars (1880/81 and 1899-1902) was attributed to the negative effects of industrialisation and urbanization in the British homeland and it has been shown that concerns about "national degeneration" led to measures improving welfare for children and adolescents (Dwork 1987). A third example of militarily motivated policies to improve public health comes from Japan. On the eve of the Pacific war, high-ranking Japanese military officials established a Ministry of Health and massively expanded the coverage of health insurance. The motivation being that too many recruits were deemed unfit for duty at a time when the right-wing military government planned a massive war of expansion that required millions of soldiers (Kasza 2002).

Almost everywhere, the debate on the quality of the population was increasingly influenced by eugenic ideas. Reaching from Gobineau in France in the 1850s and Galton in Great Britain in the 1880s to the *Rassenhygiene* of the Nazis, health and population policy based on eugenic principles was seen on the one hand as a vehicle to provide the army with "good human material." On the other hand, eugenicists often were war apologists, warfare was considered to select the best and strongest (Melville 1910, 54).

2.3 Quality of the “Human Material”: Education

“Our conscript armies[*Volksheere*] do not need thoughtless machines, but thinking warriors, because they alone enable us to hope for success in the war of the future.”⁸ Due to the rapidly developing advances in (military) technology, national armies increasingly needed soldiers with higher qualifications and skills. The service and maintenance of technically more sophisticated weaponry and communication systems required basic reading, writing, and mathematical skills. Literacy was also an important prerequisite for effective propaganda and mass indoctrination (Posen 1993) with a view to raise the soldiers’ willingness to sacrifice for and to foster the “military-civic spirit” of the nation (Hintze 1906, 34). In multi-nation states, this required a common language, and command of this language was essential for effective communication within the military. Several languages were spoken in the Austro-Hungarian army, for example. However, the language of command and working language in the common army was German and every soldier had to learn at least a small number of German commands (Stone 1966; Hämmerle 2007).

Although conscription meant that the more educated classes entered the armed forces, which was one of the reasons for its implementation, there was a wide gap in educational attainment both within and across countries in the 19th century. Illiteracy was still a widespread problem, especially in the south-eastern parts of Europe. Due to the fact that the armies maintained their own educational institutions *and* operated programmes to fight illiteracy, they literally became a “school of the nation” (Duffy 1985; Frevert 2001; Epkenhans and Groß 2003), it is less clear to what extent public education reforms were shaped by military interests. Comparative studies in the social sciences concerning the historical development of primary education (e.g., Soysal and Strang 1989; Ansell and Lindvall 2013) have to date neglected this question. Economists, by contrast, have demonstrated in an econometric study that military defeats and military competition led to higher levels of public education spending (Aghion et al. 2012). There is evidence for Prussia, France, and Austria-Hungary, that the military tried to manipulate school curricula by insisting on patriotic education, more physical training lessons, and even target practice in middle schools (e.g., Führ 1968; Messerschmidt 1980; Posen 1993; Obinger and Kovacevic 2016). Primary education was not only considered to be an important vehicle for promoting a common national language and national unity, but also for conveying stereotypes and prejudices. Overall, however, the impact of the military on education policy was to date not systematically examined (Grawe 2020, in this special issue).

⁸ Captain in the reserve of the imperial and royal Austro-Hungarian Army, Danzer’s *Armee Zeitung* 11 April 1912.

2.4 From Civic Duties to Civic Rights

“Conscription, like taxation, demands representation” (Levi 2002, 342). Mass conscription has significantly changed the relationship between the state and its citizens because the citizens’ support of conscription “hinges on the perception of an acceptable policy bargain whose terms government actors are likely to uphold” (Levi 1996, 134). Since mandatory military service imposed huge burdens on young male citizens, the implementation of conscription raised the issue of how to distribute the personal risks and costs of military service in a fair manner. This “logic of equal sacrifice” (Wilensky 1975) is closely related to two questions. On the one hand, what is the contribution to the overall war effort of those who are not included in the draft and, on the other hand, what rights are granted in compensation for the civic duty of military service imposed by the state? Both questions are potentially of considerable relevance for social policy, albeit in an indirect manner.

