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### 3 A Democratic Way of Life: Institutionalizing Individual Freedom in Norway

In this chapter, I outline a broad institutional explanation of the Norwegian democratization of freedom based on three pillars.<sup>1</sup> The first is *horizontal differentiation*: Norwegian society is split into many relatively autonomous basic institutions that by way of collectively produced public goods provide many opportunities and choices for its members. The second is *vertical integration*: A strong state coordinates these institutions to secure all members of society access to these public goods. The third is *liberal containment*: To protect individuals against the potential illiberal consequences of big institutions coordinated by a strong and ambitious state, a set of negative institutional constraints have been set up, in particular civil rights, rule of law and democratic accountability. Together, and this is the main argument of the chapter, these three complementary institutional pillars provide most members of Norwegian society with a combination of rights, resources and lifestyle options sufficient to be in control of and responsible for their lives.

The chapter proceeds as follows. I begin by addressing the relation between democracy and freedom and also briefly discuss how to define and measure freedom. Next, I present empirical support for the claim that Norway has democratized freedom. To explain this fact, I go on to depict the ‘proximate’ institutional matrix that enables the mass-production of individual freedom in Norway. Just as there are ‘varieties of capitalism’, I argue that there are ‘varieties of freedom’. Hence, to develop theoretical tools for depicting the different ways liberal democracies institutionalize freedom, I first present what I call the zero-sum Robinson Crusoe Model, according to which the essence of social freedom is to build down and/or tame institutions. As this model does not fit the Norwegian case very well, I next construct an alternative positive-sum model, which I call the Lilliput Model, according to which the essence of social freedom is to build a dense network of enabling institutions and apply it to the Norwegian case. In this part, my main argument is that Norway exhibits an institutional combination of horizontal differentiation and vertical coordination highly conducive to freedom. However, as the problem with strong institutions is their potentially ‘dark’ and illiberal consequences, the ultimate key to the Norwegian success, I propose in the final part, is a longstanding and productive tension – institutionally and socio-politically – between the positive ‘social-democratic’ freedoms created by big institutions and the negative ‘liberal’ freedoms that constrain and tame institutions (the state in particular). I end by summing up and raising some questions.

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The chapter confines itself to the Norwegian context. Due to its success, the country provides important insights into what it takes to institutionalize individual freedom. The Norwegian case also has important implications for several debates in the social sciences, as I will demonstrate below. Moreover, as the Nordic countries have much in common (Dølvik, Fløtten, Hippe, & Jordfald, 2015, pp. 17–23; Engelstad, Larsen, & Rogstad, 2017), much of what I have to say is valid for all the Nordic countries – and also as a counterpoint for comparative analyses of other types of societies.

### 3.1 Democracy and Freedom

According to political philosophers such as Locke (1988), Kant (1991), Mill (1989), Rawls (1999, 2005), Dahl (1989), Habermas (1996), Held (2006), Sen (1999, 2009), Nussbaum (2011) and Honneth (2011), individual freedom is the core value of modern liberal democracies. All their differences regarding the conceptualization of freedom and its place in society notwithstanding (and not all would subscribe to the somewhat substantial idea of a ‘democratic way of life’ discussed in this chapter), these thinkers agree that liberal democracies should strive to maximize some thick-or-thin version of individual freedom subject only to the constraint of universalism: that all members of society enjoy the same basic freedoms. Moreover, empirical research corroborates that one of the most important reasons why lay people value democracy is because it provides individual freedom (in particular a combination of freedom of choice and equality of opportunity) and not only, for instance, conflict resolution and efficient resource allocation (Welzel, 2013). Broadly speaking, social scientists who want to assess the extent to which this normative ideal is embedded in the empirical facticity of modern societies may take a restricted or a broad approach. The *restricted* approach implies looking only at formal political institutions such as parliament, government, public administration and elections and political actors such as political parties and interest groups. A very comprehensive research tradition in political science and political sociology exists that does so. However, and as several of the political philosophers above also emphasize (cf. Rawls’s idea of the ‘basic structure’ of society), the extent to which a society realizes individual freedom depends not only upon the quality of formal political institutions but also upon the quality of a broader set of institutions – such as family, work life, educational system, religion, art, science and media – and how these work in concert with political institutions (Engelstad, this volume, Ch. 18). Thus, the *broad* approach addresses the way in which society as a whole affects individual freedom. Using a term coined by Dewey (1991), and further elaborated upon by Hook (1938) and Honneth (2015, Ch. 4), it assesses the degree to which a ‘democratic way of life’ has been realized: the extent to which a society’s basic institutions allow its members to mutually treat each other as equally free. Of course, the problem with such an approach is the increased complexity it entails. Nevertheless, it makes it possible to assess the overall degree to which individual

freedom – the core democratic value – is institutionalized in society. The current chapter applies the broad approach and asks how and to what degree a democratic way of life is institutionalized in Norway.

To do so, we need a definition of freedom. Freedom is very much an ‘essentially contested concept’ (Gallie, 1956), so much so that a historical survey documented over 200 different ways of using the term (Berlin, 2002, p. 168). This is not the place to go into the wide-ranging and often highly technical conceptual debate over freedom (I have done so elsewhere, e.g. Aakvaag, 2013a, Ch. 1). Suffice it to say, I start out not from the philosophical debate over ‘free will’ (Kane, 2005) but from action-theoretical premises in the Weberian tradition. According to this view, to act is deliberately to change – or deliberately abstain from changing – the world according to an intention (Weber, 1978, pp. 4–26). I define freedom as *successfully* changing the world according to an intention. Why? Because when we succeed in deliberately changing the world according to an intention, we are *in control of* and *responsible for* what we do, which are the two main ingredients of freedom (Svendsen, 2014, Pt. 1). Moreover, following Berlin’s (2002, pp. 169–181) distinction between negative and positive freedom, success in action depends upon two types of conditions: the absence of constraints (negative freedom) and the presence of enabling resources (positive freedom).

Empirically, we can measure individual freedom in different ways. One important approach, used for example by organizations such as *Freedom House*, looks at the prevalence and status of individual civil and political rights. Rights are important for freedom. But assessed from the action-theoretical perspective this approach overlooks that people need economic, cultural, social, political and other resources to translate ‘formal’ into ‘substantial’ freedoms. Consequently, a second approach measures resources. Nevertheless, the problem with resource-based metrics of freedom is that they do not consider the degree to which resources due to personal, social or other circumstances translate into actual potential for action (Sen, 1999, Ch. 3). A third somewhat different approach measures the degree to which individual freedoms – ‘emancipatory values’ – are culturally valued in a society (Inglehart, Foa, Peterson, & Welzel, 2008; Welzel, 2013). However, although research indicates that the cultural valuation of freedom to some extent mirrors actual levels of freedom in a society (Welzel, 2013), people might value freedom because they have it or because they do not.

Due to the shortcomings considered from an action-theoretical point of view of these three approaches, I will apply a fourth approach: the capability approach, developed in particular by Sen (1999, 2009) and Nussbaum (2011). Instead of rights, resources and cultural valuations, it accentuates what individuals can *actually* do and be and therefore fits nicely with my action-theoretical conception of freedom. Briefly summarized, the capability approach looks at a person’s ‘transformative capacity’ (Giddens, 1984, p. 15) – that is, the ability to intervene in the world and causally influence social and physical processes and outcomes to successfully implement one’s action plans. In other words, it emphasizes one’s actual ability to do the things

one wants and live the life one has reason to value. Schematically, the capability approach can be summarized thus: resources (assets one disposes) → personal and social conditions (ability to convert assets into transformative capacity, dependent upon personal, social and other circumstances) → capability set (a person's menu of actual doings and beings) → functionings achieved (the set of doings and beings one chooses to realize) → utility: personal well-being (quality of life). Now, which concrete capabilities does a person depend upon in order to be free? On this point, Sen has been deliberately vague. Nussbaum (2011, pp. 33–34), however, has developed a (revisable) list of ten capabilities: bodily health; bodily integrity; senses, imagination and thought; emotions; affiliation; other species; play; and control over one's environment.