Concerning the compensation of military duty, it has long been argued that general conscription meant a large step towards equality. The reason being that the draft was a compulsory institution with massive infringements of individual autonomy. Military service was lengthy, strenuous, and often humiliating due to military drills and harsh punishments. It also involved high opportunity costs and, in times of war, a high risk of death. Considering all these downsides of conscription, the question of what soldiers would gain in return for a duty mandated by the state was inevitable. A key aspect of this *quid pro quo* mechanism was the right to vote. From the outset, the ruling elites in Europe’s autocracies feared that the draft would entail demands for civic and political rights. Metternich, for example, called for the abolishment of conscription at the Congress of Vienna and almost everywhere, the ruling elites did not enact general conscription voluntarily but mainly in response to military defeats and severe domestic and foreign crises (Andrzejewski 1954, 69; Asal et al. 2015). Once conscription had been institutionalised, however, the pressure to offer concessions for lacking political rights increased. According to Andrzejewski (1954, 33) this pressure rises with the “military participation ratio,” i.e., the number of people under arms.

The nexus between conscription and suffrage was recognized early on by Hermann Ritter von Orges, a former Lieutenant of the Prussian army.

Democratizing the state requires the militarization of the nation, because not the man as such but only the citizen who is aware of his duties, feels as part of the community and subordinates himself to the common interest, has a claim to civic rights. Universal suffrage and general conscription back and reinforce each other. (von Orges 1868, 314)

In a similar vein, Otto Hintze (1906, 34) argued that the introduction of conscription meant “an unstoppable tendency towards a free constitution.” Although he rejected the notion of a simple linear relationship between conscrip-

tion and suffrage, history would show “that the fulfilment of public duties leads to the acquisition of public rights in the long run” (Hintze 1906, 39).

The occurrence of war is likely a catalysing and conditioning force in this respect. In fact, it was argued that mass warfare in particular, with horrendously high military and civilian casualties, created a “democratic imperative” (Porter 1994) since the men serving in the military (and the women and unfit men replacing them in industry) demanded political and social rights in compensation for their service and sacrifices. Empirical studies support this notion of a close nexus between the suffrage extensions, electoral reform (e.g., implementation of proportional representation), conscription, and mass warfare (Przeworski 2009; Hicks 2013; Ingesson et al. 2018). Ingesson et al. (2018), for example, use a global sample to show that conscription did not lead to the guarantee of political rights *per se*. The impact of conscription on suffrage extensions was rather conditional on warfare. The crucial point is that these political transformations unleashed by the interaction of war and conscription marked important turning points for welfare state development. The waves of democratisation after both world wars set the stage for new and more redistributive public social policies. Additionally, the introduction of proportional rule during and after World War I critically shaped political coalition building processes and, in consequence, the emergence of different types of welfare regimes (Esping-Andersen 1990; Manow 2009).

A further but less studied aspect of the *quid pro quo* logic is the compensation of conscription by the provision of social rights. Similar to the provision of political rights, there is evidence that the enactment and guarantee of social rights is also conditional on warfare in the sense that new welfare programs were introduced during or, more frequently, in the immediate aftermath of total war (Dudley and Witt 2004; Obinger et al. 2018; Obinger and Schmitt 2019a, b; Schmitt and Pironti 2020, in this volume).

The second issue related to the logic of equal sacrifice, namely the question of how those exempted from military service contribute to national defence and war efforts, could not be solved by granting rights but only by imposing new duties. From an economic perspective, the draft is equivalent to a tax because conscription supplies the state with cheap and forced labour. In consequence, opportunity costs of conscription are high (Oi 1967; Poutvaara and Wagener 2007). New findings in comparative political economy suggest that a fair burden sharing of ‘war costs’ was mostly accomplished through the tax-system. More specifically, the “blood tax” imposed by conscription led to a “conscription of income” (Bullock 1917). Scheve and Stasavage (2010, 2012, 2016) provide compelling evidence that the “logic of equal sacrifice” gave rise to a progressive and higher taxation of income and wealth. Men not obliged to serve in the military (mainly elderly wealthy men) were subjected to higher taxation in the name of burden sharing and social justice. In a similar vein, military compensation taxes were levied on recruits rejected as unfit (Cohn

1879). Consistent with the idea of burden sharing, revenues from these taxes were often used to support disabled veterans (Thierl 1892). As a result, conscription and mobilisation for mass warfare triggered major fiscal reforms, which, in the long run, facilitated the establishment of social security systems because new taxes and higher tax rates imposed in wartime were not, or only in part, revoked after an armistice (Peacock and Wiseman 1961).