### 3.2 The Norwegian Democratization of Freedom

If we now turn to the empirical findings that result from applying the capability approach, the picture is quite clear: Norway has successfully institutionalized individual freedom. Indeed, Norway is currently one of the freest societies in the world. This is a strong claim, but it receives empirical support from several sources.

The United Nation's Human Development Index (HDI) is the most influential capability metric currently used, developed for the UN in 1990 by Sen and fellow economist Mahbub ul Haq. It is an index composed of three dimensions assigned equal weight: health, education and economic living standards. Each country is allocated a number between 0 (worst) and 1 (best). In 1990 Norway ranked fourth, whereas every year since 2000 Norway has been number one. In 2015, based on the latest available report from 2016, Norway again topped the list of 188 nations, scoring 0,949 (UNDP, 2016, pp. 198–201, Table 1). Importantly, Norway retains its top position on the Inequality-Adjusted HDI (IHDI), which weighs in the social distribution of health, education and economic living standards. In fact, the numbers for 2015 reveal that replacing the HDI with the IHDI even increases the distance between Norway and all other top ten countries (UNDP, 2016, pp. 206–209, Table 3). This is not the case for many other developed countries, such as the United States, which drops 10 places (from 10 to 20) when we include the social distribution of capabilities. In short, the HDI provides evidence for the mass-production of freedom in Norway, whereas the IHDI provides evidence for its egalitarian distribution.

HDI's strength is that it produces a simple and transparent single-digit index based on the capability approach, which makes it relatively simple to measure, compare and rank countries empirically. However, with simplicity comes a weakness: the HDI leaves out many dimensions on Nussbaum's list of capabilities. Thus the OECD has recently developed a more complex and wide-ranging measure: the *Your Better Life Index*, based on 11 measures of welfare all related to Nussbaum's list of capabilities: income, jobs, housing, health, work-life balance, education, community,

civic engagement, environment, safety and subjective life satisfaction. On this index, assigning each of the 11 measures the same weight, out of 34 OECD countries Norway again tops the list based on data from 2015 (OECD, 2017).

Other measures of objective welfare and subjective well-being are highly consistent with the findings presented above. Thus, a recent broad survey concluded that ‘irrespective of whether we look at objective welfare, subjective well-being, or attempts at combining the two (...), and almost irrespective of which measures we use, Norway scores very high. It is not always on top, as on the HDI, but usually not far away’ (Barstad, 2014, p. 355).

To summarize the findings, there is strong empirical evidence that Norway has *democratized freedom*. The opportunity to live ‘one’s own life’ is no longer a privilege reserved for a small group of aristocrats, wealthy farmers, industrial capitalists and bureaucratic elites. On the contrary, most Norwegians have the freedom – capabilities – necessary to be in control of and responsible for their actions and lives, which of course does not mean that freedom is perfectly equally distributed. In short, a democratic way of life organized around individual freedom for all (or most) exists.

The hard part, to which I now turn, is to explain this.

### 3.3 An Institutional Approach

What will an explanation of the Norwegian democratization of freedom look like? To begin with, by explanation I limit myself to a search for the ‘proximate’ social causes that currently mass-produce individual freedom. Moreover, I will not provide an explanation in the sense of subsuming the Norwegian case under a general law or mechanism (Hedström, 2005), even though my institutional explanation relies on social mechanisms (Aakvaag, 2013b; Pierson, 2004 pp. 6–7). Rather, as institutions are the place to start when one wants to study the macro-properties of society and their consequences for a phenomenon such as freedom (Engelstad & Hagelund, 2015, p. 2), I will provide an institutional explanation.

So what is a social institution? This concept is almost as ‘essentially contested’ as freedom. To cut a long story short, I define social institutions as the *rules* and the *regularities* they yield that stretch across substantial slices of time-space and give societies their constitutive characteristics (Berger & Luckmann, 1991; Giddens, 1984; Scott, 2008). Moreover, institutions are the main components of social structure because they create order – predictability and cooperation (Elster, 1989, Ch. 1) – in society. This concept of institutions is wide-ranging and includes many types of rules (moral, cognitive and legal; formal and informal; conditional and unconditional; prohibitions and entitlements), motivations for adhering to them (instrumental rationality, habit, moral reflection, emotions) and corresponding types of social regularities. Consequently, my explanatory strategy is to look at how the dominant rules and regularities of a society affect freedom. More specifically, I

search for the rules and regularities that create and distribute a wide-ranging set of capabilities to most Norwegians. Methodologically, my approach is a theoretically mediated empirical reconstruction with synthesizing ambitions. That is to say, I use pre-existing empirical research ('empirical reconstruction') in combination with a theoretical framework ('theoretical mediation') to come up with a totalizing model of the overall institutional set-up of Norwegian society and how it affects individual freedom ('synthesizing ambitions').

### 3.4 Empirical, Theoretical, Comparative and Macro-Sociological Challenges

In doing so, we encounter several challenges. First, sociologists studying Norway have had much to say about equality and solidarity but surprisingly little about freedom, given its cultural and institutional importance (Aakvaag, 2017). Hence, an extensive empirical body of literature addresses the production and reproduction of social inequalities related to class, sex and ethnicity (e.g. Dahlgren & Ljunggren, 2010; Korsnes, Hansen, & Hjelbrekke, 2014). In addition, there exists an extensive corpus of literature addressing solidarity (social integration and inclusion) in the Norwegian model (for overviews, see Dølvik et al., 2015; Hippe & Berge, 2013). With the rare exception of Rogoff Ramsøy (1986), and with the exception of research on democracy (some of which I will draw upon below and which, moreover, is mostly conducted by political scientists), explicit research on freedom in the Norwegian model is more or less absent. Of course, research on inequality and solidarity is highly relevant for a Norwegian sociology of freedom, but it does not explicitly address the question of how individual freedom – which overlaps with but is different from both equality and solidarity – is institutionalized in Norway. I call this the *empirical gap*.

If we want to 'bring freedom back', we encounter a second theoretical problem. Much of the existing literature in political philosophy (more soon) and social theory (see Aakvaag, 2016) is based on a zero-sum theoretical model of social freedom: creating freedom by dismantling or taming institutional constraints. As I argue below, this model cannot adequately account for the Norwegian democratization of freedom for the simple reason that it is also the product of creating enabling institutions. I call this the *theoretical gap*.

If we go to yet another research field, institutional studies of modernization, we run into a third problem. Central to this research is a distinction between free 'thriving' societies (the West) and unfree 'suffering' societies (sub-Saharan Africa and much of the Arab world), with a set of 'struggling' societies (several east-Asian and Latin-American societies) in between (Welzel, 2013, pp. 18–25). To explain these differences, researchers have coined a theoretical distinction between 'inclusive' (Acemoglu & Robinson, 2013), 'open access' (North, Wallis, & Weingast, 2009) and 'modern' (Fukuyama, 2011, 2014) institutions conducive to freedom and 'extractive',

'limited access' and 'patrimonial' institutions that are not. A cluster of interconnected properties are said to characterize inclusive, open and modern institutions: all groups in society are granted political representation through open multiparty elections. Political elites are held accountable for the way they use power through multiparty elections. The rule of law constrains the use of political and social power. Professional, impartial, predictable and efficient bureaucrats conduct public administration. The judicial system is independent, rule-bound, predictable and impartial. Private property and contractual law enable markets with economic competition. A plurality of organizations flourish in a spontaneously organized civil sphere outside the state and markets. Intellectual and religious toleration is widespread. Society guarantees all members extensive civil and political rights. In short, inclusive, open access and modern institutions make economic, political and social institutions work for the benefit of *all* members of society. In contrast, extractive, limited access and patrimonial institutions are social instruments a small elite use to extract resources from the rest of the population. The distinction between inclusive/extractive, open/limited access and modern/patrimonial institutions is clearly an important first step that throws light on important properties of the Western societies that to a hitherto historically unprecedented degree have democratized freedom. Nonetheless, from the perspective of explaining the Norwegian democratization of freedom, this research exhibits two weaknesses. First, it ignores important institutional differences within the set of 'thriving' Western societies, such as those between, for example, the 'liberal' US, 'corporate' Germany and 'social-democratic' Norway. Thus Welzel (2013), Acemoglu and Robinson (2012), North, Wallis and Weingast (2009) and Fukuyama (2011, 2014) do not distinguish between different subtypes within the set of 'thriving' societies. Second, the picture they paint is clearly reminiscent of Anglo-American societies. Indeed, they typically take England as their central case. Hence, they cannot fully account for what is distinct about Norway. I call this the *comparative gap*.

Finally, to capture this distinctness, which, I will argue, relies on a particular combination of horizontal differentiation and vertical coordination, we need to bridge a fourth *macro-sociological gap* in the field of 'grand' theories of modernity: that between 'horizontal' and 'vertical' approaches (Hagen, 2006).

### 3.5 Varieties of Freedom

To start bridging these four gaps and come up with an explanation of the Norwegian democratization of freedom, I seek inspiration from comparative research on institutions. The important point to take from this literature is that contrary to what we might expect in an increasingly global world-economy, there is no overall convergence in types of welfare-regimes, labour-markets and capitalist economies. Rather, empirical research reveals that because they are embedded in different institutional matrixes, societies display different outcomes in welfare-regimes

(Esping-Andersen, 1990, 1999), labour markets (Bosch, Lehndorff, & Rubery, 2009) and capitalist economies (Hall & Soskice, 2001). In this chapter, I argue that institutions similarly shape individual freedom. Hence, just as there are varieties of welfare-regimes, labour markets and capitalism, there are Varieties of Freedom (VoF) – different ways to institutionalize individual freedom. If so, then we need to develop theoretical models that capture this variety and then use them to look at empirical cases.

To do so, I construct two models of social freedom (by which I mean how social structure affects freedom). They are ideal-types in Weber's (1949) sense: models ('mental constructs') that enormously simplify social reality. Hence, no society has institutionalized freedom precisely in the way depicted by the two models. Nevertheless, models are indispensable heuristic tools for detecting, conceptualizing and analyzing particular aspects of complex empirical social reality – 'harbors' in the 'vast sea of empirical facts' (Weber, 1949, p. 90). Moreover, by constructing *two* models of social freedom, it is possible to go beyond the simple free/unfree continuum and distinguish within the broad class of thriving societies between different ways of institutionalizing individual freedom. The two models start out from my definition of freedom as successfully changing the world according to an intention. As emphasized above, success in action essentially depends upon two categories of conditions: the absence of external constraints and the presence of enabling resources. Consequently, although we need both to succeed in action, we can for sociological purposes analytically delineate two broad categories of social freedom: the *absence of social constraints* (negative social freedom) and the *presence of enabling social resources* (positive social freedom).

### 3.6 The Robinson Crusoe Model: Zero-Sum Social Freedom

The Robinson Crusoe Model (hereafter RCM) starts out from the negative conception of individual freedom. Accordingly, to be free is to be unconstrained by others; it is to be able to do what one wants – whatever that may be (Berlin, 2002). To this corresponds a *zero-sum model* of social freedom: the more social structure, the less individual freedom (and vice versa). Why? Because institutions (structure) are understood as creating social order by taming the disruptive powers of individual freedom (Bauman, 1988, p. 5). Vice versa, individual freedom can thrive only where it is not constrained by the inner and outer constraints of social structure. I call this the RCM because his previous socialization notwithstanding, Robinson Crusoe, alone on his island (until he saves Friday from cannibals), epitomizes negative social freedom: no one around him imposes barriers on his actions; he is free to do as he pleases.

Although the negative zero-sum RCM of social freedom can be institutionalized in many ways, two principles are essential. I call them the principles of minimal and negative institutions. They correspond to a distinction between first-order and



second-order institutions, where first-order institutions regulate social life and second-order institutions regulate the way first-order institutions regulate social life. The principle of *minimal institutions* says that to maximize individual freedom, societies need to minimize institutions. This implies that institutions should be *deregulated* (the fewer rules that constrain action, the better), *flexible* (the more open and ambiguous the rules are, the more discretionary powers for individuals), *small* (the fewer people that adhere to an institution, the lesser impact it has on social life) and *decentralized* (to avoid asymmetries in power and subsequent social domination). The Market is the prime example of a minimal institution because markets (voluntary exchange of economic assets) are decentralized, deregulated, symmetrical and voluntary. The (nuclear) family and civil society are other examples. The principle of *negative institutions* acknowledges that people need constraining (first-order) institutional rules to coordinate their actions and make social life feasible. However, to shield individuals from the perils of ‘humanly made constraints’ (North, 1990, p. 3), societies also need second-order institutions to protect individuals from ‘greedy institutions’ (Coser, 1974). Hence, second-order institutions create obstacles not primarily to individual action (although they also have to do so to fulfil their task) but to first-order institutions. Three second-order institutions are particularly important: civil rights, rule of law and democratic accountability. Civil rights protect individuals from the state but also from other organizations, groups and individuals by providing them a legally protected private sphere in which they can act freely according to personal preferences. The rule of law constrains and makes predictable the way politicians and bureaucrats apply state-capacity. Lastly, democratic accountability and in particular multi-party elections domesticate political power.

Let me briefly assess the RCM. It has several strengths. Most notably, it articulates the fundamental insight that institutional rules and regularities often constrain individual freedom. Thus, without classroom rules, pupils could do as they please – including going home. Hence, it is no surprise that although not ruling the ground alone, this model of social freedom holds a strong position in classical and postclassical social theory and sociology (see Aakvaag, 2016). Furthermore, at the level of institutional implementation, the RCM rightly underscores the importance of first-order institutions that minimize and second-order institutions that tame institutional constraints on freedom. Not surprisingly, therefore, these principles influence liberal and libertarian political philosophers such as Locke, Kant, Mill, Berlin, Hayek, Friedman, Nozick and many others, although many liberal philosophers such as Rawls (1999), Barry (1995, 2005) and Goodin (1988) clearly go beyond it to include positive elements. Finally, the RCM is also empirically important. In particular, as we saw above in connection with ‘thriving’ societies, it captures the main aspects of political, legal, economic and social institutions in the ‘Anglos’ (the US, Canada, Great Britain, Ireland, Australia and New Zealand). As we are about to see, it also captures a key aspect of the Norwegian democratization of freedom.

However, there are several problems with the model. Here I will address two, one general and the other specific to the Norwegian case. The general problem is that the RCM has little to say about one rather obvious fact: just as institutions constrain individual freedom, they also ‘enormously enable action’ (Searle, 2010, p. 124). That is, institutions create ‘social capacities’ (Pierson, 2004, pp. 74–77): collectively created opportunities for action. For instance, without an art institution I could not ‘go to an exhibition’ or aspire to become an ‘artist’ (for details, see Aakvaag, 2015, 2016). The other problem is more specific to the Norwegian context. If our sole analytical tool for studying social freedom is the RCM, we can only assess the degree to which societies minimize and tame the illiberal potential of institutions. We cannot analyze the way in which institutions enable freedom. Neither can we compare different constellations of ‘positive’ enabling institutions and the ‘negative’ taming of illiberal aspects of institutions across societies. This is where Norway enters the picture. I argue below that to a much larger extent than, for example, the Anglo-American the Norwegian democratization of freedom is dependent upon creating a tight institutional network of enabling rules and regularities. Indeed, I argue that this is the main reason why Norway consistently achieves such high rankings on empirical measures of freedom.