2.5 Conscription, War, and Mass Loyalty

In the age of mass warfare, “the co-operation of the masses is essential for the successful prosecution of war” (Andrzejewski 1954, 33). During wartime, the mobilization of the entire nation for the war effort, the willingness of self-sacrifice, and measures to strengthen national unity are essential. In other words, securing mass compliance is indispensable for warfare. Beginning with Napoleon III and Bismarck, social policy was often used to generate mass loyalty and to strengthen the output legitimacy of political regimes (Adler 1897). Measures aimed at increasing output legitimacy (i.e., legitimacy through performance) are particularly important for autocracies and for totalitarian regimes. Götz Aly, for example, has argued that “continuous bribery in social affairs formed the basis for internal cohesion in Hitler’s *Volksstaat*” (Aly 2006, 89). He portrayed the Nazi regime as a “socio-political dictatorship of complaisance” (*sozialpolitische Gefälligkeitsdiktatur*) which relied on armed robbery, expropriations and mass murder to finance welfare in favour of the *Volksgemeinschaft*, thereby securing mass loyalty for the regime and possibly pacifying the home front. A major example for the ‘carrot-stick strategy’ adopted by the Nazi regime is the 1940/41 *Sozialwerk des Deutschen Volkes*. This was a plan by DAF leader Robert Ley concerning a major expansion of social policy so as to offer the German population a positive objective of warfare and to raise the legitimacy of the regime (Smelser 1989, 260ff.; Recker 1985, 82-154).

However, issues of legitimacy are also important for democracies in times of war or in militarily threatening situations. Against this backdrop, social policy might be an appropriate vehicle to enhance mass loyalty and to mobilize soldiers and civilians for the overall war effort. For example, governments might rely on welfare state promises by framing war as a fight for a better future. Well-known examples for ambitious welfare state promises in wartime include Roosevelt’s “Bill of Economic Rights,” the British Beveridge-Plan, or the Atlantic Charter, which declared the guarantee of social rights in the post-war period an official war aim of the allied powers (Nullmeier and Kaufmann 2010). It is also no coincidence that in Great Britain the term ‘welfare state,’ which had hitherto been confined to intellectual circles, gained importance in the 1940s and was used in deliberate demarcation from the Nazi warfare state (Petersen and Petersen 2013).

Issues of legitimacy are also important in situations of latent military rivalry. The Cold War is a case in point. It was only after the end of the Cold War that the demise of the mass conscript army began. Regime competition between the two rival blocs increased the necessity to enhance legitimacy and mass compliance on both sides of the Iron Curtain. In addition to military rivalry, the ideological competition between the Western and the Soviet bloc nurtured ambitions to outperform the rival bloc in terms of socio-economic performance and to flaunt the achievements of one's own political and economic regime (Obinger and Schmitt 2011; Petersen 2013). Overall, solving 'bread and butter issues' by promoting social policy or economic growth is a powerful and historically often practiced strategy for strengthening national unity, political legitimacy, and domestic stability.

3. Outline of the Special Issue

The previous sections have discussed several possible links between conscription, military interests, war, and the welfare state. It was argued that some fields of social policy, by virtue of their pacifying effects on domestic politics and their aforementioned impacts on birth rates and public health, have a potential military value. In consequence, domestic welfare reforms might create important prerequisites for the power ambitions of states in foreign affairs.⁹ This explains why social policy might attract the interest of the military already in the run-up to military conflict. From this perspective, social policy and welfare reform can be seen as vehicles of war preparation or *soziale Kriegsrüstung* (Potthoff 1915; Zimmermann 1915). War itself has further accentuated the importance of social policy. The horrors of total war created social needs of a magnitude that inevitably required government intervention in social affairs. Both world wars led to a shift in public social policy that was not only restricted to the social protection of veterans and their dependents but also affected the social protection of civilians (Obinger et al. 2018).

The following eight articles of this special issue will each examine one of the above-mentioned links between conscription, war, and the welfare state.

Nikolas Dörr, *Lukas Grawe*, and *Herbert Obinger* examine the military origins of labour protection legislation in Prussia and Imperial Germany. The authors demonstrate that military arguments were repeatedly used to justify and legitimate welfare reforms from the very outset. However, the military was neither the key actor nor were military concerns about the physical strength of recruits the predominant motive informing labour protection legislation. A major exception was World War I, when the military became a crucial actor

⁹ On the relationship between social policy and world politics, see also Reidegeld (2006, 268ff).

and, for military functionalist reasons, backed some path-breaking reforms, which had lasting effects in the field of industrial relations and collective labour law.

Focusing on Austria-Hungary, *Lukas Grawe* analyses whether military defeat and conscription motivated reforms in the field of primary education. After the defeat in the battle of Königgrätz in 1866, the newly created dual monarchy quickly introduced general conscription in 1868. Only one year later, a major school reform (the *Reichsvolksschulgesetz*) was adopted in the Austrian part of the empire. Grawe shows that military arguments did play a role in this respect as the military defeat against Prussia was attributed, among other things, to the poor education and high levels of illiteracy among the Austrian soldiers. In line with the findings of Dörr et al., however, such military concerns were not the key driving force underlying this change in primary education.