### 3.7 The Lilliput Model: Positive-Sum Social Freedom

This brings us to the second model of social freedom, which starts out from Berlin’s idea of positive freedom and the insight that to be free – in control of and responsible for one’s actions – the *absence* of external social constraints is not enough. A person also needs the *presence* of enabling social resources that translate formal freedoms into actual capabilities. Hence, this model portrays institutions (and social structure more generally) as enabling human action. How? On one hand, institutions create ‘outer’ (objective) opportunities for action, such as buying goods for money, attending a soccer-game or getting an education. On the other hand, they help people create and sustain the ‘inner’ (subjective) beliefs, preferences, values, life-projects, identities and decisional capacity they need to make use of social opportunities. Thus in stark contrast to the negative zero-sum model, the positive model is founded upon a *positive-sum* model of the relation between social structure and freedom: the more structure, the more freedom. Even though the zero-sum model has dominated social theory and sociology, thinkers such as Giddens (1984), Habermas (1987), Bourdieu (1990), Searle (2010), Honneth (2011) and Foucault (1980) have taken important steps in developing a positive-sum model of social freedom (see Aakvaag, 2016).

If we turn to the institutionalization of positive-sum social freedom, two principles are salient: density and coordination. The principle of *institutional density* is a first-order principle stating that the broader the menu of enabling institutional rules and regularities in a society (that is, the more social capacities that are created), the more an individual is capable of doing. Moreover, the best way to create such density

is by ‘horizontal’ institutional diversity – that is, by assembling a large number of relatively autonomous institutions that enable a plurality of actions, practices, lifestyles, identities and life-projects. The principle of *institutional coordination* is a ‘vertical’ second-order principle stating that to create an integrated system out of all the enabling institutions, a political centre, such as a state, must actively monitor and regulate the aggregated output of first-order institutions.

I call this model the Lilliput Model (LM) because the Lilliputs in Jonathan Swift’s novel *Gulliver’s Travels* tamed the giant Gulliver by a combination of a dense network of many small ropes (institutional density) and the coordinating efforts of their king (institutional coordination). In other words, the ‘giant’ of social un-freedom – that is, elites that use ‘extractive’, ‘patrimonial’ and ‘limited access’ institutions to repress and exploit ‘lilliputs’ (ordinary people) – is tamed by a dense, coordinated network of institutional rules and regularities that supply ordinary people with the social resources they need to be in control of and responsible for their lives. This is the essence of the LM.

To assess it briefly, the benefit of the LM is that it takes steps towards opening the black box of positive-sum social freedom. By thus starting to bridge the *theoretical gap* in the sociology of freedom (creating a model of how institutions by way of social capacities enable individual freedom), it can also help bridge the *empirical gap* (bringing freedom back into research on the Norwegian model), the *comparative gap* (the VoF can be analyzed as different constellations of LM and RCM elements) and the *macro-sociological gap* (by combining horizontal and vertical elements in a ‘grand’ theory of modern freedom).

However, assessed from the perspective of institutionalizing individual freedom, the LM exhibits the problem of the ‘asymmetric society’ (Coleman, 1982): big institutions, small individuals. That is, institutions convey power, resources, information, legitimacy, coordination capacity etc. onto designated actors. Indeed, the whole point of institutions from the LM perspective is to create such social capacities. The problem is that individual and collective actors might seize these and use them for illiberal purposes; and if so, ordinary individuals have little potential for resistance. Modern authoritarian and totalitarian political regimes clearly illustrate the illiberal potential of modern institutions (Arendt, 2004), as does the more benign paternalism of the welfare state (Habermas, 1987). There is, then, a ‘paradox’ of institutionalizing positive-sum social freedom: one cannot assemble institutions to create social capacities without the risk that someone seizes them for illiberal purposes. This is the endemic ‘dark’ side of Modernity (Giddens, 1985; Bauman, 1989; Mann, 2005; Wagner, 1994).

### 3.8 The Case of Norway

After a long theoretical detour into conceptions and models of social freedom, I return to the Norwegian case. Based on the distinction between the zero-sum RCM and the positive-sum LM, I now present an institutional explanation of the Norwegian

democratization of freedom based on three pillars: horizontal differentiation, vertical political integration and liberal containment. Put briefly, the claim I set forth is that the key to the Norwegian democratic way of life is a large number of horizontally differentiated basic institutions vertically coordinated in an egalitarian way by a strong state that creates social capacities and subsequent individual capabilities; these capacities and capabilities are then channelled in a liberal direction by means of civil rights, rule of law and democratic accountability. In this section, I use the LM to describe the specific Norwegian combination of horizontal differentiation and vertical coordination and provide empirical illustrations. In the next section, which is much briefer as my main goal is to argue the case for the explanatory importance of the positive-sum LM, I return to the liberal constraints of the RCM and the institutional complementarity between positive-sum and zero-sum elements.

### 3.9 Horizontal Differentiation: Institutional Diversity and Density

Contemporary Norwegian society is split up horizontally into several relatively autonomous fields: politics, law, economy, science, religion, art, health, education, family, military, civil society, sports, transportation and media. These fields qualify as *institutions* because they are grounded upon rules (values, norms and codes directed at social roles and backed up by sanctions) that produce regularities (predictability and cooperation) that stretch across large spans of time-space. Moreover, I call them *basic* institutions because they display both breadth (affect all or most members of society) and depth (have important consequences for objective life-chances and subjective identity). In other words, they are the basic building blocks of society. As each basic institution is founded upon separate rules and speaks different ‘languages’ (although there is much debate and conflict pertaining to how these institutional codes are to be interpreted in a given context), they are at least relatively autonomous. For instance, in Norway you cannot legally and legitimately buy love (family), legal decisions (law), favourable reviews (art), salvation (religion) or tenure (science) for money (economy). The relative autonomy also follows from organizations (schools, hospitals, universities) and professions (teachers, physicians, scientists) being important actors in the basic institutions, articulating (often codifying) and upholding the specific rules of each institution. From the perspective of individual freedom, horizontal differentiation and subsequent institutional diversity and density is extremely important because it creates social capacities and collective resources that are translated into individual capabilities by a multitude of mechanisms, such as a plurality of opportunities for actions, practices, identities, life-projects and lifestyles; resource efficiency; role-distance; multi-relational synchronization; exit-opportunities; and desire-independent reasons (see Aakvaag, 2015 for details).

Institutional differentiation is common to all liberal Western societies – although with much variation. What is typical of Norway, I will argue, is *coordinated*

differentiation. Hence, in Norway a democratic state in cooperation with collective actors from each field vertically coordinates – monitors and regulates and thus upholds – the basic institutions.

### 3.10 Vertical Integration: Collective-Political Coordination

According to Luhmann (1997), horizontal institutional differentiation leads to social fragmentation and a lack of overall coordination. In his view, as autonomous basic institutions speak different languages, they cannot understand each other; nor are any of them in a privileged position to govern the others. As a result, and despite much overlap and many ‘structural couplings’ between the basic institutions, modern societies are ‘polycentric’ – that is, a set of autonomous institutions mutually adjusting to, but not really communicating with, each other. Yet due to its high capacity for coordinated collective action, this is an inadequate sociological description of Norwegian society (Hagen, 2000). Indeed, Norwegian society has a strong coordinating institutional centre, with two pillars: 1) a strong liberal *state* that 2) through *neo-corporate* cooperation with central collective actors in the basic institutions coordinates – monitors and governs – society. More precisely, ever since a reformist bureaucratic elite started to modernize a rather backward agrarian Norwegian society in 1814, the year in which Norway changed from an absolutist monarchy into a liberal and at least partly democratic society, the state and politics have been the coordinating centre of the Norwegian modernization project (Sejersted, 2001, 2005; Slagstad, 1998, 2006, p. 169). Hence, during the last 200 years, state-capacity has continuously been expanded, democratized and seized by new social groups, such as peasants, workers and women, to reform Norwegian society (Aakvaag, 2017), resulting in the state being ‘virtually omnipresent in society’ (Engelstad, Larsen, Rogstad, & Steen-Johnsen, 2017, p. 2). The state, however, has not monopolized the coordinating function. Rather, a system of ‘corporate pluralism’ (Rokkan, 2010) has emerged in which the state coordinates society in close cooperation – by bargaining, arguing, consultation, exchanging information and lobbying in more or less formalized settings – with organized interest groups. As we are about to see, this coordination takes place throughout all the basic institutions, including the economy. Some see the aggregated result as a lack of overall coordination: a ‘segmented’ (Egerberg, Olsen, & Sætren, 1978) or even ‘fragmented’ (Tranøy & Østerud, 2001) state. However, because this system has operated ‘in the shadow’ of ideals, values and norms developed in a deliberating public sphere, it has been guided by the ‘regulative idea’ of democratizing freedom – the overall goal of the Norwegian modernization process (see Aakvaag, 2017).

In sum, by regulations, monitoring, economic support, budgetary allocations, re-distributional measures, information and the like, the neo-corporate political centre creates a wide menu of social capacities by supporting and upholding relatively

autonomous basic institutions; these are next translated into individual freedoms (capabilities) for the many by enabling universal inclusion into the institutions. Just to give it a name, I will call it *coordinated differentiation*. Much more could be said about this system, for instance about the existence of power struggles between an ambitious coordinating state and other organized interests within the basic institutions, but I will instead illustrate how it works in practice.

### 3.11 Coordinated Differentiation: Some Empirical Illustrations

For a selection of basic institutions, I will now briefly characterize the institutional basis for its horizontal autonomy, describe how it is vertically coordinated and upheld and point to important ways in which it contributes to the Norwegian democratization of freedom (for more details, see Engelstad & Hagelund, 2015; Engelstad et al., 2017).

*The economy.* The Norwegian economic field (which is deeply integrated into the global world economy) is a relatively autonomous basic institution founded upon a distinct set of values (economic profit), norms (private ownership, freedom of contract) and roles (seller, buyer). Its decentralized capitalist basis notwithstanding, it is also characterized by much coordination. Indeed, the Norwegian economy has been characterized as the ‘most extreme’ of the Nordic economies regarding neo-corporatism (Engelstad, 2015, p. 282). The Norwegian neo-corporate system goes back to the Basic Agreement (Hovedavtalen) between capital and labour of 1935 (see Falkum, 2015 for details). Thus, several periodically renegotiated collective agreements between organizations representing employers and employees in both the private and public sectors regulates Norwegian working life. Such collectively bargained agreements lay down the ground rules – rights and obligations – of the actors in working life on the national, industry and company levels regarding collective wage bargaining, employee participation, working conditions and much more. This arrangement is often called the tripartite system because even though the state leaves it to the parties to regulate working life, the state has a role both as facilitator (for instance, by providing reliable information) and third party (for instance, by initiating political reforms to overcome conflicts between the parties). In addition to the system of voluntary collective agreements, the state also coordinates working life more directly by statutory regulations, most notably through the Working Environment Act, which contains regulations regarding working environment, participation, work time and much more. However, the state also issues much additional legislation, such as the Norwegian Public Limited Liability Companies Act requiring at least 40 per cent representation of each gender in corporate boards (Teigen, 2015). The overall result is that despite the institutional autonomy of a capitalist economy founded upon private ownership and contractual freedom, Norwegian working life is highly regulated and coordinated – partly by the state, partly by the organized economic actors themselves and partly by cooperation between the state and the economic actors.

The result is an economy characterized by a climate of cooperation and trust, worker co-determination, efficiency, continuous ‘creative destruction’, affluence and a highly coordinated and compressed income-distribution (Barth, Moene, & Willumsen, 2014). In other words, and important in connection with the Norwegian democratization of freedom, what we have in Norway is not just ‘democratic capitalism’ (Sejersted, 1993) but also ‘egalitarian capitalism’ (Thelen, 2014); that is, Norway has chosen a participatory and redistributive way to capitalist affluence.

*Education and health.* Health and education are autonomous basic institutions structured according to specific values (prevent and cure sickness; individual learning and development), norms (pedagogical and clinical ethical and professional codes) and roles (doctor, nurse, patient; teacher, pupil) maintained by formal organizations (hospitals; schools) and professions. They are also the backbone of the Norwegian welfare state. A modern welfare state protects its citizens against risks associated with sickness, disablement, old age, pregnancy, child care, unemployment etc. that for longer or shorter periods make them unable to obtain a decent living by selling their labour power on the labour market (Esping-Andersen, 1990). The ‘social-democratic’ Nordic welfare state differs from the ‘liberal’ Anglo-American and ‘corporate’ Continental by its universalism, extensive welfare measures, high level of benefits and crucial role of the state (Esping-Andersen, 1990, 1999; Kuhnle, 2014, p. 342). To begin with, the state directly subsidizes its citizens in times of need. Furthermore, in a Nordic welfare state like that of Norway, the state provides free or highly subsidized public services in health and education. As a result, both education and health are strongly coordinated basic institutions in which the state is involved in a number of ways, regulating, paying for and producing welfare services. Starting with health, the state regulates the rights and obligations of patients through the Patients’ Rights Act (Pasientrettighetsloven) and hospitals through the Health Organizations’ Act (Helseforetaksloven). Moreover, despite an increasing private market, specialist health services are mostly produced by the state through four regional health organizations, whereas the municipalities have the responsibility to assure that all citizens have a regular general practitioner providing non-specialized health services. Hence, in 2016, 10,5 percent of GDP (326 billion kroner) was spent on health, and 85 percent of this was covered by the public (SSB, 2017a). Much the same goes for education. Hence, even though the number of private schools has increased over the last decade, in 2016 more than 95 per cent of pupils in primary education attended public schools (SSB, 2017b), whereas in secondary education, more than 90 per cent of students attended public schools (SSB, 2017c). Moreover, the state regulates the rights and obligations of pupils through the Educational Act (opplæringsloven) and the overall aims, content and methods of schooling through the Framework Plan (Læreplanverket). As a result, despite being relatively autonomous institutions structured according to specific values, norms and roles, both health and education are basic institutions subject to substantial vertical (centralized) coordination by the state in cooperation with collective actors and professions in the fields. Moreover, due to ‘Nordic’ egalitarian

and universalist principles of equalizing access to health and educational services, the result of this coordination is substantial resource redistribution. In fact, an already low Norwegian Gini-coefficient for income distribution among households drops even more – from 0,23 to 0,18 – when the re-distributional effects of public welfare services are taken into account (Aaberge, 2015). In short, an important part of the explanation of the Norwegian democratization of freedom is creating social capacities in health and education through which high levels of social investments in the population are translated into individual capabilities for living long and healthy lives where most people can develop and express their cognitive, emotional, artistic, athletic and other potential.