The contribution by *Nikolas Dörr* focuses on population policy in France. Compared to Germany and the United Kingdom, France lagged behind in its welfare state development. A notable exception, however, was the pronatalist family policy. Child benefits, tax reliefs for large families, and improvements in maternal and infant protection were implemented earlier and more extensively than in other European countries. Important reasons behind these policies, which were introduced while the country was caught up in a massive depopulation anxiety (*“finis Galliae”*), were, at least partly, of a military nature. Nikolas Dörr analyses this nexus between the military, welfare state development, and the fears of depopulation with a focus on the Third French Republic (1870-1940). Contrary to the standard account that state institutions in France would have hampered rather than promoted the introduction and expansion of the welfare state, he argues that the French state has promoted a pronatalist family and population policy out of military necessity.

Beginning with Italian unification, *Pierluigi Pironti* examines the warfare-welfare nexus in Italy. Conscription, the wars in Africa, and the modernization of the armed forces triggered some military-related welfare measures such as military pensions, but only the Great War marked an important turning point in welfare legislation. Italy's participation in industrialized mass warfare led to social reforms between 1915 and 1919 with a view to compensate the horrors and the tremendous social needs generated by the conflict. The adopted reforms not only covered veterans and their dependents but also improved the social protection and rights of civilians, as exemplified by the extension of accident insurance to agricultural workers in 1917 and the introduction of unemployment insurance two years later. However, the extreme political polarization in the post-war period and the resulting rise of fascism brought this short reform episode to an end.

Olivier Burtin uses a comparative perspective to examine the evolution of veterans' benefits in the United States from the colonial period until the Vietnam War. He shows that America's frequent and victorious involvement in

warfare, conscription in times of war and during the Cold War, the early introduction of white male suffrage, and the lack of civilian war casualties contributed to the emergence of a huge and generous veterans' welfare state. The degree of social protection for veterans is unique in international comparison, which is a major reason why the country stands out in comparative social policy more broadly. From early state-building onwards, veterans were granted exclusive welfare benefits which separated them from the rest of the population as veterans could successfully claim that they had shouldered most of the burdens of war.

Issues of legitimacy related to war and military threat are discussed by *Klaus Petersen*. He examines the relationship between war, the military, and welfare state development in Denmark. Studying three episodes of (military) threats between ca. 1850 and 1950, Petersen shows that the welfare state was part of the national defence strategy of a small nation lacking military resources and power. This strategy was most pronounced during the Cold War.

Two contributions examine the nexus between conscription and social policy in the global south. The article by *Delia González de Reufels* looks at Chile. Chile is known as a pioneer in social policy in Latin America while it has also been characterized as a country in whose national history military conflicts have loomed large. Both fields – Chilean social policy and military history – have met with considerable scholarly interest over the last years, yet the role of the Chilean armed forces in the development and implementation of social policies remained unexplored. Delia González de Reufels traces the interests and possible influence of the Chilean army on health care and education. Using writings of army doctors and of military reformers who became more outspoken after Chile won the War of the Pacific against Peru and Bolivia (1879-1884), her article explores the impact of the army on these classic fields of state intervention. She furthermore analyzes the debate on general conscription, examines the arguments used in favor of universal military service, and assesses potential connections to social policy issues.

The contribution by *Carina Schmitt* addresses the role of the military, warfare, and conscription for the provision of social rights and social protection in former French African colonies, especially in French West Africa, from the beginning of the 20th century until the short aftermath of World War II. No other imperial power militarized its colonial societies to the extent that France did. The article shows that the introduction of mass conscription and World War I did not result in any systematic handling of social issues in French West Africa. However, the introduction of the draft and the experience of World War I molded soldiers and veterans as a societal group, which then started to demand social rights. This development paved the way for later social changes in the course of World War II. It heralded major reforms, such as uniform pensions for soldiers throughout the Empire, the abolishment of the *Code D'Indigénat*, and the expansion of education and health services.

Special References

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"Military & Welfare State: Conscription, Military Interests, and Western Welfare States in the Age of Industrialized Mass Warfare"

- Burtin, Olivier. 2020. The History of Veterans' Policy in the United States: A Comparative Overview. *Historical Social Research* 45 (2): 239-60. doi: [10.12759/hsr.45.2020.2.239-260](https://doi.org/10.12759/hsr.45.2020.2.239-260).
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