*The family.* The family is a basic institution structured according to specific values (romantic love and intimacy), rules (formal and informal norms regulating relations between spouses and parents and offspring) and roles (spouses, parents and children). A very important part of the Norwegian (and Nordic) model is gender equality. Propagated by the ‘second’ feminist movement, the goal of gender equity has completely transformed Norway over the last 40 to 50 years – and in particular the family. Even though the family is a relatively autonomous basic institution, this social transformation could not have taken place without the coordinating efforts of the state. A key to this achievement is ‘state-feminism’ (Hernes, 1987): a ‘neo-corporate’ cooperation between women’s movements (organized societal interests) pushing women’s interests ‘from below’ and the state implementing woman-friendly measures ‘from above’. Most notably, the state aims for gender equality by statutory regulations such as the Gender Equality Act (Likestillingsloven); the Law on Abortion; and by mandating gender quotas in education, employment, politics, organizations, public commissions and corporate boards (Teigen, 2015, p. 102, Table 6.1). Moreover, by building out the welfare state, from the late 1960s onwards the state has created the kind of postindustrial service-jobs in health and education that many women want (Reisel, 2014). Finally, the state issues public benefits and services, making it possible for women (and men) to combine family and work. For instance, Norway has recently issued very favourable schemes for parental leave and benefits, schemes that also target individuals and not the family (i.e. the male breadwinner), creating economic independence for women (Esping-Andersen, 1999). In addition, day care has been built out since the 1990s, so that whereas only 50 per cent of children age 3–5 attended day care in 1990, more than 95 per cent do so today (SSB, 2017d). Altogether, the family has been completely transformed as Norwegian women have collectively abandoned their roles as housewives in the ‘doll’s house’ of the patriarchal family in favour of a much more gender-equal two-income family. Hence, in 1970, only about 45 per cent of women age 15–74 performed paid work, whereas today almost 70 per cent do so (SSB, 2017e). In 1970, men with higher education outnumbered women 3:1, whereas today the relation is 1:1; which will soon change in women’s favour as women currently make up 60 per cent of students in higher education as compared to only 30 per cent in 1970 (Olstad, 2017, p. 214). In 1971, women spent on average 5 hours and 55 minutes on household work per



day compared to 3 hours and 30 minutes in 2010 (Kitterød, 2012, p. 50, Figure 1). Gender equality and women's emancipation from the patriarchal doll's house is a seminal part of the democratization of freedom, making Norway one of the most gender equal countries in the world with regard to women's economic opportunities, educational attainments, health and political empowerment. Hence, Norway currently tops the UN's 2015 Gender Development Index, which measures the ratio of female to male HDI values (UNDP, 2017, pp. 210–213, Table 4), and comes in third on the World Economic Forum's (WEF) 2016 Global Gender Gap Index (WEF, pp. 10–11, Table 3).

*The media.* In Norway the media – radio, TV, newspapers, the internet, social media – are organized as a relatively autonomous basic institution structured according to specific values (access to information, scrutiny of power, democratic public debate), rules (freedom of speech, editorial freedom) and roles (editor, journalist, source, public). Recent decades have seen important structural changes in the media, in particular the de-politization of newspapers (from the 1970s); the abolition of the public broadcasting monopoly and deregulation of the media field (from the 1980s); digitalization, the internet and globalization (from the 1990s); and the emergence of social media (from the 2000s). Although these changes add up to a more deregulated, decentralized and pluralistic media institution, the media are still subject to much vertical coordination by the state – in cooperation with important actors from the field. Thus, the idea behind what is called the Nordic 'media welfare state' (Syvertsen, Enli, Mjøs, & Moe, 2014) is that communication – gathering, processing, discussing, criticizing and disseminating information – is a public good that should be distributed in equal measures to all members of society and something for which the state is responsible. The state contributes to this task especially in two ways: by regulations and money. Several laws uphold the institutional autonomy of the media field. Most importantly, ever since the Norwegian constitution of 1814 transformed Norwegians from docile subjects under an absolute monarchy into equal citizens protected by law, freedom of speech has been constitutionally protected as a basic right (Seip, 2010, Bk. I, pp. 49–51; Engelstad et al., 2017, pp. 54–55). Moreover, the Media Freedom Act (Mediefridomslova) protects editorial freedom. The institutional autonomy thus created is also upheld by (collective) actors in the media field, such as the Norwegian Press Association (Presseforbundet), the Association of Norwegian Editors (Norsk Redaktørforening) and The Norwegian Union of Journalists (Norsk journalistlag) voluntarily subjecting themselves to editorial principles (Redaktørplakaten), rules of journalism (Vær varsom-plakaten) and a system of self-evaluation (Pressens Faglige Utvalg). Furthermore, not only is the state 'negatively' prohibited from censoring opinions, but it must also 'positively' create the institutional infrastructure necessary for (democratic) public communication (NOU 1999:27, pp. 36, 249–250). Indeed, and explicitly inspired by Habermas's theories of the public sphere, deliberative democracy and communicative action (Kalleberg, 2015), Article 100 of the constitution explicitly imposes on the state a responsibility for 'enabling an open and informed public debate'. Partly, the state does this by creating a physical

infrastructure of communication by building telegraph and telephone lines, roads, railroads, ferry lines, network cables etc. It is therefore no surprise that Norway has been called a ‘communication state’ (Sejersted, 2000, pp. 55–70). In addition, the state subsidizes the media directly: by financing a public broadcaster (NRK), by exempting newspapers from having to pay the VAT and by economically supporting particularly vulnerable newspapers (Lundby & Staksrud, 2016, p. 230). In sum, the Norwegian media are a vertically coordinated basic institution providing broad access to central capabilities for citizens in a liberal democracy: access to information, participation in public debates and the scrutiny of the power elites.

*Religion.* Religion is another relatively autonomous Norwegian basic institution. It is structured according to specific values (transcendence), rules (a religious ethos) and roles (believer, priest) and is inhabited by several religious organizations (churches, sects, councils). The state coordinates the religious field in many ways. The first is by regulations, and in particular by freedom of religion. It was not always like this. Historically, the protestant reformation of 1536 gave Norway (then a part of Denmark) an Evangelical-Lutheran state church in which the state ruled the church and banned all other religions. Even the otherwise liberal constitution of 1814 was strikingly illiberal in regard to religious matters, proclaiming an official religion (Protestantism) and forbidding Jews, Jesuits and monasteries from entering Norway (Molland, 1979, pp. 15–17). A first step towards freedom of religion and institutional autonomy was taken when a law (‘Konventikkelpakaten’) used to silence Christian lay preachers was abolished in 1842, and another law (‘Dissenterloven’) in 1845 gave all Christians the right to practice their religion freely. Hence, around 1850 freedom of religion was in place, but only for Christians (Molland, 1979, pp. 170–185). Full freedom of religion – for all religions – did not become part of the constitution until 1964. Moreover, due to the ‘church compromise’ of 2008, as of 2012, Norway no longer has an official religion, and the state no longer governs the Church of Norway. Nonetheless, the ties between state and religion are still strong. To begin with, Article 2 in the constitution acknowledges Christendom (and humanism) as the historical axial foundation of Norwegian society, whilst Article 16 recognizes the Church of Norway as the ‘people’s church’. Second, we find clear elements of corporatism in the religious field. Several ecumenical, worldview, umbrella and inter-faith organizations such as The Council for Religious and Life Stance Communities (Samarbeidsrådet for tros- og livssynssamfunn) and the Ecumenical Council (Mellomkirkelig råd) have been founded in recent decades for the neo-corporate state to have ‘someone to talk to’ when addressing the challenges of an increasingly religiously pluralist Norwegian society (Furseth, 2017). Third, the state provides economic support. Article 16 in the constitution obliges the state to finance the Church of Norway, whereas the state also subsidizes all other organized religious communities as a function of their membership numbers. The state does all this because it considers the individual opportunity to develop and express one’s religious beliefs in an autonomous religious basic institution as a public good that should be part of the capability set of all Norwegians.

*The art world.* Norway contains an autonomous art institution structured according to specific values (the importance of aesthetic experience), rules (art for art's sake) and roles (artist, critic, public). In this 'art world' (Becker, 1982), painters, writers, poets, composers and the like create artworks judged by critics according to aesthetic criteria within the context of organizations such as museums, galleries, concert halls, theatres, publishers and literary houses (for an overview, see Solhjell & Øien, 2012). Its relative autonomy notwithstanding, during the postwar period, politicians assembled an administrative apparatus at the national, regional and municipal levels for coordinating the art world. They did so partly because museums, galleries, theatres etc. cannot live off ticket sales and private sponsoring. For instance, the most important Norwegian art organizations currently receive between 75 and 95 per cent of their revenues from the state, frequently less than 20 per cent from ticket sales and less than two per cent from private sponsors (Mangset, 2016, p. 255). In addition to granting income support to art organizations, the state finances and administers stipends to individual artists, buys books for public libraries, gives tax exemptions, provides information and counselling to artists, regulates the book market and the like. Now, is this not a threat to the institutional autonomy of the art world? Mostly not. The reason is the principle of 'arm's-length' distance (Engelstad et al., 2017, pp. 53, 59). It states that budget allocations and regulatory frameworks notwithstanding, art councils with specialists from the art-field – and not politicians and bureaucrats – are to make decisions based on purely aesthetic criteria regarding the allocation of resources. As the endemic conflict between a 'high' and exclusive notion of 'art for art's sake' and the instrumental use of art for other purposes (health, social inclusion, entertainment, productivity, national and local identity etc.) reveals, this is easier said than done – and creates legitimizing challenges for cultural organizations (Larsen, 2017). Be that as it may, the overall goal of the state's cultural policy has been to uphold and democratize access to the art world as part of creating a society in which aesthetic experience, cultural meaning and purpose in life are public goods accessible to all.

*Civil society.* The Norwegian civil society is a relatively autonomous basic institution structured according to specific values (grass-roots participation), norms (informal trust) and roles (members of NGO, activists), where non-profit and non-governmental organizations (NGOs) solve problems through the voluntary and self-governed collective action of citizens. Norway has a vibrant civil society springing both from a long tradition of voluntary communal work ('dugnad') and the new social movements that emerged during the 19<sup>th</sup> century to address the challenges caused by economic, social, cultural and political modernization (Lorentzen, 2010). Indeed, in a population of five million people, we currently find 2400 national and 106 000 regional and local NGOs, where over half the population do voluntary work each year, adding up to 144 000 full-time equivalents, and each Norwegian is on average a member of 2,1 NGOs (Andreassen, 2016, pp. 91–95). Despite its relative autonomy, the state coordinates civil society in several ways: by regulating it (for

instance by civil rights such as organizational freedom and freedom of speech), by financing it (NGOs receive on average 26 per cent of their income from the state and 16 per cent from regional and municipal authorities), by ‘co-opting’ it (NGOs perform tasks the state cannot afford to do or that they do better) and by incorporating it into the state apparatus to influence and legitimate political and administrative decisions (Nordby, 1994; Rokkan, 2010). From the perspective of institutionalizing a democratic way of life, civil society gives Norwegians the opportunity to live a ‘*vita activa*’ (Arendt, 1998), to act collectively to solve societal problems.

### 3.12 Liberal Containment

Taking the two principles of the LM – horizontal diversity and vertical coordination – as my point of departure, I have thus far argued that there is a Norwegian (and Nordic) ‘*Sonderweg*’ to a democratic way of life: to create a dense horizontal institutional network of enabling rules and regulations that is then coordinated by a neo-corporate state. Thus if my analysis is sound, the institutionalization of positive-sum social freedom must figure prominently in the explanation of the Norwegian democratization of freedom. Nevertheless, there are two problems with basing an explanation solely on the LM. Both concern the translation of institutionally created social capacities into individual capabilities.

The first challenge concerns the inherent dark side of the LM, namely the illiberal use of social capacities created by strong institutions. The atrocities committed by the Nazis, communists and fascists in the 20<sup>th</sup> century clearly testify to this (Sørensen, 2011). Even though Norway has never witnessed anything similar, it is not hard to find more moderate examples. For instance, in the first postwar decades the Labour Party, by means of a combination of charismatic leaders, a strong party organization and an absolute majority in the parliament, developed a highly centralized and technocratic way of governing Norway (Slagstad, 1998, pp. 336–364), even labelled the ‘one-party state’ by one historian (Seip, 1987). Another is the illiberal side of state-feminism, with its conceptions about how women should live their lives (Holst, 2002). Far from totalitarian, these examples nonetheless illustrate the empirical relevance of this challenge.

The second challenge is that Norwegian society clearly displays important aspects of the zero-sum RCM. If we look first at second-order institutions that regulate how first-order institutions regulate behaviour, ever since the new constitution of 1814, the Norwegian state has been subject to the constraints of rule of law, individual civil rights and democratic accountability (see Sejersted, 2001 for an overview). Despite shortcomings and setbacks, the overall picture is clear: a steadily expanding system of legal-political constraints has gradually tamed the illiberal potential inherent in strong institutions and social capacities. Hence, the Norwegian state is both strong *and* liberal (Engelstad et al., 2017, pp. 47, 53, 67). To

give some examples, the introduction of a parliamentary system in 1884 fortified the democratic accountability of state power. The liberal critique and subsequent watering down of the Labour Party's attempt after World War II to pass Enactment Laws that would give the state bureaucracy wide discretionary powers illustrates the importance of rule of law (Sejersted, 2001, pp. 310–346). Finally, the 'liberal turn' (Sejersted, 2009) and 'judicification' (Østerud, 2014) of the last couple of decades has strengthened individual rights: partly by protecting individuals in their specialized roles as consumers, pupils, patients and students and partly by incorporating the European Human Rights convention in Norwegian law (1999) and later in the constitution (2014). As a result, and despite the democratic deficits stemming from the EEA Agreement (Holst & Sti, 2016), Norway consistently performs very strongly on international measures of rule of law, civil rights and democracy (Freedom House, 2017, p. 18; Economist Intelligence Unit, 2016; see Knutsen, 2014 for an overview and discussion). If we look, next, at the most important first-order RCM institution, the market, ever since the abolishment of the privilege economy in the middle of the 19<sup>th</sup> century, it has been the central economic institution in Norway. Moreover, as a response to what has been called 'state-expansion and market-fragmentation' (Berrefjord & Hernes, 1978) under the Labour Party in the first postwar decades, a neoliberal reaction set in starting in the 1980s with the deregulation of housing and finance markets; the abolishment of previous state monopolies in broadcasting, telecom and energy; and the privatization of former state-enterprises. Moreover, since the 1990s, public administration has also been subject to a wide variety of market-inspired reforms (Hippe & Berge, 2013, pp. 99–122).

In sum, in Norway the zero-sum RCM elements – civil rights, rule of law, democracy and markets – have gradually expanded to contain the illiberal potential of social capacities created by horizontal differentiation and vertical integration by protecting the individual and thus channelling them in a liberal – freedom enhancing – direction.

### **3.13 Institutional Complementarities, Collective Action and Political Conflicts**

If I am right, then, there is an institutional duality residing at the bottom of the Norwegian democratization of freedom. To argue this, I will introduce a final distinction between three types of capabilities. *Formal freedoms* denote civil and political rights: a legally protected sphere for individual and collective self-determination. *Resource freedoms* denote income, education, health, social networks and other forms of economic, cultural, social and physical resources an individual needs to make actual use of formal freedoms. Finally, *social freedoms* denote a wide variety of actions, identities, life-projects and lifestyles from which

to choose that give content to rights and resources. The prevalence of these three capability types goes a long way in providing the freedom to be in control of and responsible for one's actions and life in Norway. As we have seen, negative *RCM freedom* (civil rights, rule of law and democratic accountability) provides formal freedoms, whereas positive *LM freedom* (horizontally differentiated and vertically coordinated basic institutions) provides resources and social pluralism. What is more, this duality is also a case of institutional complementarity. On one hand, civil rights, rule of law and democratic accountability contain and channel the social capacities created by institutionalized social capacities in a liberal direction. On the other hand, the social capacities created by horizontal differentiation and vertical coordination guarantee the 'real value' of the formal rights to private and collective autonomy entailed in civil rights, rule of law and democratic accountability. This institutional complementarity, I suggest, is foundation of the Norwegian democratization of freedom.

The social capacities produced by vertically coordinated institutional differentiation and channelled in a liberal direction by formal freedoms are, moreover, public goods created and sustained by collective action. In Norway, nationwide social movements of bureaucratic elites, peasants, workers and women laying down, applying and extending the democratic power circuit have been essential in this regard (Aakvaag, 2017). However, there have also been conflicts. Albeit a simplification, we might say that liberal and conservative political parties and interest groups on the right have fought for social freedom according to the zero-sum RCM, aiming to protect the individual against 'society', whereas socialist and social-democratic parties and interest groups on the left have fought for positive-sum social freedom according to the LM, aiming at 'freedom for all'. The conflicts between the two sides have often been fierce, as in the case of class conflicts and strikes in the interwar period, the debate over the Enactment Laws in the first postwar years, the student rebellions of the 1960s and 1970s and the neoliberal challenge to the social-democratic order in the 1980s. Nevertheless, the overall trend is one of convergence, consensus and complementariness. For instance, after a brief Leninist period between 1919 and 1923, the Norwegian Labour Party mostly accepted parliamentary democracy, rule of law, civil rights and (regulated) capitalism. In the same way, it was a conservative-centre government that enacted (in 1966) and implemented (in 1967) the National Insurance Scheme, the cornerstone of the Norwegian welfare-state. Subsequently, and despite ongoing debates over how best to preserve it, not only do all political parties and the dominant collective actors in the basic institutions (such as the economy) today accept the main principles of the Norwegian (and Nordic) model, but so do most of the population (Hippe & Berg, 2013, pp. 126–132).

### 3.14 Concluding Remarks

Let me sum up and conclude. This chapter, which addresses the institutionalization of individual freedom and the democratic way of life in Norway, makes three claims. The *empirical claim* is that Norway has democratized freedom measured as individual capabilities. Individual freedom is no longer an elite privilege but is instead distributed rather widely across the population. The *theoretical claim* is that to explain this social fact, we need to develop a positive-sum model of social freedom that both challenges and supplements the influential zero-sum model. Finally, the *explanatory claim* is an institutional explanation of the Norwegian democratization of freedom founded upon a combination of the positive-sum LM and the zero-sum RCM. I will sum it up in four steps: 1) In Norway, modernization has unleashed a specific combination of horizontal institutional differentiation and vertical coordination – several relatively independent basic institutions subject to coordination by the state in cooperation with collectively organized actors in each basic institution. 2) This combination has created strong social capacities and the collective ability to create public goods that translate into individual capabilities – widespread opportunities for living long, healthy, enlightened and affluent lives with many choices across a wide range of different social settings and stages in one’s biographical life-course. 3) In addition, civil rights, rule of law and democratic accountability push these social capacities in a liberal direction and thus contain and tame the illiberal potential in ‘big’ institutions coordinated by an ambitious state. 4) Finally, and this is the main argument of the chapter, the explanatory key to the Norwegian democratization of freedom is precisely the institutional complementarity between a dense institutional network of enabling rules and regularities that creates resources and lifestyle choices and the liberal constraints that protect the autonomy of individuals.

The chapter invites many questions and lines of critique. Here, I will briefly address some of these. First, the purpose of this chapter is not to get all the details right; it is to outline the overall framework of an institutional explanation of the Norwegian democratization of freedom. Hence, all the elements presented – such as the models of social freedom, the critique of previous research, the institutional approach, and the proposed explanation – need to be developed and their interconnectedness discussed in much more detail, which is a task for further research. Second, the ‘proximate’ institutional explanation set forth must be supplemented with a ‘distant’ historical explanation that illuminates how and why Norway hit upon the historical path that led to the institutional complementarities portrayed above (Aakvaag, 2017 is an attempt). Third, the framework invites comparative studies of the ‘varieties of freedom’ – of how different ways of institutionalizing freedom (different combinations of RCM and LM elements) produce quantitative differences between the amount and distributional profiles of individual freedoms and qualitative differences between the types of freedoms

available to members of a society. Fourth, the democratization of freedom does not imply that all Norwegians are equally free. Due to social, psychological, biological and other differences between individuals, they differ in the size of their capability-set. Yet what it does mean is that most Norwegians exceed a capability threshold that gives them some basic control over their lives in such important areas as education, occupation partner, friends, place of residence, political preferences, worldview, religion, sexual practice, hobbies, entertainment and consumption. This, at least, is how I interpret Norway's high scores on the empirical measures presented above. Fifth, despite high levels of socio-economic equality and social mobility, not everyone in Norway is above that threshold. Currently, for example, almost 100 000 Norwegian children (ten per cent) grow up in poor families (SSB, 2017f.), whereas many jobs in construction, retail and the service sector are hard, monotonous and low-paid and provide little autonomy. More generally, among groups of immigrants, single mothers, the long-term unemployed and the chronically sick and disabled, many often find themselves partly outside the basic institutions and thus do not fully partake in the Norwegian democratization of freedom. (Note, however, that overall we are talking about only a small, single-digit percentage of the population.) Sixth, have I painted a too rosy picture, overlooking constraints, conflicts, tensions, inequalities and exclusion? In a way, yes. Even though I have emphasized the conflict between liberal and social democratic parties and social movements, I could obviously have paid more attention to social dysfunctions and conflicts. Nevertheless, the aim of this chapter has been to explain an instance of what I regard as a successful social outcome, the Norwegian democratization of freedom, and for that reason, I have emphasized the functional over the dysfunctional. Besides, I tend to think that compared to most other countries the Norwegian modernization process has been remarkably peaceful, characterized by high levels of convergence and consensus (Aakvaag, 2017). Finally, I have not addressed the current challenges to the Norwegian democratization of freedom, such as demographic changes, migration, the end of the oil economy, global warming, increasing social inequality and the fiscal problems of the welfare state. The last time the Norwegian (and Nordic) model faced external shocks and internal tensions, it adapted quite efficiently. Thus, in the early 1990s, looking back at the global oil crisis and student rebellions of the 1970s, the neoliberal assaults on the social-democratic order in the 1980s and the financial crisis and high unemployment rates of the late 1980s, many predicted the end of the Nordic model. However, as a result of extensive reforms, reorganization and reconstruction (and some luck), the last 25 years have been a second golden age (1945–1970 was the first) of the Norwegian (and Nordic) model (Hippe & Berge, 2013, pp. 151–152), combining efficiency, social equality, social inclusion and individual freedom. Even though recent history thus gives reason for moderate optimism, whether the Norwegian model will adapt to the current challenges remains to be seen. The stakes, however, are high: a democratic way of life founded upon the egalitarian democratization of individual freedom.



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